



USF / LIBRARIES

REDEFINING TRADITION
ANNUAL REPORT 2018-19



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About the USF Libraries

The University of South Florida Libraries has been driving student and faculty success from the moment the doors opened in 1956 – doors that continue to open for thousands of USF patrons seeking high-quality research materials, secure and comfortable study spaces, and expertise in subjects ranging from archival research to copyright and intellectual property to data management. John Allen, USF's founding president, referred to the Library as “the heart of the University,” and confirmed his sentiment by making his first academic staff appointment the Director of the Library, Elliott Hardaway, in 1957. Hardaway described his philosophy for providing quality library service:

“Bricks, books, and brains, these are the *sine qua non* of good library service. Nor can any one of these factors be neglected. No one or two of these ingredients will give good library service. It takes all three.”

In the 21st century, “bricks, books, and brains” continue to serve as the foundation for exceptional library service and, although our investments now overwhelmingly focus on deploying a technology-intensive information ecosystem, our commitments to student success and faculty impact persist. The USF Libraries has anticipated the rapid change in librarianship through recently concluded and planned facility renovations, curation of digital collections and data, innovative tools, and services delivered by interdisciplinary research teams and librarians.

Driven by our goal to become eligible for membership in the prestigious Association of Research Libraries (ARL) and inspired by USF’s recent Preeminent designation, the USF Libraries redefines tradition by anticipating and exceeding emerging expectations. As is true in any established academic library, we continue to acquire and support an extensive selection of print and electronic books, maps, journals, databases, and audio/video content – and our traditional Digital Collections house nearly 63,000 objects. This strategy continues to serve us, but it is no longer sufficient on its own to achieve the level of excellence that we seek.

In efforts to expand our services and resources and create globally-accessible collections and learning tools, we launched the Digital Heritage & Humanities Collections (DHHC) initiative in 2016. The DHHC coordinates the use, training, and implementation of innovative 3D and spatial technologies that enhance teaching, research, and analysis across multiple disciplines on all USF campuses. The DHHC employs advanced approaches to 3D research and curriculum development that address real-world challenges. By using this technology, they not only create unique collections of objects, monuments, and sites – which are often imperiled – but also provide new opportunities for preservation, education, and research.

To complement our traditional library service model, focused on research assistance and promotion of information literacy, we established the Research Platform Teams (RPTs). The RPT “model creates a series of librarian-led teams tasked with establishing deep relationships with faculty and graduate students in either an academic department or disciplinary cluster to provide targeted, focused, collaborative services that emphasize active participation (as opposed to support) in research, grants, teaching, and publication.”¹ Regardless of their area of focus, each RPT is invited to draw upon support from across the library, thereby obtaining expertise for such



endeavors as collection and data management, Geographic Information Systems (GIS) and spatial analytics, intellectual property and citation impact, and publication strategies and copy editing. The inaugural RPT serves the USF School of Geosciences, made up of a team including a librarian with graduate training in the environmental sciences and a doctoral candidate who specializes in Geosciences Education. A second team, launched later in 2017, serves the Department of History and classics concentration, with current searches underway for teams serving the Muma College of Business and the digital humanities.

An emerging, imperative concern affecting student success is the deleterious role of increasing educational costs. The USF Libraries’ Textbook Affordability Project (TAP) deploys multiple solutions to address this complex problem by increasing faculty awareness to significantly reduce the costs of course materials for students. The TAP team redefines tradition by providing access to textbooks through print and online resources at the Libraries, significantly reducing costs, demonstrating the value of the Libraries’ contributions to institutional goals.

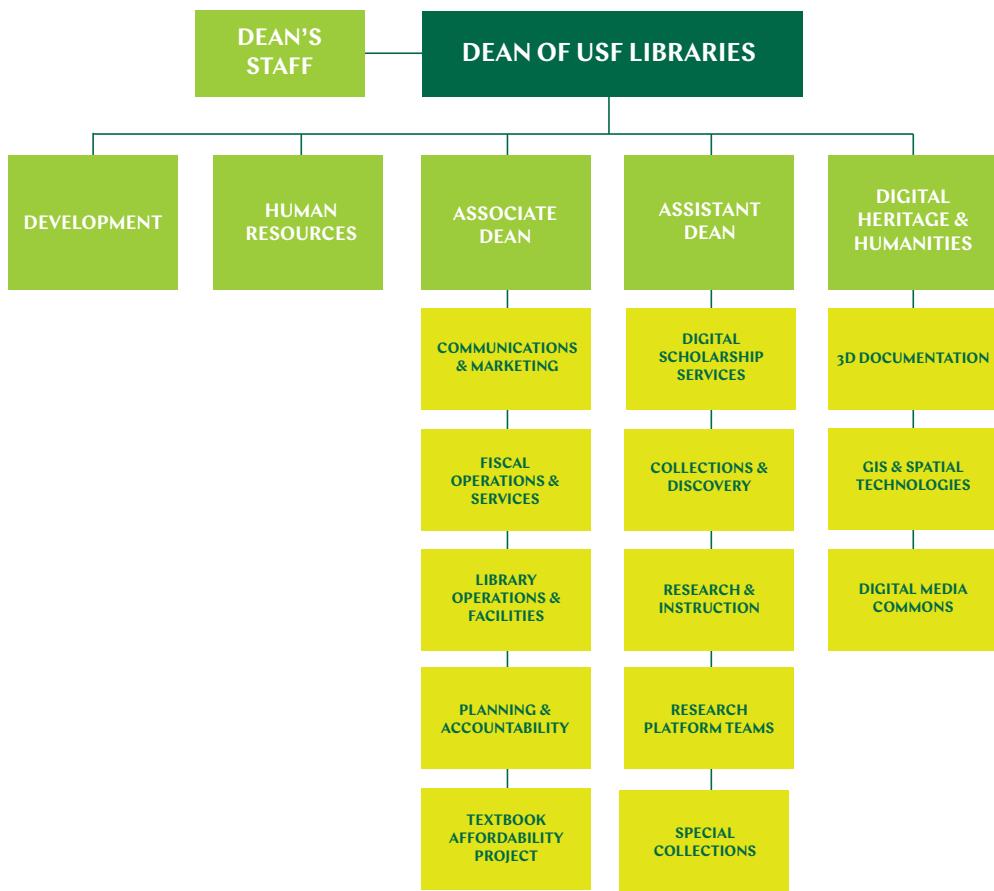
Our collective mission is to **inspire research, creativity, and learning** by connecting the USF community to relevant and high-quality information. We envision being the center of a **highly engaged university community**, driven to produce high-impact research and nourish creativity. We value the **discovery** of information using tools that satisfy intellectual curiosity and promote innovation in research and teaching, **creativity** in an inclusive environment with the freedom and resources to work towards a vision of the future, and **connection** with the tools necessary to share the results of research with both the local community and the world, and to measure its impact.

“It is important that a library should count as its collection not the books on its shelves but the people it serves. This point of view is central in the philosophy of the University of South Florida. A library is good or great, not because of the volumes it has, but because it is used by people who derive personal benefit from its use and who produce something as a result of its use that will benefit civilization.”

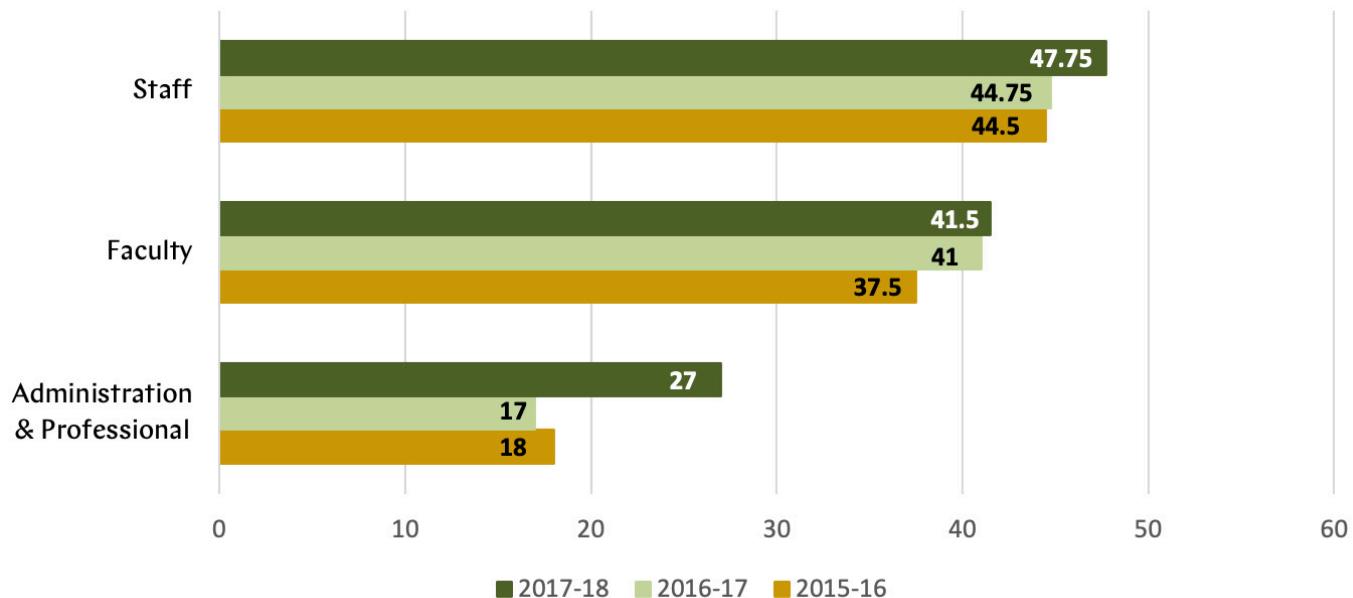
—Bulletin of the University of South Florida. Summer 1961. Accent on Learning 1961-63.

¹ Allen, Maryellen; Chavez, Todd. (2018). The University of South Florida Libraries’ Evolving Service Model: From ROLES to Research Platform Teams. *Research Library Issues*, no. 294: 31–38. <https://doi.org/10.29242/rli.294.4>.

