USF Libraries' Budget Realignment Strategy

Revisioning Library Services & Collections

Nelson Poynter Memorial Library, Budget Overview

- Required cut of 8.5% of the library's budget in the 2019/20 year.
  - Much of this came from the Collection Development & Technical Services Department (CDTS)
    - Vacant Library Faculty Line
    - Collection Development Budget
- Library Specialist position in CDTS remains open should we need to fund further reductions
- NPML pays a cost-share for electronic resources. However, the Tampa budget cuts have a direct "trickle down" effect on NPML.

USF Libraries Budget Overview (Tampa Campus)

Budget Overview

Library services and collections sustain the entirety of the "Architecture of Academic Excellence."
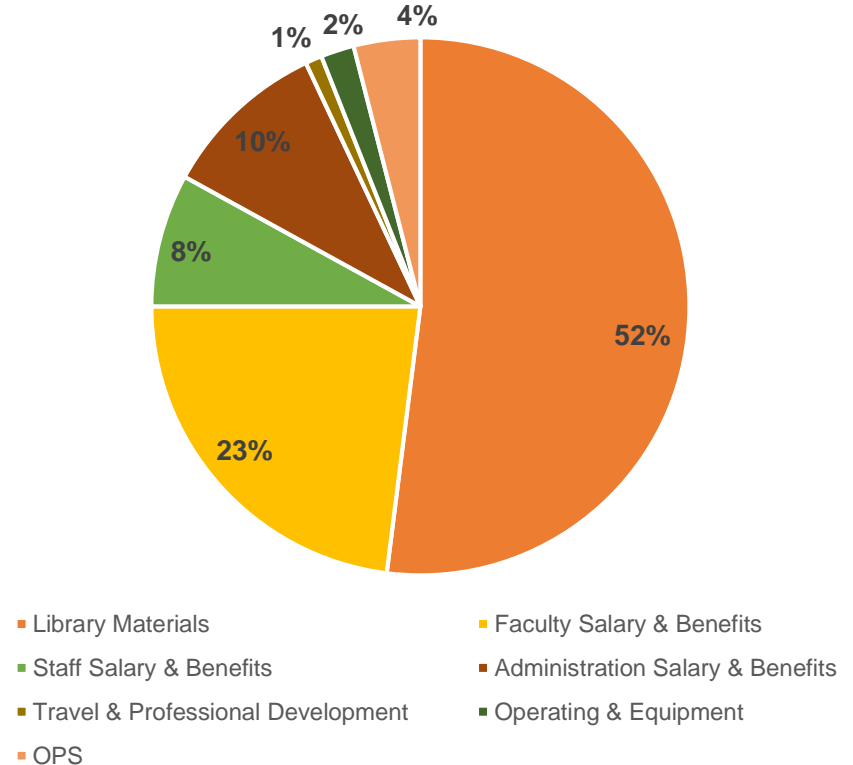
Discretionary funds to support program changes (content or level) and faculty/student demand are no longer available.

Significant personnel downsizing, multiple consultancies and **15 years of continuous process improvement** precede this reduction.
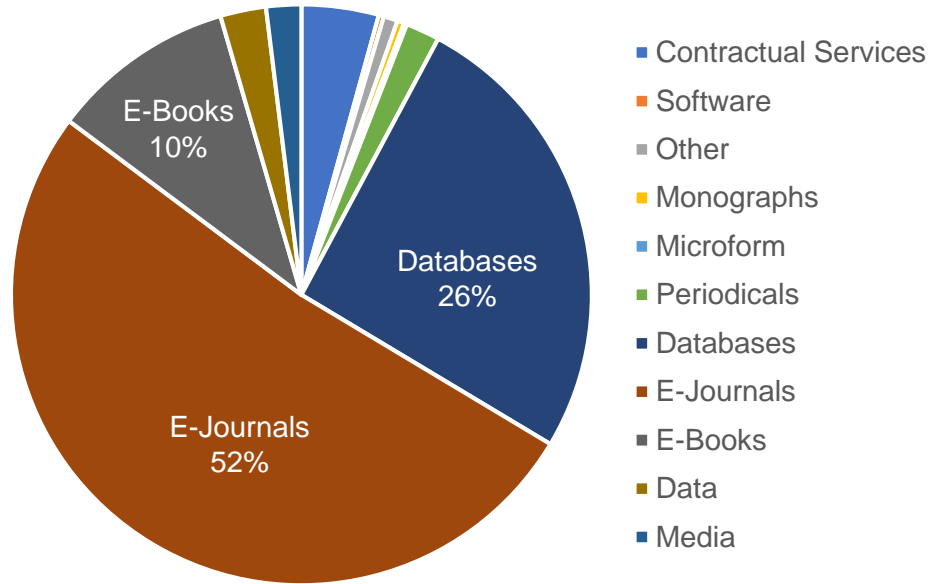
Library staffing is well below state peers and ARL target metrics.

