USF Libraries' Budget Realignment Strategy

Revisioning Library Services & Collections

USF Sarasota-Manatee Library Services

- USF Sarasota-Manatee pays a cost-share for electronic resources. However, the Tampa budget cuts have a direct "trickle down" effect on USF Sarasota-Manatee.

USF Libraries Budget Overview (Tampa Campus)

Budget Overview

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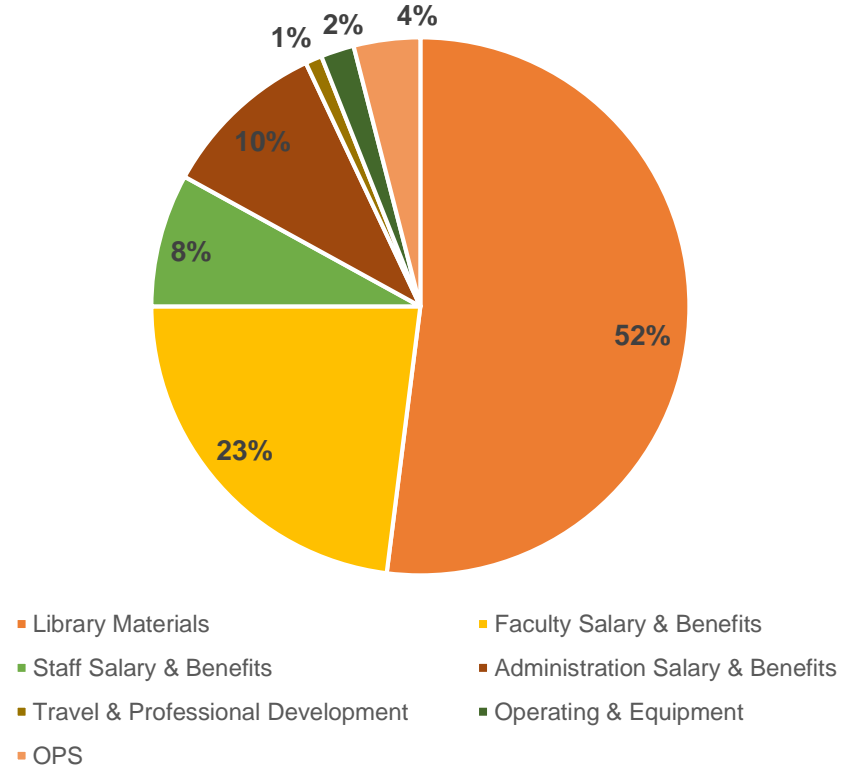
Discretionary funds to support program changes (content or level) and faculty/student demand are no longer available.

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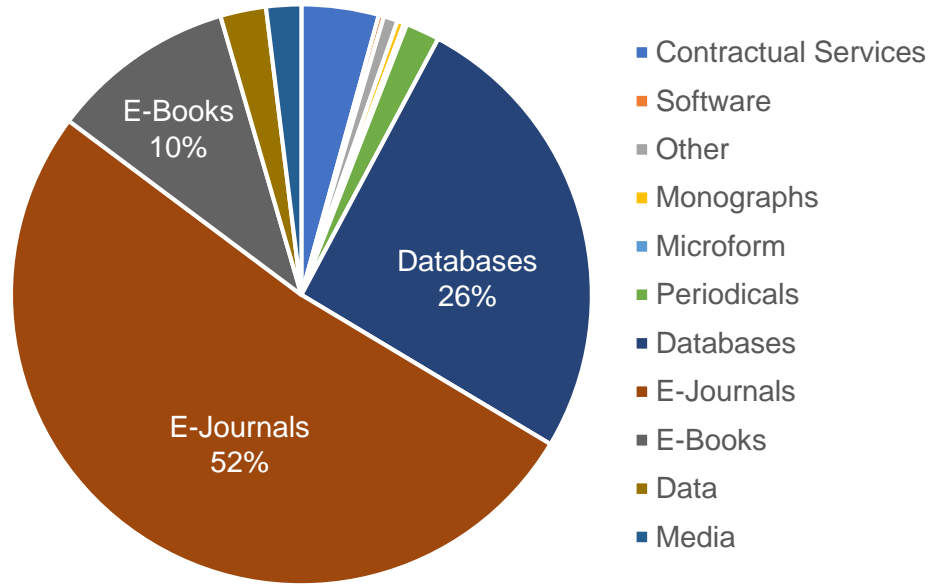
Library staffing is well below state peers and ARL target metrics.