Organization



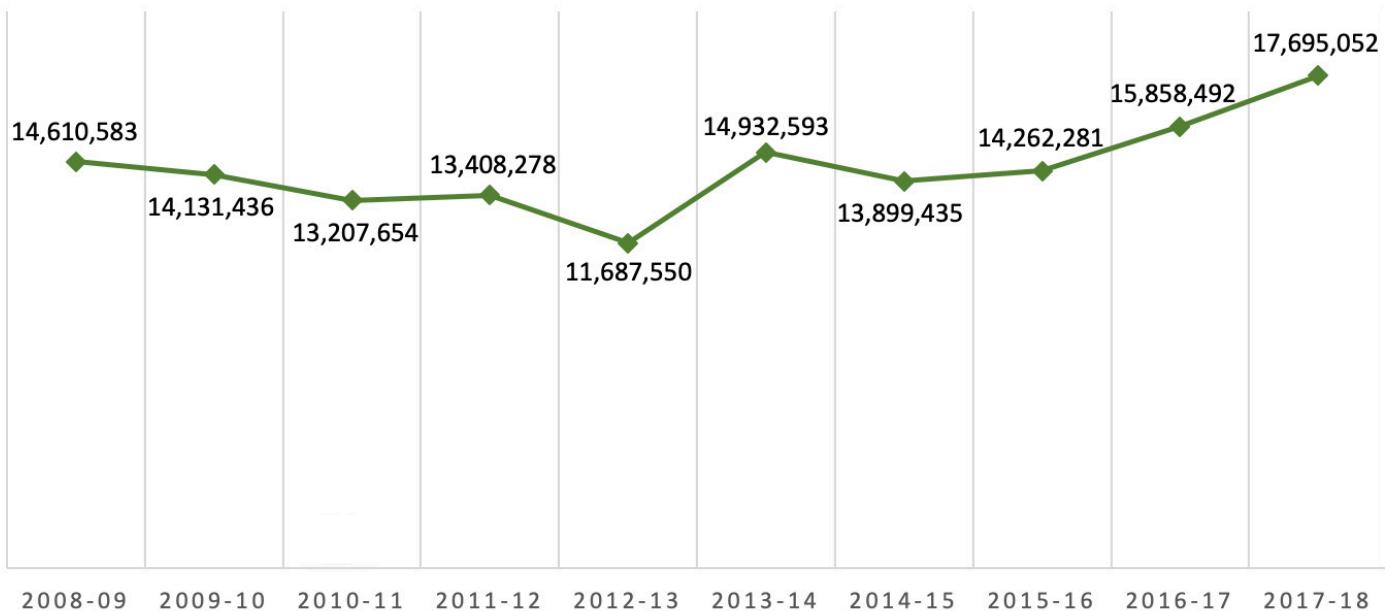
Staffing Overview



Financial Overview

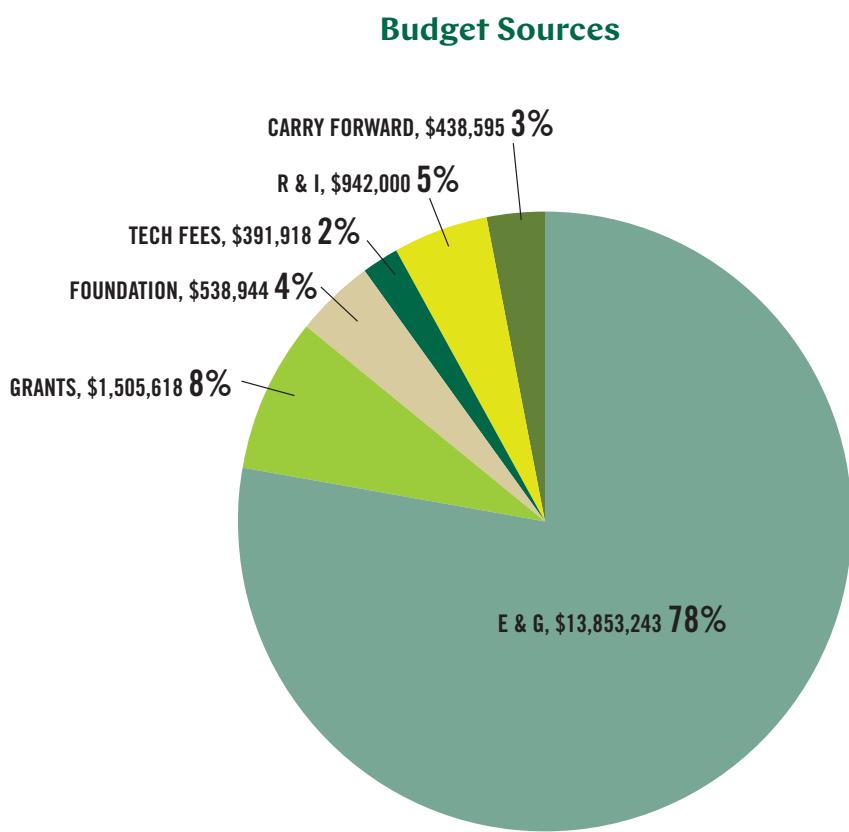
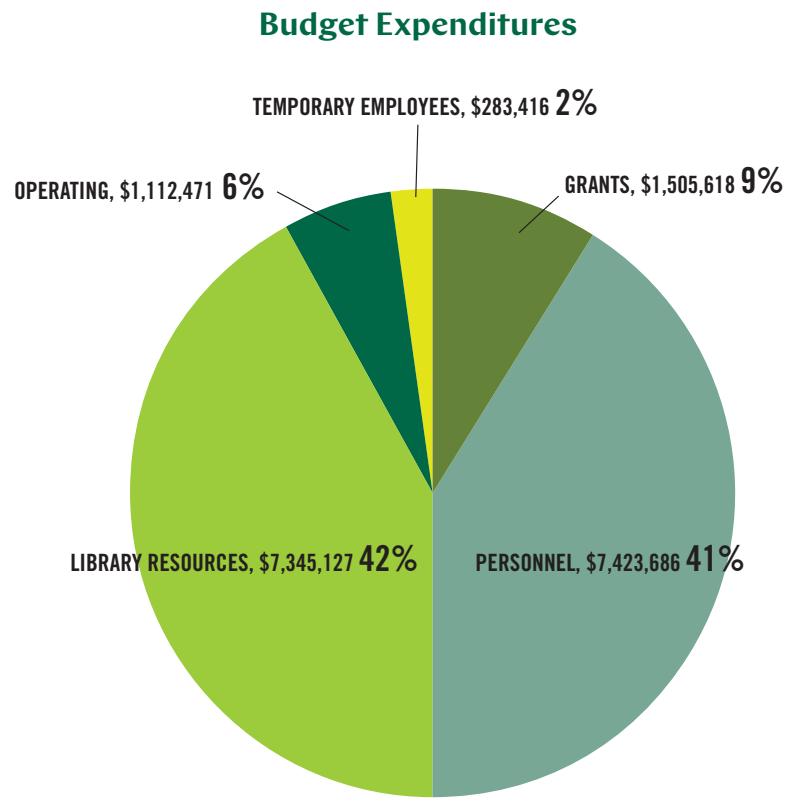
In recognition of its importance as the gateway metric that anchors the Association of Research Libraries' (ARL) "Expenditure Focused Index," we begin with an overview of total library expenditures (TLE). Since 2015, we have employed a wide range of strategies to increase expenditure levels in support of high-quality collections and services.

TOTAL LIBRARY EXPENDITURES



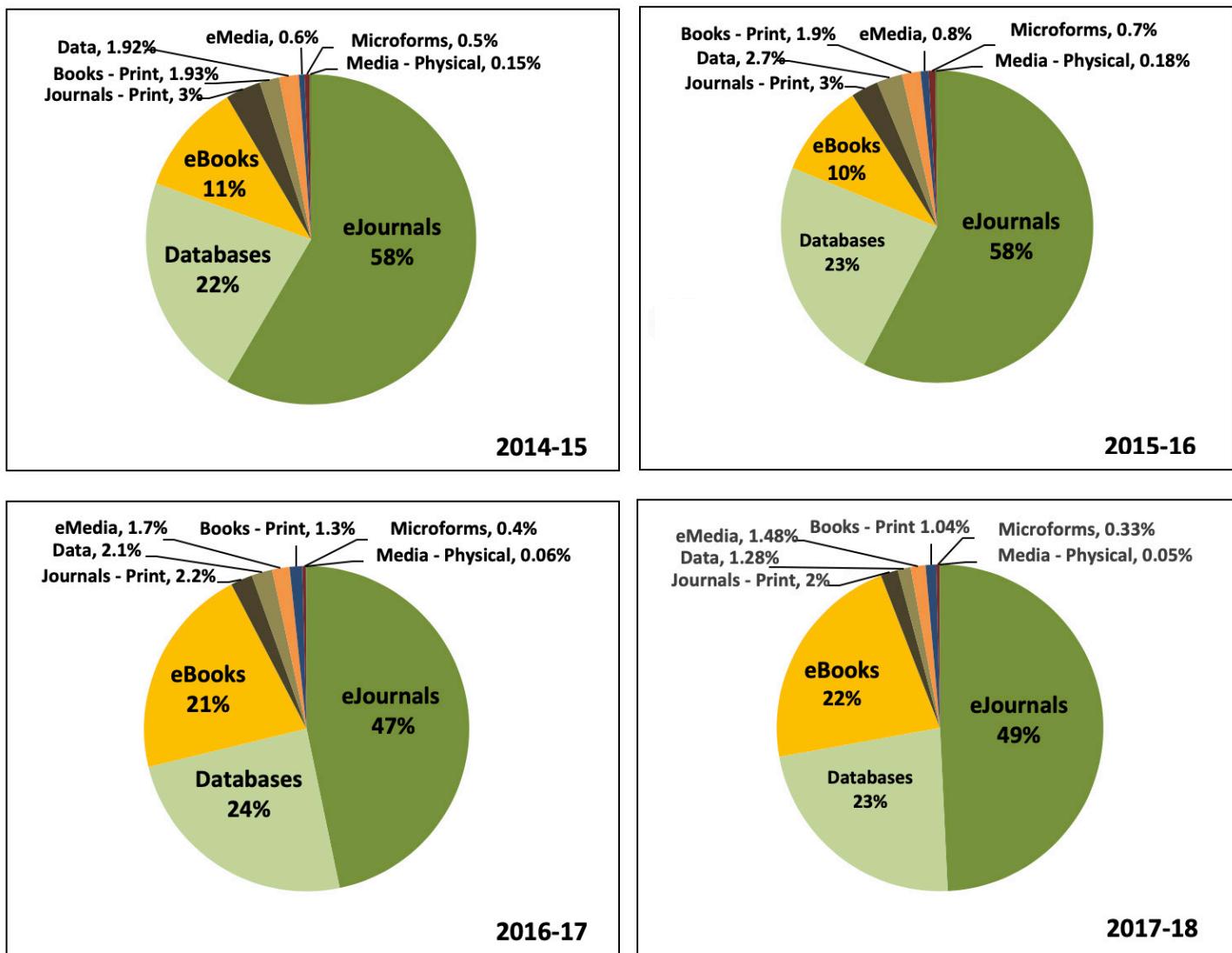
LIBRARY

All Source Budget Expenditures FY19, \$17,670,318



Materials Expenditures

The following charts reflect the distribution of library materials expenditures by format for the period of 2014-15 to 2017-18.