Excessive focus on efficiencies have **reduced resiliency and increased risk**.

Breakdown of USF Libraries – Tampa campus Recurring Base Budget

- Library Materials — 52%
- Faculty Salary & Benefits — 23%
- Staff Salary & Benefits — 8%
- Administration Salary & Benefits — 10%
- Travel & Professional Development — 1%
- Operating & Equipment — 2%
- OPS — 4%

Recurring Base Library Materials Budget, 2019/20

Legend:
- Contractual Services
- Software
- Other
- Monographs
- Microform
- Periodicals
- Databases
- E-Journals
- E-Books
- Data
- Media

Subscription-based costs (97.2%) dominate the materials budget.

Annual Subscription Cost Increases*:

- Reduce services to faculty and students (use vacant rate to cover increases)

- Limit capacity to grow the collection in concert with College programs

- Constrain innovations needed to meet qualitative ARL expectations

*3.5 - 6 percent annually

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Guiding Principles & Summary of Collection Impacts

Guiding Principles

- **<u>Support faculty resource needs by any means available</u>**.
- Maximize control of the USF Libraries collection budget.
- Refocus expenditures on ownership over leased access.
- Engage faculty in decision-making process whenever possible.
- End reliance on non-recurring fund sources.
- Focus on USF needs over statewide impacts.

Strategy Requires Modification of "Big Deals"

Since the 1990s

- Packages "bundle" a publisher's title list into a single subscription

- Often multi-year agreements

- Controlled costs:
  - Capped annual increases range from 3.2 to 6 percent

- Increased research efficiency:
  - Reduced burdens on library and central services
 - Minimized options to manage journal collections/selections

Now: Sustainability Challenges

- Library budget flat for 12 years; increases funded by vacant rate and non-recurring cash

- Packages continue to grow without input from community

- Servicing the "Big Deals" fuel loss of non-journal content (e.g. books, data, media)

- Servicing the "Big Deals" reduce capacity to innovate with services

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Strategic Realignment Targets & Timeline

	$	%
Year 1	$1,383,500	10.4
Year 2	$650,000	4.9
Two-Year Total	**$2,033,500**	**15.3**

Vacant Rate 14%

Tools & Memberships 7%
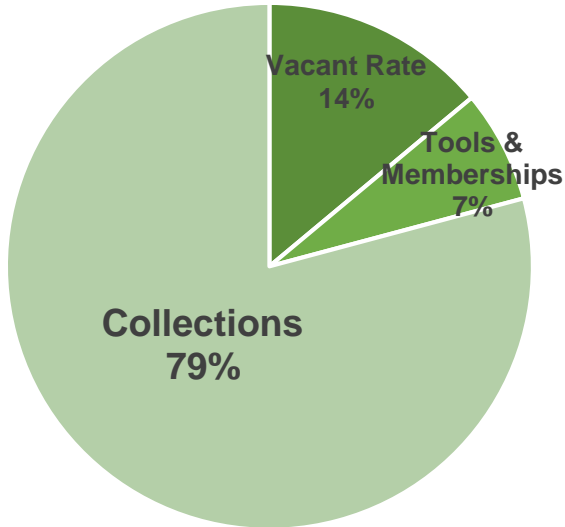
Collections 79%

1

Now through December

Notify vendors/ publishers that USF will be reviewing its current collection selections and will reacquire a subset.