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

Pie chart legend:
- Contractual Services
- Software
- Other
- Monographs
- Microform
- Periodicals
- Databases
- E-Journals
- E-Books
- Data
- Media

Pie chart labels: E-Books 10%, Databases 26%, E-Journals 52%

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**

Pie chart:
- **Collections** 79%
- **Vacant Rate** 14%
- **Tools & Memberships** 7%
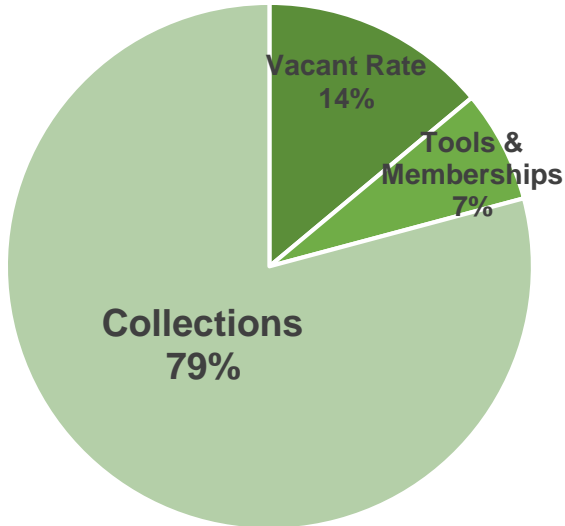
1

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.
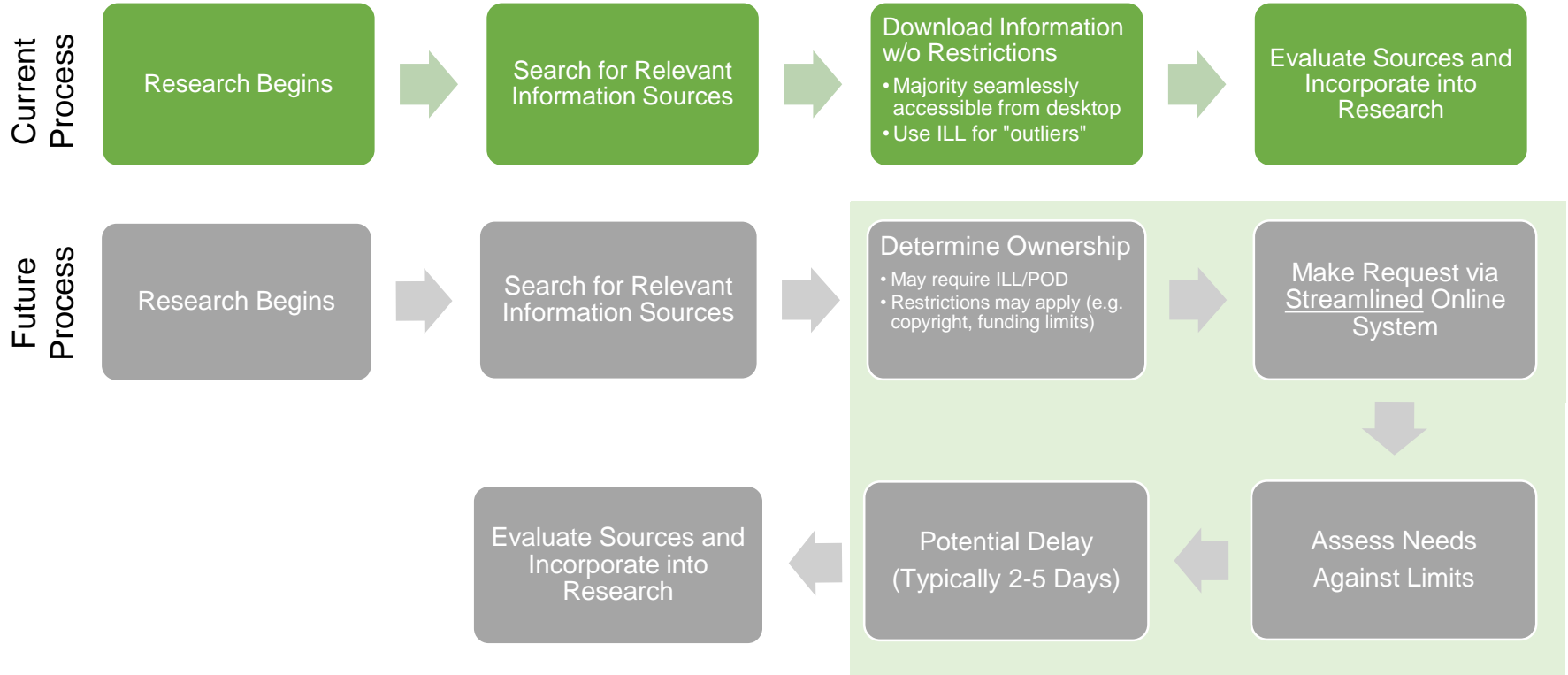
3