Based on an examination of the period of 2014-15 to 2017-18 of library materials expenditures, 82% of the library's annual materials budget is used to continue subscriptions to databases, journals, data packages, microforms, and eMedia. The remaining 18% of the budget is used to acquire monographs (print and digital) and physical media. The distribution of expenditures is an obstacle to strategic acquisition of materials that can serve as collections of distinction and to build out or establish new collections to support emerging areas of research.

Current Initiatives

Digital Heritage & Humanities Collections (DHHC)



Digital Heritage & Humanities Collections (DHHC) initiative uses 3D imaging and spatial technologies to digitally preserve heritage at three scales: landscapes, sites, and objects. Through creation of collections and digital learning tools, they bridge the natural, biological, and social sciences. The DHHC team ventures into the field using terrestrial laser scanning, photogrammetry, specialized imaging, drone-based mapping, and GIS to create immersive heritage experiences through virtual/augmented reality and 3D modeling.

With projects around the globe, the DHHC team has deep partnerships with the USF School of Geosciences and the Department of Anthropology, the Tampa Bay History Center, the National Park Service, and the Department of Defense. Projects include digital documentation of the Castillo de San Marcos and Fort Matanzas in St. Augustine, Florida, and the sites of the Mercury and Apollo space complexes at Cape Canaveral. Using 3D imaging, the team has digitally preserved shipwrecks, national monuments throughout the U.S., the Haghpat Monastery in Armenia, and bas-relief stone sculptures at the archaeological site of Chalcatzingo in Morelos, Mexico. These efforts not only document important heritage sites around the world, but provide tools for conservation, research, and learning.

The USF Libraries established a **GIS program** in 2000 to ensure system-wide access to GIS and other spatial technologies that drive 21st century learning and research. With the launch of the DHHC initiative, the Libraries' GIS program evolved beyond the earlier access-only focus to include active partnerships in externally funded projects, expertise-building workshops, and research collection development (rolling out in Fall 2019). The Libraries' workshops support students and faculty using GIS and other spatial technologies, and offer opportunities to explore research applications of remote sensing, mapping, and cartography.

As part of their on-campus mission, the DHHC team operates the **Digital Media Commons (DMC)**, a state-of-the-art technology and learning center that supports the teaching and learning of the tools and methods the DHHC team deploys in the field. Students and faculty have access to high-end PCs, specialized software, and a studio for video, photography, and virtual/augmented reality applications, as well as access to equipment and other digital production tools that can be checked out. Technical workshops and micro-credentialing (rolling out in Fall 2019) signal levels of competency that can then be used in seeking employment. One-on-one consultations provide intensive training in the latest techniques in digital production, 3D technologies, and specialized imaging and round out the DMC's extensive service portfolio.

Research Platform Teams (RPTs)

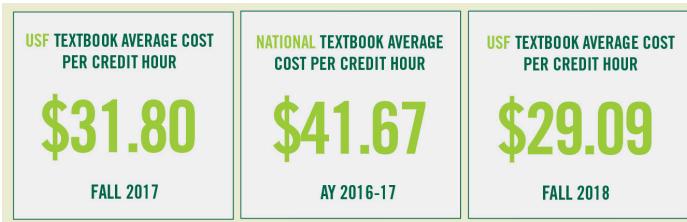


Technology enhancements, pedagogical shifts, programmatic shifts, and new and more sophisticated approaches to research productivity and impact are driving the evolution of academic libraries. Research and learning across institutions are becoming more team-based, more interdisciplinary, and increasingly dependent on complex and varied data sources. To meet these and other challenges, the USF Libraries are investing in an innovative path to partner with faculty through **Research Platform Teams (RPTs)**.

RPTs are librarian-led teams that transform collaboration into partnership. With the primary focus on faculty and graduate students, this team approach integrates expertise in library and information science with deep subject knowledge or functional expertise to build a customized "platform" from which the target audience can advance their research goals. The RPT model transforms most aspects of library operations and complements our

current focus on undergraduate student success. The program's launch drew upon existing expertise in the geosciences, history, and classics with two additional teams in recruitment to focus on business and the digital humanities.

Textbook Affordability Project (TAP)



Textbooks and other course materials are expensive, and their rapidly increasing cost has proved to be a barrier to student success. According to the Florida Virtual Campus 2018 Student Textbook and Course Materials Survey:

- 64.2% of students reported not purchasing a required textbook
- 42.8% took fewer courses (depressing progress to a degree)
- 35.6% reported earning a lower grade (because they were without the required textbook)

In 2011, the USF Libraries launched the **Textbook Affordability Project (TAP)** to create solutions that lower costs and ensure that all students have access to course materials.

By elevating faculty awareness and deploying a range of different tools to build solutions to this very complex challenge, the TAP team and its collaborators have saved students over \$18 million dollars. The team's cost-effective approach to the challenge is recognized for its excellence at the statewide level, with many institutions modelling their approaches after those pioneered by the TAP team. Campus-wide participation in TAP-proposed solutions has had a major impact on affordability at the credit hour level too: Cost per credit hour has dropped from its high in Fall 2017 of \$46.15 to \$29.09 in Fall 2018 (the national average is \$41.67).



Collections Profile

General Collections

Collections Profile, AY 2017-18	Tampa	Shimberg	TOTALS
Monograph Titles (all formats)	2,667,393	15,660	2,683,053
Monograph Volumes (print + eBooks)	2,390,269	121,625	2,511,894
Microforms	892,331	0	892,331
eBooks	716,653	4,366	721,019
eJournals (titles)	64,318	732	65,050
Media (physical)	53,221	38	53,259
Media (electronic)	37,121	3	37,124
Databases	918	23	941
Print Journals (titles)	432	0	435

Notable Special Collections

Florida Environmental Collections: Emerging collection of distinction that currently includes primary source materials concerning ornithological research, karst environments, marine resources, and conservation

Florida Studies & Local History: Extensive collections covering the Tampa Bay region and its relationship with the Caribbean, with particular strengths in the history of Ybor City and the immigrant experience

Children's and Young Adult Literature: Over 25,000 volumes covering historical and contemporary children's and young adult literature

LGBT Collections: Monographic and archival collections supporting research on the LGBT experience internationally, with an emphasis on LGBT history, culture, politics, and community relations throughout the Tampa Bay region

Digital Research Collections

The DHHC team will release a series of high-quality digital research collections beginning in Spring/Summer 2019. The initial roll-out will include collections documenting the digital heritage assets of the Mercury and Apollo launch sites at Cape Canaveral, Ybor City ("Tampa Through Time"), and a third collection to be determined with input from partners being compiled as of this writing. The timeline of release from this point forward is as follows:

AY 2019-20	4-6 Collections of Distinction
AY 2020-21	4-6 Collections of Distinction
AY 2021-22	4-6 Collections of Distinction
AY 2022-23	6-8 Collections of Distinction
AY 2023-24	6-8 Collections of Distinction

Service Portfolio

The USF Libraries possess a varied and rapidly evolving service portfolio that is delivered by organizational entities defined primarily by their target audience. In the following overview, services accompanied by a date will be launched or expanded by that designation; all other services are currently deployed.

Library Student Success Department (Focus: Undergraduate Students)

- Research Consultations
- Reference Assistance
- Instruction Sessions
- Assignment Planning and Development
- Create/Maintain Instructional Materials
- Video/Module Content Design
- Research Guide Design
- Citation Management Support
- Collection Development Referrals
- Library Orientations
- Curriculum/Collection Integration (AY 2020-21)

Research Platform Teams (Focus: Graduate Students and Faculty)

- Research Collaboration
- Teach Credit-Bearing Courses
- Grant Support
- Subject Expertise (Masters Level+)
- Data Analytics and Statistics (Fall 2019)
- AR/VR Design
- 3D Visualization
- Research Workshops
- GIS and Spatial Analytics (Expanding AY 2019-20, AY 2021-22)

Special Collections (Focus: Students, Faculty, and Community)

- Primary Source Materials
- Rare Materials
- Research Assistance
- Primary Source Material Instruction
- Archives and Records Management

Digital Scholarship Services (Focus: Graduate Students and Faculty)

- Scholarly Communications/Repository Services
- Copyright /IP Services (Expanding AY 2022-23)
- GIS Site License Management
- OA Publishing and Textbooks
- Conference Hosting Platform
- Data Management (Expanding AY 2019-20)
- Digitization/Content Reformatting
- Research Programming (AY 2019-20)
- Citation Impact Services (AY 2020-21)
- Infographic/Graphic Design (AY 2021-22)
- Copyediting (AY 2021-22)
- Web Services for Grant-Funded Research (AY 2022-23)

Collections & Discovery Services (Focus: Students, Faculty, and Community)

- Collection Acquisition/Management
- Metadata and Linked Data Services
- Resource Sharing/ILL