2

November through January

Conduct a title-by-title analysis of our recurring collection.
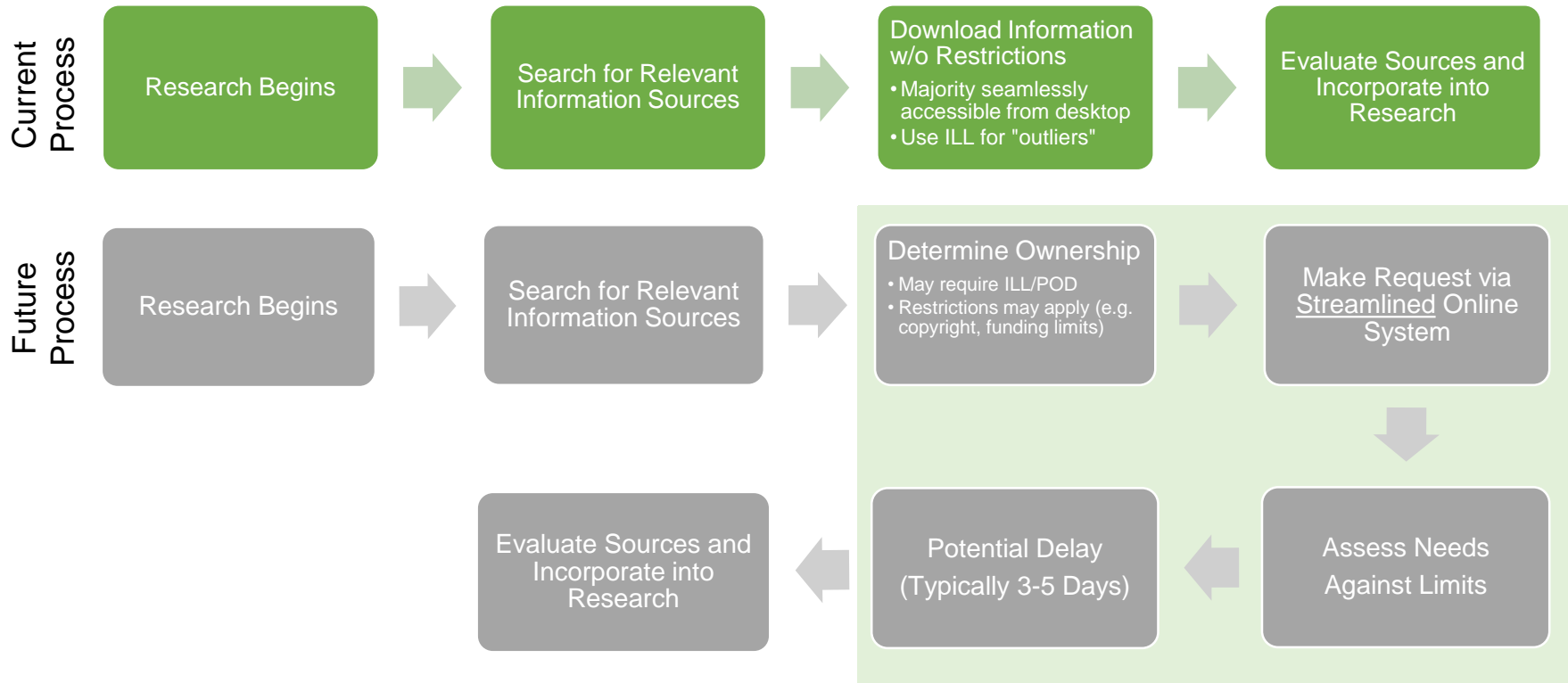
3

January through March

Reacquire content based on the analysis in Step 2.

ILL/Document Delivery and other mechanisms will be in place in January to bridge gaps.

4

March through May

Review and consider next steps on canceled content.

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Research Process Impacts

Current Process

| Research Begins | → | Search for Relevant Information Sources | → | Download Information w/o Restrictions
• Majority seamlessly accessible from desktop
• Use ILL for "outliers" | → | Evaluate Sources and Incorporate into Research |

Future Process

| Research Begins | → | Search for Relevant Information Sources | → | Determine Ownership
• May require ILL/POD
• Restrictions may apply (e.g. copyright, funding limits) | → | Make Request via <u>Streamlined</u> Online System |

| Evaluate Sources and Incorporate into Research | ← | Potential Delay (Typically 3-5 Days) | ← | Assess Needs Against Limits |

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Streamlined ILL / Document Delivery

https://lib.usf.edu/ill/

Requesting Books and Articles

Three ways you can get materials:

Check USF Catalog

In the USF Libraries catalog, click on the Request Item button to get items from the USF Libraries pulled, held, or mailed to you. Fill in the ILL books/loan form to complete your request.

USF LIBRARY--Tampa Circulating Collection	GB601.8 .H4	REQUEST ITEM	Available

UBorrow

For faster delivery of print books from other FL colleges and universities. Search the USF Libraries Catalog and click on the Uborrow icon. Uborrow books can be mailed temporarily for USF students, staff and faculty who cannot come to campus at this time.

InterLibrary Loan / Document Delivery

Borrow materials from USF libraries and other libraries. Articles & chapters can be scanned from requested materials and emailed to you.

HAVE A USF NETID?	DON'T HAVE A USF NETID?

Shifting to Meet Faculty Needs At This Time:
At the USF Tampa Library

Modified some existing services:

- Open Access publishing,

- Textbook Affordability Program,

- Oral history program,

- Digitization,

- Data management, and

- Digital Media Commons.

Staff from these units have been reassigned to:

- Collections & Discovery
  - to help us reacquire the most relevant content
- ILL / Document delivery
  - to support increased demand

Shifting to Meet Faculty Needs At This Time: At the Nelson Poynter Memorial Library

Librarians have assumed new responsibilities

- In Collection Development & Technical Services Dept.
- As Liaison Librarians to USF St. Petersburg programs

Reassigning Access Services Staff

- ILL / Document delivery – increasing capacity
- Student Technology Center – staffing help desk
- CDTS – helping with acquisitions, catalog, and fiscal system consolidation

For more information concerning the "Revisioning Collection Management" process, including access to data, collection analyses, FAQs, and guides to accessing materials through alternative sources, please visit:

https://lib.usf.edu/collections-and-discovery/revisioning/

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