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.
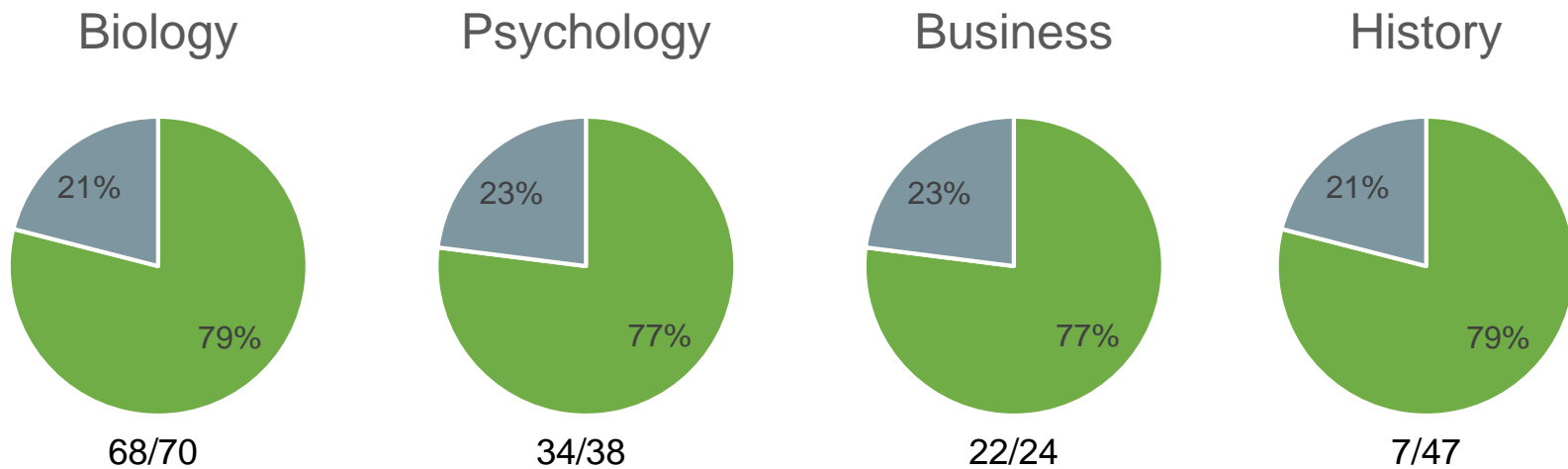
4

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 Streamlined Online System

↓

Assess Needs Against Limits ← Potential Delay (Typically 2-5 Days) ← Evaluate Sources and Incorporate into Research

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Anticipated Impact on Research

Biology	Psychology	Business	History
21% / 79%	23% / 77%	23% / 77%	21% / 79%
68/70	34/38	22/24	7/47

Availability of articles via OA, aggregators, and permanently owned content.

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

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Shifting to Meet Faculty Needs At This Time: At USF Sarasota-Manatee

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

Q & A

Segue to Jessica:

- Speak about Strategic Directions for the USF Sarasota-Manatee Library Services

Strategic Directions for USF Sarasota-Manatee campus Library Services (DRAFT)

USF Libraries:

- To support the strategic goals of the University of South Florida, the **consolidated USF Libraries** will achieve a level of excellence supporting our aspiration to become a member of the Association of Research Libraries (ARL).

USF Sarasota-Manatee:

- The **Information Commons and Library Services at the USF Sarasota-Manatee campus** partners with faculty, academic, and student units across campus to teach students information literacy and research skills, as well as coordinate loans of essential technology tools and library resources/ course reserves.

- Additionally, the Sarasota-Manatee librarian provides specialized data, research, and collections services in support of Sarasota-Manatee campus faculty and student research, impact, and visibility.

Strategic Directions for USF Sarasota-Manatee campus Library Services (DRAFT)

- Three directions:
1. Develop Distinctive Collections
2. Enhance Service Models
3. Increase Research Contributions

Strategic Directions for USF Sarasota-Manatee campus Library Services (DRAFT)

Direction 1: Develop Distinctive Collections

- *Develop and promote distinctive and deeply curated research collections of demonstrated value to institutional and global research communities*

  - 1.1. Expand and promote local interlibrary loan and document delivery capabilities to ensure comprehensive access to vital research.

  - 1.2. Expand the USF Libraries institutional repository to include Sarasota-Manatee campus faculty by promoting and facilitating the creation of faculty research profiles in the USF Libraries ScholarCommons, thus increasing faculty research visibility and impact.

Strategic Directions for USF Sarasota-Manatee campus Library Services (DRAFT)

Direction 2: Enhance Service Models

- *Establish a service profile employing emerging methodologies and digital tools to deliver a) innovative, high-impact support for discipline-based and multidisciplinary research among faculty and graduate students and b) efficient, high-impact support for undergraduate student success*
  - 2.1. Implement and promote One USF Libraries resources and services in order to enhance USF Sarasota-Manatee library services.
  - 2.2. As part of the university's strategic realignment and changes post-consolidation, complete a needs assessment or environmental scan of faculty to uncover areas in need of further local library support.
  - 2.3. Cultivate existing collaborative partnerships with campus stakeholders, in order to foster an inclusive and welcoming space within the Information Commons; collaboratively develop diverse and inclusive programming inspired by library holdings.

Strategic Directions for USF Sarasota-Manatee campus Library Services (DRAFT)

Direction 3: Increase Research Contributions

- *Increase the volume and impact of research contributions to the profession*
  - 3.1. As a faculty librarian, submit one peer-reviewed article or equivalent publication per year.

In order to achieve these directions, additional staffing support within Library Services & Information Commons will be prioritized.

- Library Specialist recently hired.
- Replacement of OPS and hiring new student workers is a priority for 2021.

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/