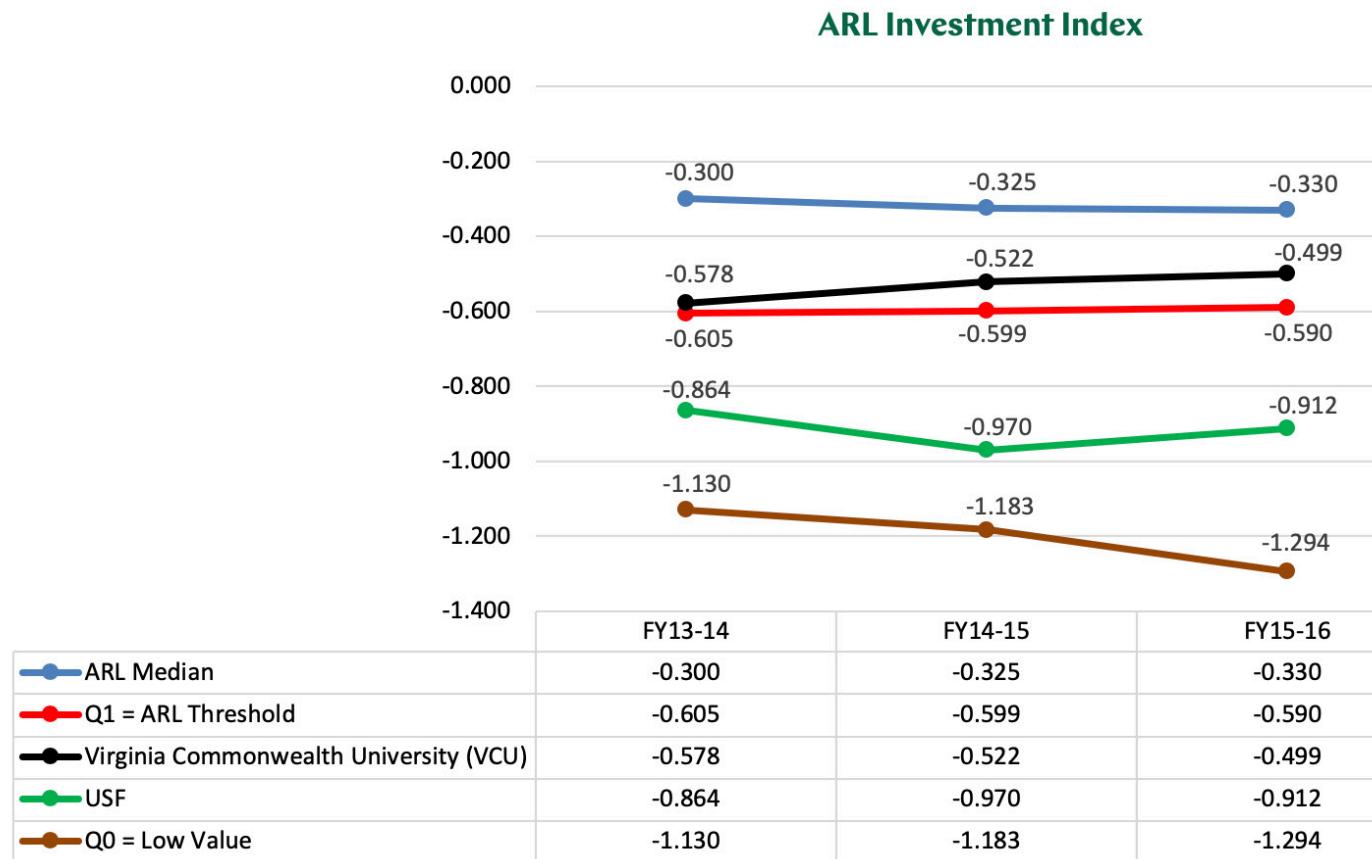
Progress Toward ARL Membership

Membership in the Association of Research Libraries (ARL) is the focus of the USF Libraries' goals and objectives. Membership is granted to the institution in recognition of their libraries' contributions to the scholarly environment in several dimensions: breadth and quality of collections and services, leadership in the profession and across the institution, and innovation. The institution's profile is another important component of the membership decision: ARL libraries support institutions emphasizing research and doctoral level graduate instruction.

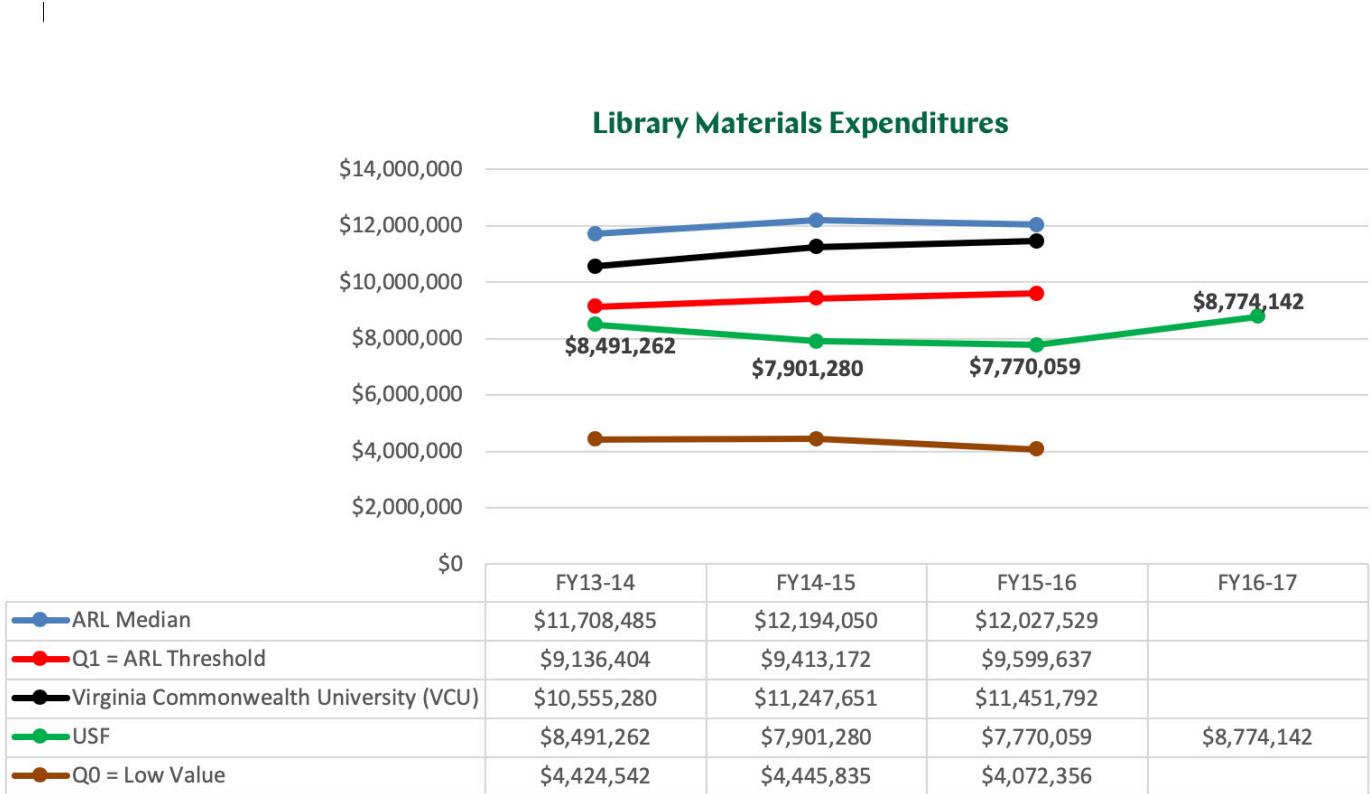
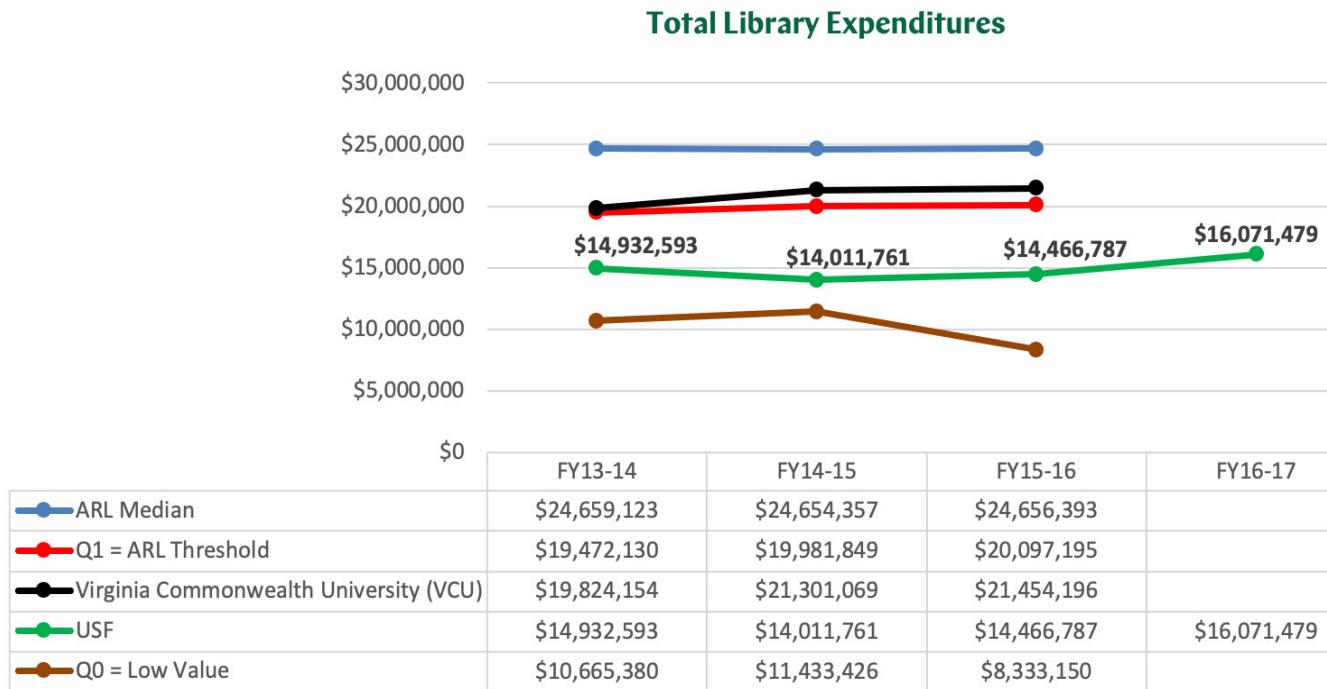
The process of membership evaluates three primary criteria:

- similarity of the parent institution to ARL institutions;
- similarity of size as determined by a factor analysis of data describing the library's collections, staffing, and financial support; and
- collections of distinction.

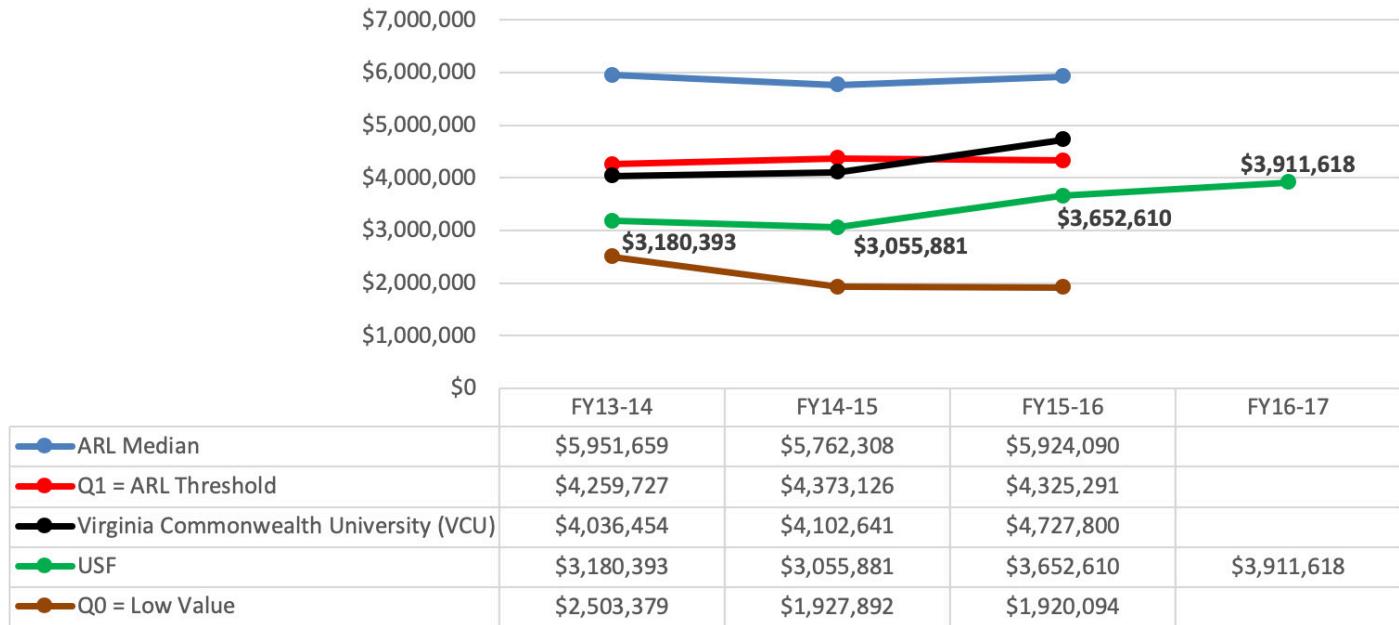
The ARL Investment Index is used to benchmark the libraries' fitness for a more comprehensive assessment of its qualification for ARL membership. It is the gateway. As the 125th and most recent ARL member, Virginia Commonwealth University (VCU) has been added to the analysis.



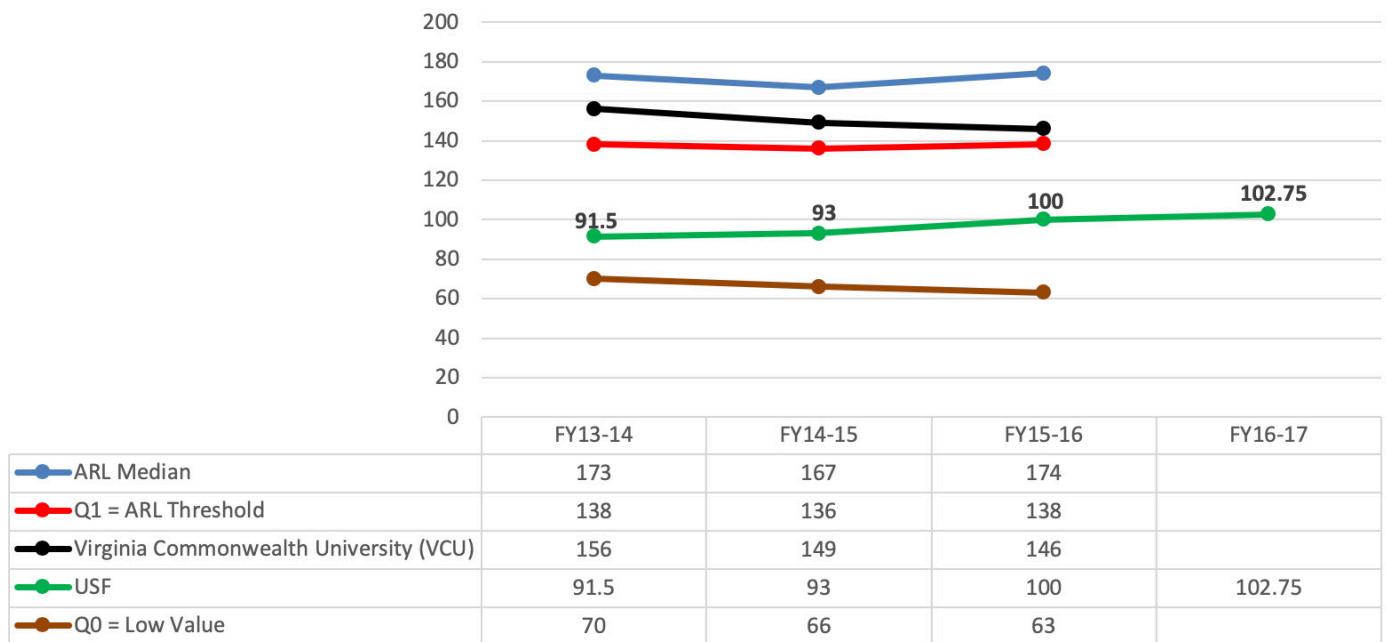
The Investment Index is derived through principal component analysis of four variables. The values for those variables for the ARL median, the Q1, VCU, and the low value are contained in the following charts.



Professional Staff Salaries



Total Professional & Support Staff FTE



Select Rankings for the ARL Investment Index, 2015-16

Rank Order	Institution Name	Index Score
3	MICHIGAN	2.4571
7	PENNSYLVANIA STATE	1.5996
8	CALIFORNIA, BERKELEY	1.5596
10	CALIFORNIA, LOS ANGELES	1.4488
12	TEXAS	1.2641
13	TEXAS A&M	1.0443
15	ILLINOIS, URBANA	0.9804
16	OHIO STATE	0.9572
20	WASHINGTON	0.7949
21	MINNESOTA	0.7875
23	VIRGINIA	0.6515
24	INDIANA	0.6463
25	NORTH CAROLINA	0.5303
26	RUTGERS	0.4759
29	MICHIGAN STATE	0.3310
30	IOWA	0.3223
32	WISCONSIN	0.2670
33	PITTSBURGH	0.1842
37	ARIZONA	0.0764
38	CALIFORNIA, SAN DIEGO	0.0451
39	FLORIDA	0.0449
43	PURDUE	-0.0658
44	MARYLAND	-0.0725
66	COLORADO	-0.4479
74	IOWA STATE	-0.4987
	VIRGINIA COMMONWEALTH UNIVERSITY (VCU)	-0.4991
77	CALIFORNIA, IRVINE	-0.5337
78	CALIFORNIA, DAVIS	-0.5405
79	SUNY-BUFFALO	-0.5433
80	FLORIDA STATE	-0.5460
86	KANSAS	-0.5909
90	OREGON	-0.6469
92	CALIFORNIA, SANTA BARBARA	-0.6687
96	MISSOURI	-0.7167
99	GEORGIA TECH	-0.7644
100	SUNY-STONY BROOK	-0.8049
105	AUBURN	-0.9122
	USF	-0.9123
106	LOUISIANA STATE	-0.9554

All of the public AAU institutions listed in the “AAU Book” host ARL libraries. This table provides a rank order list of those institutions with their investment Index Score. Three exceptions, depicted in red text, include the Virginia Commonwealth University (VCU) and the institutions that border USF: Auburn and Louisiana State. VCU, Auburn, and Louisiana State are not AAU institutions. Auburn and Louisiana State were listed because they fall immediately before and after USF if we were admitted today.

The University of Florida and Florida State University are shaded for the reader's convenience. In the following tables, the lists focus on the “ARL Threshold” (Q1) value for each of the variables used to calculate the Investment Index. As in the case of the index score list, the institutions immediately bordering USF if we were to be admitted today are set off in red text. They are not public AAU Institutions.

The variable coefficient values are based on the 2015-16 formula (most recent available).

Total Library Expenditures		
39	FLORIDA	\$31,617,448
	VIRGINIA COMMONWEALTH UNIVERSITY (VCU)	\$21,454,196
80	FLORIDA STATE	\$20,599,073
92	CALIFORNIA, SANTA BARBARA	\$20,305,398
90	OREGON	\$19,760,899
96	MISSOURI	\$18,420,190
99	GEORGIA TECH	\$17,141,026
100	SUNY-STONY BROOK	\$15,616,048
103	CASE WESTERN RESERVE	\$14,843,510
	USF	\$14,466,787
105	AUBURN	\$14,396,353

Q1 = \$20,097,195

UF, FSU, and VCU are above the Q1 value for this variable but are included for context.

Expenditures on library materials and salaries (variables 2 and 3 respectively) are added to the values in this variable.

Variable coefficient = 0.809

Library Materials Expenditures		
39	FLORIDA	\$13,762,452
	VIRGINIA COMMONWEALTH UNIVERSITY (VCU)	\$11,451,792
80	FLORIDA STATE	\$10,410,115
38	CALIFORNIA, SAN DIEGO	\$10,067,069
100	SUNY-STONY BROOK	\$9,120,709
99	GEORGIA TECH	\$9,044,584
96	MISSOURI	\$8,614,783
105	AUBURN	\$8,174,930
	USF	\$7,770,059
104	WATERLOO	\$7,567,201
92	CALIFORNIA, SANTA BARBARA	\$5,812,069

Q1 = \$9,599,637

UF, FSU, and VCU are above the Q1 value for this variable, but are included for context.

Variable coefficient = 0.134

Professional Staff Salaries		
39	FLORIDA	\$6,315,540
80	FLORIDA STATE	\$5,724,348
	VIRGINIA COMMONWEALTH UNIVERSITY (VCU)	\$4,727,800
66	COLORADO	\$4,535,193
92	CALIFORNIA, SANTA BARBARA	\$4,040,168
110	GUELPH	\$3,720,922
	USF	\$3,652,610
98	NEBRASKA	\$3,600,582
99	GEORGIA TECH	\$3,478,323
96	MISSOURI	\$3,132,897

Q1 = \$4,325,291

UF, FSU, and VCU are above the Q1 value for this variable but are included for context.

Variable coefficient = 0.066

Professional & Support Staff FTE		
39	FLORIDA	280
92	CALIFORNIA, SANTA BARBARA	177
80	FLORIDA STATE	171
66	COLORADO	165
	VIRGINIA COMMONWEALTH UNIVERSITY (VCU)	146
96	MISSOURI	138
99	GEORGIA TECH	111
106	LOUISIANA STATE	105
	USF	100
108	CALIFORNIA, RIVERSIDE	93

Q1 = 138

UF, FSU, and VCU are above the Q1 value for this variable but are included for context.

Variable coefficient is not meaningful.

Risks

Risk 1: Flat/Reduced Resourcing

Over 50% of the budget allocated to the USF Libraries supports acquisition of or access to electronic resources that are essential for faculty productivity and faculty and student success. Unavoidable, contractually obligated cost increases occur annually (typically 4.3 - 5.7%). Flat/reduced resourcing has traditionally been managed by internal personnel reductions in lieu of cuts to library resources. A different utility service model for managing cost increases should be employed to avoid future risk to the libraries' contributions, as well as our charge to achieve eligibility for membership in the Association of Research Libraries (ARL) – similar to that employed by the University of Georgia and Virginia Commonwealth University Libraries.

Mitigation of this risk is wholly dependent on sufficient understanding of the impacts of resourcing on faculty and student success and research productivity, and a dedicated effort to collaborate around a model to address inevitable pressures on library resource (e.g. collections) funding. Fundraising, developing revenue through external funding, and other strategies are being employed, but they should be considered sources of supplemental funding for excellence as opposed to part of a sustainment budget.

Risk 2: Changes in Vision

The phenomenal success of the University of South Florida over a 20-year period is the result of sustained and disciplined focus aimed at achieving excellence in dimensions that are relevant to USF's faculty, students, and communities. We are not dependent on a traditional model to sustain our trajectory; we have defined and adopted a USF path that is right for our experience. This strategy must be employed in the post-consolidation USF Libraries. We now possess a roadmap to achieve membership eligibility in ARL and, over a four-year period, have established a strong "can-do" service posture that contributes to Preeminence, Performance Based Funding, and institutional rankings – this vision must be sustained and given space to evolve. Rapid modifications of that vision will disrupt and potentially derail progress. The results of a recent "USF Libraries' All-Staff Program Alignment Response Survey" indicate a strong level of consensus among the respondents for this path. Mitigating this risk requires continuous process improvement internally, and systematic review of the vision through external comparisons with ARL member libraries.



Select Faculty Accomplishments

PUBLICATIONS

Abresch, John; Pascual, Laura; Langhurst Eickholt, Andrea. (2017). EBA in Practice: Facilitating Evidence-Driven E-Book Programs in Both Consortium and Individual Library Settings. *Proceedings of the Charleston Library Conference*.

Abresch, John. (2017). USF Library's Experiences with Facilitating Several PDA E-Book Acquisitions Program. *Proceedings of the Charleston Library Conference*.

Boczar, Jason; Roh, Charlotte; Schlosser, Melanie; Collins, Nina; Cummings-Sauls, Rebel; Fishel, Terri; . . . Thomas, Camille. (2018). An Ethical Framework for Library Publishing, Version 1.0. *Atlanta, GA: Educopia*.

Collins, Lori; Doering, Travis; Penders, Thomas. (2018). Digital Strategies to Preserve Our Nation's Space History – Cape Canaveral Air Force Station. *Florida Anthropological Society Conference*.

Collins, Lori. (2018). Terrestrial LiDAR. In *The Encyclopedia of Archaeological Sciences eMRW*.

Doering, Travis; Collins, Lori; Schwadron, Margo. (2018). Heritage at Risk: How 3D Spatial and Imaging Tools are Helping Managers and Researchers Better Preserve, Protect, and Interpret the Castillo de San Marcos and Fort Matanzas. *Florida Anthropological Society Conference*.

Doering, Travis. (2014). Mesoamerica in the Pre-Classic Period: Early, Middle, Late Formative. In *Encyclopedia of Global Archaeology*.

Dold, Claudia J.; Reid, William Michael. (2018). Burns, Senge, and the Study of Leadership. *Open Journal of Leadership*, 7, 89-116.

Mi, Xiying; Pollock, Bonita. (2019). Ebooks for the Classroom+ at the University of South Florida Libraries: A Case Study of Database Management. *Journal of Web Librarianship*.

Pascual, Laura. (2018). Creating and Marketing Textbook/OER Programs. *Against the Grain*, 30(5), 28-30.

Powers, Audrey. (2018). Teaching Research Outside the Classroom: A Case Study and Assessment. *Art Documentation: Journal of the Art Libraries Society of North America*, 37 (2), 241-252.

Schmidt, LeEtta. (2018). The Invisible Employee: Success and Fragility of Automating Interlibrary Loan. *Journal of Interlibrary Loan, Document Delivery & Electronic Reserve*, 26:3-5, 181-192.

Taylor, Tomaro; Griffin, Melanie. (2018). Employing Analytics to Guide a Data-Driven Review of LibGuides. *Journal of Web Librarianship*, 12:3, 147-159.

PRESENTATIONS

Abresch, John. (2018, November). *Using a Community of Practice Approach to Transform: How an Academic Library Collections Unit Reorganized to Meet Growing Demands for E-Resources and Services During a Time of Institutional Change*. Juried Poster session presented at Charleston Conference, Charleston, SC.

Ariew, Susan; Cunningham, Nancy. (2018, May). *Collaborate, Teach and Travel: Librarians and Study Abroad*. Presentation at LOEX Annual Conference, Houston, TX.

Dold, Claudia J.; Jayousi, Rashid. (2018, July). *When So Much Information is Available for Free on the Internet, Does the World Still Need Libraries?* Paper presented at the 4th annual meeting of the Conference on Electronic Publishing, Amman, Jordan.

Knight, Matthew. (2018, June). *D'éireannaighibh an Baile Móir Seo: The Irish Department in the Monitor of San Francisco, 1888-1893*. Presentation at the International American Conference for Irish Studies, Cork, Ireland.

Knight, Matthew. (2018, June). *Shifting Environments in the Archives: Creating an Online Dion Boucicault Collection at the University of South Florida*. Presentation at the International American Conference for Irish Studies, Cork, Ireland.

Lewis, Barbara. (2018, October). *History, Heritage, & Hope: A Virtual Exhibit*. Presentation at the Bucknell University Digital Scholarship Conference, Digital Scholarship: Expanding Access, Activism, and Advocacy, Lewisburg, PA.

Mi, Xiying; Bernardy, Richard. (2018, October). *Reliving the Past: Digital Library Facilitates Access to Archaeological Data*. Presentation at the Digital Library Federation Forum, Las Vegas, NV.

Pascual, Laura. (2018, March). *Textbook Affordability: Driving Organizational Change in Academic Library*. Presentation at the ER&L Conference, Austin, TX.

Pollock, Bonita; Mi, Xiying; Falato, Brian. (2018, November). *From the Winter of Messy Data into the Spring of Standardization: eBook Vendor Data Re-envisioned*. Presentation at the Charleston Conference, Charleston, SC.

Powers, Audrey; Jacobs, Stephanie. (2018, November). *Spring Forward: Collaborating to Build and Assess a Collection of Learning Objects*. Presentation at Charleston Conference, Charleston, SC.

AWARDS & RECOGNITION

Chavez, Todd. (2019). External reviewer appointment on the Southern Association of Colleges and Schools (SACS) Accreditation Committee.

Dold, Claudia J. (2017-2018). Fulbright U.S. Scholar. “Partnering with University Faculty in Palestine to Enhance their Culture of Scholarship.”

Knight, Matthew. (2019, Spring). Awarded Professional Development Leave.

Schmidt, LeEtta. (2019). First winner of the Reference and User Services Association (RUSA) Sharing and Transforming Access to Resources Section (STARS) Publication Recognition Award.

Taylor, Tomaro. (2018). Received the USF Department of Anthropology’s Friend of Anthropology Award.

EXTERNAL FUNDING

Collins, Lori; Travis Doering. (2018-2019). Received eight external awards totaling \$726,857.

Appendix I:

Path to ARL (May 2018)



USF LIBRARIES

THE PATH TO
ARL

UNIVERSITY OF SOUTH FLORIDA

MAY 23

2018

USF LIBRARIES
UNIVERSITY OF SOUTH FLORIDA

PUBLIC AAU INSTITUTIONS & ARL

"Membership is based on the research nature of the library and the **parent institution's aspiration and achievements as a research institution**. The parent institution's accomplishments are established by the classification **Research Universities (high or very high)** as reflected by the current Carnegie Classification ... and published by the Carnegie Foundation for the Advancement of Teaching, **membership in the Association of American Universities**, or by comparable affiliations or documentations."

-- Principles of Membership in the Association of Research Libraries (2013)

INSTITUTION NAME	ESTABLISHED	ARL (1932)	AAU (1900)	INSTITUTION NAME	ESTABLISHED	ARL (1932)	AAU (1900)
University of California, Berkeley	1868	1932	1900	Michigan State University	1855	1956	1964
University of Michigan	1817	1932	1900	University of Colorado Boulder	1876	1964	1966
University of Wisconsin-Madison	1848	1932	1900	University of Maryland, College Park	1856	1962	1969
University of Virginia	1819	1932	1904	University of Oregon	1876	1962	1969
University of Illinois at Urbana-Champaign	1867	1932	1908	University of California, Los Angeles	1919	1937	1974
University of Minnesota	1851	1932	1908	University of Pittsburgh	1787	1962	1974
University of Missouri	1839	1932	1908	University of California, San Diego	1960	1973	1982
Indiana University Bloomington	1820	1932	1909	The University of Arizona	1885	1967	1985
The University of Iowa	1847	1932	1909	University of Florida	1853	1956	1985
The University of Kansas	1865	1932	1909	Rutgers University-New Brunswick	1766	1956	1989
The Ohio State University	1870	1932	1916	The State University of New York at Buffalo	1846	1967	1989
University of North Carolina at Chapel Hill	1789	1932	1922	University of California, Santa Barbara	1944	1973	1995
University of Texas at Austin	1883	1932	1929	University of California, Davis	1905	1969	1996
University of Washington	1861	1932	1950	University of California, Irvine	1965	1981	1996
Iowa State University	1858	1932	1958	Stony Brook University	1957	1975	2001
<i>Pennsylvania State University</i>	1855	1962	1958	Texas A&M University	1876	1962	2001
Purdue University	1869	1956	1958	Georgia Institute of Technology	1885	1983	2010

USF & ARL TRANSFORMED

ARL PAST

ARL Library Index Favored Large Physical Collections

Focused on Collections of Distinction as “Scholarly Destinations”

Emphasized Building Cadre of Librarians

Emphasized Collections Over Investment in Facilities

Emphasized “Knowledge Service Provider” Role

Specific Disciplines Formed the Organizing Principle

USF PAST

Institutional Culture Not Aligned with the *ARL Library Index*

Focus on Building/Purchasing Physical Collections

Emphasized Building Cadre of Librarians

Emphasized Collections Over Investment in Facilities

Emphasized Passive Service Role

Specific Disciplines Formed the Organizing Principle

ARL PRESENT

ARL Investment Index Favors Innovation Impacting Research & Education

Focus on Global Access to Collections of Distinction

Emphasis shifting to Librarian-Functional Specialist Collaborations

Transforming Facilities into Learning/Research Spaces

Engagement in Full Life-Cycle & Activity Range of Knowledge

Disciplinary Labels are Weakening

USF PRESENT & FUTURE

Emphasis on Innovation Impacting Research & Education Aligns with the *ARL Investment Index*

Focus on Global Access to USF Created Collections of Distinction

Launching Librarian-Specialist Research Teams

Transforming Facilities into Innovative Learning/Research Spaces

Engagement in Full Life-Cycle & Activity Range of Knowledge

Disciplinary Labels Are Replaced by Entrepreneurial Researchers

RESEARCH PLATFORM TEAMS

GRANT SUPPORT

Project Management	Statistical Analysis (R)
Data Management	AR/VR Development & Research
Broader Impacts	Fiscal Services
Web Design/Support	Human Resources
Social Media Strategies	Metadata Development

PUBLISHING

Publishing Strategies	Copyright/IP Services
Open Access Options	Data Preservation
Impact Management	Repository Services
Infographic Design	Publication Design/Layout
Storyboards/Storymaps	Social Media Impacts

RESEARCH

Collections	Drone Operations
Program Analysis	GIS Research & Analysis
Visualization Services/3D	Data Management
Impact Management	Statistical Analysis
Web GIS & Story Journals	

TEACHING

Course Instruction (SCH)	GIS Workshops
Collection Integration	Data Analytics
Curriculum Development	Research Methods Training
Digital Technologies Training	Transferable Skills Training

TOTAL LIBRARY EXPENDITURES COMPARISON

USF (ALL CAMPUSES)

PUBLIC AAU

FLORIDA PUBLIC
RESEARCH UNIVERSITIES

FLORIDA PUBLIC RESEARCH UNIVERSITIES	ARL YEAR	TOTAL LIBRARY EXPENDITURES 2015-16
University of Florida	1956	\$ 31,617,447
Florida State University	1962	\$ 22,047,244
University of South Florida	N/A	\$ 17,627,428
Florida International University	N/A	\$ 17,042,935
University of Central Florida	N/A	\$ 14,710,601
Florida Atlantic University	N/A	\$ 7,964,240

PUBLIC AAU INSTITUTION

ARL
(1932)
TOTAL LIBRARY
EXPENDITURES
2015-16 FY

University of Michigan	1932	\$74,702,421
Pennsylvania State University	1962	\$59,242,593
University of California, Los Angeles	1937	\$58,114,938
University of California, Berkeley	1932	\$55,984,751
University of Texas at Austin	1932	\$52,916,981
The Ohio State University	1932	\$47,357,887
University of Illinois at Urbana-Champaign	1932	\$47,304,323
Texas A&M University	1962	\$46,860,833
University of Washington	1932	\$44,407,936
University of Minnesota	1932	\$43,705,622
University of Virginia	1932	\$42,110,533
Indiana University Bloomington	1932	\$41,276,553
University of North Carolina at Chapel Hill	1932	\$39,810,165
Rutgers University-New Brunswick	1956	\$39,609,942
Michigan State University	1956	\$35,657,445
University of Wisconsin-Madison	1932	\$35,306,184
The University of Iowa	1932	\$34,759,938
University of Pittsburgh	1962	\$32,791,499

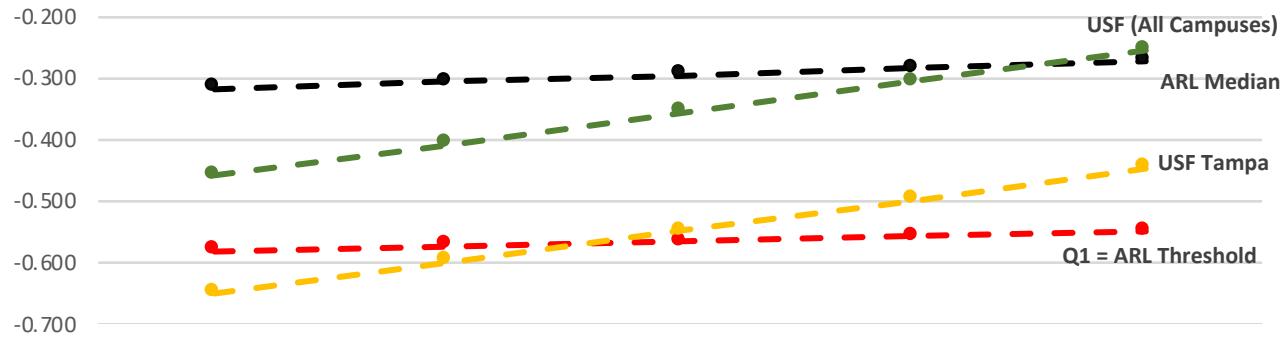
PUBLIC AAU INSTITUTION

ARL
(1932)
TOTAL LIBRARY
EXPENDITURES
2015-16 FY

University of California, San Diego	1973	\$32,395,074
The University of Arizona	1967	\$31,702,671
University of Florida	1956	\$31,617,448
University of Maryland, College Park	1962	\$28,977,173
Purdue University	1956	\$28,635,073
University of Colorado Boulder	1964	\$22,486,420
University of California, Irvine	1981	\$21,607,732
Iowa State University	1932	\$21,293,162
University of California, Davis	1969	\$21,164,572
The State University of New York at Buffalo	1967	\$20,605,760
The University of Kansas	1932	\$20,383,677
University of California, Santa Barbara	1973	\$20,305,398
University of Oregon	1962	\$19,760,899
University of Missouri	1932	\$18,420,190
University of South Florida	N/A	\$ 17,627,428
Georgia Institute of Technology	1983	\$17,141,026
Stony Brook University	1975	\$15,616,048

FIVE YEAR STRATEGIC INVESTMENT PLAN

PROJECTED ARL INVESTMENT TREND: USF TAMPA & USF (ALL CAMPUSES)



	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5	TOTAL RECURRING
OPERATING/COLLECTIONS – RECURRING ENHANCEMENT						
Library Resources Annual Increase in Costs	\$175,000	\$200,000	\$225,000	\$250,000	\$275,000	\$1,125,000
Collections Strategic Investment Fund	\$100,000	\$100,000	\$100,000	-	-	\$300,000
Technology Sustainment Budget	\$80,000	-	-	-	-	\$80,000
Operating Total	\$355,000	\$300,000	\$325,000	\$250,000	\$275,000	\$1,505,000
PERSONNEL- RECURRING ENHANCEMENT						
Development Officer (1 FTE)	\$81,000	-	-	-	-	\$81,000
Librarians (18 FTE over 5 yrs.)	\$222,750	\$222,750	\$297,000	\$297,000	\$297,000	\$1,336,500
Digital/Functional Specialists (18 FTE over 5 yrs.)	\$202,500	\$202,500	\$270,000	\$270,000	\$270,000	\$1,215,000
Support Staff (20 FTE over 5 yrs.)	\$141,750	\$283,500	\$141,750	\$189,000	\$189,000	\$945,000
Personnel Total	\$648,000	\$708,750	\$708,750	\$756,000	\$756,000	\$3,577,500
TOTAL RECURRING INVESTMENT						
<i>Sustained annual investment in digital content (System Tech Fee)</i>	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$5,082,500

DELIVERABLES

YEAR 1

- + 2 Research Platform Teams
- + AR/VR Development
- + 4-6 Collections of Distinction
- + Communication/Marketing
- + Development/Fundraising Capacity
- + Spatial Analytics
- + Enhanced Grant Contributions

YEAR 3

- + 2 Research Platform Teams
- + Statistical Analysis & Research Design
- + 4-6 Collections of Distinction
- + Curriculum/Collection Integration
- + Faculty Impact Management Services
- + Repository Services
- + Academic Success (Librarian)

YEAR 5

- + 2 Research Platform Teams
- + Academic Program Analysis
- + 6-8 Collections of Distinction
- + Web Services for Grants
- + Enhanced Spatial Analytics
- + Research Drone Capacity
- + Copyright/IP Services
- + Archives Capacity

YEAR 2

- + 2 Research Platform Teams
- + Data Management Capacity
- + 4-6 Collections of Distinction
- + Research Programming
- + Enhanced GIS Capacity
- + Strategic Social Media Program
- + Academic Success (Librarian)

YEAR 4

- + 2 Research Platform Teams
- + Storyboard/Storymap Design
- + 6-8 Collections of Distinction
- + Data Analytics (Spatial)
- + Infographic/Publication Design
- + Digital Technologies Training
- + Copyediting

**FIT FOR ARL MEMBERSHIP
IMPROVED AAU PROFILE
SOLIDLY PREEMINENT**

Appendix II:

The University of South Florida Libraries' Evolving Service Model: From ROLES to Research Platform Teams

Allen, Maryellen; Chavez, Todd. (2018). The University of South Florida Libraries' Evolving Service Model: From ROLES to Research Platform Teams. *Research Library Issues*, no. 294: 31–38. <https://doi.org/10.29242/rli.294.4>.

The University of South Florida Libraries' Evolving Service Model: From ROLES to Research Platform Teams

Maryellen Allen, Director of Academic Services, University of South Florida Libraries

Todd Chavez, Dean, University of South Florida Libraries

Responding to the profession-wide challenge to articulate the value and impact of academic library programs, the University of South Florida (USF) Libraries Academic Services department embarked on an ambitious exploration of the institution's need for and expectations of research and instruction services. Initiated in 2015, the study of USF's academic landscape concluded that it was time to substantively reconfigure the existing Liaison Program to meet requirements for the coming five to seven years. The Re-Imagining Our Library Engagement Services (ROLES) project began in March 2016 and teams were created to examine various aspects of the Liaison Program and to determine how the program could be re-imagined to more effectively support the research and teaching mission of the university.

In early March 2016, the assistant director for research services launched the project with a thorough exploration of the literature concerning liaison programs, and later developed a reading list of key sources to serve as a common foundation for all ROLES participants. The department's leadership team (director of academic services, the assistant director for research services, the assistant director for instructional services and the assistant director for digital learning initiatives) formulated the questions that would serve as the scaffolding for any liaison program emerging for the first time. From the initial exhaustive list, the group narrowed the questions to five areas of focus:

1. How are liaison programs in other universities structured and how do they work?
2. What are the strengths and weaknesses of the current liaison

- program at the USF Libraries?
3. What are the research and instructional needs of the faculty and students?
 4. What is the level of research in the current institutional curriculum?
 5. What quantitative data is available and which data is useful for the project?

A project leader and a Steering Committee oversaw the initiative. The Steering Committee was comprised of the librarians leading each of five teams aligned with the areas of focus. These teams included:

- **Models:** Tasked with exploring the types of liaison programs currently in use at other universities and their histories, structures, strengths, challenges, and advice to others.
- **SWOT Analysis of Liaison Program:** Tasked with identifying the current liaison model's strengths, weaknesses, opportunities, and threats (SWOT).
- **Academic Needs:** Tasked with surveying the chairs and faculty in the academic departments to determine their needs from librarian liaisons with respect to research, collections, and instructional support.
- **Curriculum Team:** Tasked with examining the syllabi of academic programs to identify the level of research present in courses and assignments.
- **Data Gathering & Analysis:** Tasked with taking stock of the university to determine degree program information (program size, number of degrees awarded, trends, etc.) and faculty information (research areas, productivity, number of faculty per program, etc.)

Team members included librarians and other professionals from all departments within the library.

USF's Liaison Model: Past and Present

When the initiative began, the USF Libraries Liaison Program would best be described as traditional. This model had been adopted decades ago when there was a large Reference Services department with over 16 librarians and more than 15 graduate assistants from the School of Information. Assignments for “bibliographic instruction,” as requested by department faculty, were blended with reference desk and collection development responsibilities. Librarians were individually assigned to academic departments based on one or more factors: librarian interests, academic background, or relationship to a faculty member in the department. In an environment with an essentially “flat” budget, declining personnel levels, and retirements over the last 11 years, this model proved unsustainable. Even as the USF Libraries’ approach to reference and instruction services transformed into a more efficient program that applied library faculty where and when they were most needed and requested, it was clear that the traditional model had provided a beneficial and recognizable “face” or brand for thousands of faculty and students. Nonetheless, everyone understood that the Liaison Program needed to be reassessed. The goals of the new model were to preserve the “high-touch” benefit of a traditional model while exploring other models that more effectively allowed librarians to meet the changing instructional and research needs of faculty and students.

After much investigation into other models and their implementation at other academic libraries, and analysis of the strengths and weaknesses of our own program, the decision was made to combine the best aspects from each of the models studied.¹ The new model for the Liaison Program would employ the strengths of the three prevailing models described in the *ROLES Models Team Final Report*.² The comprehensive new model emphasized the liaison librarian as the USF Libraries’ ambassador to the USF community, meeting university goals and departmental research needs through collaboration within and external to the USF Libraries. This new model, as described in the ROLES full final report,³ would be structured to be adaptable for future

needs and assessable in part or whole.

The Research Platform Team Initiative

In 2017, building on recommendations from the ROLES study and experiences from an earlier service model internally referred to as the Research Services & Collections unit, the dean of the USF Libraries launched a new service strategy that would take the bold recommendations articulated in the ROLES report to the next level. The Research Platform Team (RPT) model creates a series of librarian-led teams tasked with establishing deep relationships with faculty and graduate students in either an academic department or disciplinary cluster to provide targeted, focused, collaborative services that emphasize active participation (as opposed to support) in research, grants, teaching, and publication. Figure 1 provides a graphic overview of the concept. The RPTs will be complemented by an Academic Success Team of librarians with a primary focus on supporting the undergraduate student population.



Each RPT employs the combined model approach to provide departments/disciplines with expertise in librarianship (for example, collection management, research support), functional expertise (for example, data management, publication support, GIS services, intellectual property), and subject expertise derived from education at or above the master's level of accomplishment. In forming the teams, the USF Libraries' leadership is committed to providing sufficient salary levels to recruit and hire librarians possessing a minimum of a master's degree in the target discipline. Additionally, each librarian leading an RPT will be complemented with one or more functional or subject experts to ensure that the level of support will meet faculty/graduate student expectations.

Each RPT will be able to draw upon a wealth of support across the organization, including seemingly disparate areas of activity as 3-D visualization services, digitization, fiscal support, intellectual property expertise, and more. The librarian lead for each RPT will also assume responsibility for collections (including the associated materials budget resources) that are unambiguously tied to the target discipline, while collections deemed general and multidisciplinary will continue to be acquired and managed by the Collections Department. The addition of responsibility for collections extends to the USF Libraries' Special Collections holdings based on the target discipline's needs. Finally, RPT members will be expected to teach credit-bearing courses within the department/disciplinary cluster, participate in grants, and engage actively in departmental research. In summary, they will be expected to become members of their departments even to the point of physically occupying space in that department or being jointly appointed.

In short, the RPT lead effectively becomes the director/head for liaison services, collections, special collections, digitization, GIS services, etc., based on the needs and expectations articulated by the faculty and graduate students in the target disciplines. Authority, budget, and accountability will all be decentralized as the RPT coverage extends across the institutional academic ecosystem. Department directors

will exercise their leadership responsibilities through the articulation of broad goals/objectives for RPT leads and provide direct traditional oversight for the library's core functional areas (for example, cataloging, acquisitions) and shared services utilized by multiple RPTs (for example, GIS services, fiscal services, human resources). In this brave new world of decentralization, the USF Libraries leadership will focus on ensuring constant communication and careful coordination.

Conclusion

At the time of writing (May 2018), the first RPT has been launched. Led by a librarian with a graduate certificate in environmental studies and complemented by a newly hired ABD subject expert in geoscience

education, that team is focused on the School of Geosciences (including the more traditional disciplines of geology, environmental studies, and geography). Three Research Platform Teams will be in place by fall 2018. They

The department chairs and departmental faculty (geosciences, English, and history) have expressed high levels of enthusiasm for working with the library to forge a new kind of partnership centered around increased support for faculty and graduate students.

are the result of existing strong collaborative relationships with the departments and represent a translation of these relationships into a more formalized arrangement. The USF Libraries' five-year hiring plan includes 10 additional RPTs hired at a rate of two per year.

The department chairs and departmental faculty (geosciences, English, and history) have expressed high levels of enthusiasm for working with the library to forge a new kind of partnership centered around increased support for faculty and graduate students. As the discussion progressed, the chairs from the departments circled areas of Figure 1 that were most interesting to them as an indicator of their interest in,

and the importance of a service model “tailored” to specific disciplinary needs. There was no overlap in service interests. The challenge will lie in making good on each and every dimension of service we have proposed.

Acknowledgements

This was the quintessential team effort and we need to thank some colleagues for their leadership and many contributions to the final product: Jennifer Freedman (project leader), Nancy Cunningham (administrative liaison), and Steering Committee members Maryellen Allen, Susie Ariew, Jason Boczar, Bonita Pollack, Drew Smith, and Nora Wood. Many other colleagues supported the effort through contributions great and small. We thank them all.

Endnotes

1. After consulting with other institutions identified as USF peer and aspirant, three distinct models of liaison programs emerged: A traditional model, in which a librarian was assigned to liaison work for one or more academic departments; a functional model, in which librarians were assigned to specific library service categories but not to specific departments; and a subject team model, in which librarians assigned to specific departments were also organized by teams, usually based upon academic disciplines that were similar in their approach to research.
2. Andrew Smith, Kayt Ahnberg, Jennifer Friedman, Barbara Lewis, Bonita Pollock, and Susan Silver, *ROLES Models Team Final Report*, May 2, 2017, <https://drive.google.com/file/d/15mDKAFbUhtjm2-KG0HjIOSDdnXnvRYxi/view>.
3. Jennifer Friedman, Maryellen Allen, Susie Ariew, Jason Boczar, Nancy Cunningham, Bonita Pollock, Andrew Smith, Nora Wood, *Re-Imagining Our Library Engagement Services (ROLES): Final Report*

and Recommendations, May 22, 2017, <https://drive.google.com/file/d/15ylpnqPxkl9QZmN2t27fBwXltFV34X3a/view>.

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USF LIBRARIES AT A GLANCE

159 TOTAL LIBRARY STAFF

60 PROFESSIONAL STAFF

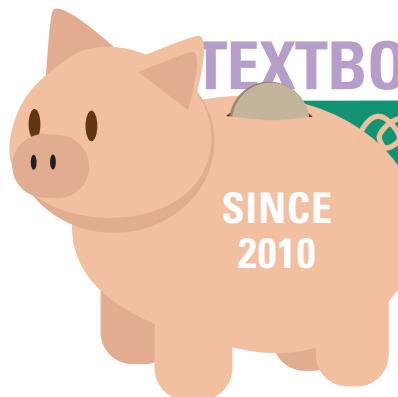
40 SUPPORT STAFF

59 STUDENT ASSISTANTS



3,736,982 DIGITAL ASSETS
ACCESSED
2,511,894 VOLUMES
97,468 SERIALS RECEIVED
941 DATABASES
19 ONLINE EXHIBITIONS

23 STUDY
ROOMS
ON 4 FLOORS
WERE USED OVER
19,191
TIMES
THIS YEAR



TEXTBOOK AFFORDABILITY

HAS SAVED STUDENTS
\$18,730,331

\$8 MILLION IN
RENOVATIONS

6TH FLOOR	
5TH FLOOR	\$825,000
4TH FLOOR	\$2,155,000
3RD FLOOR	\$175,000
2ND FLOOR	\$1,700,000
1ST FLOOR	\$1,150,000
BASEMENT	\$1,590,000


\$1,200,000
IN ELEVATOR
UPGRADES
THIS YEAR

2,683,053

TITLES IN ALL FORMATS



USF / LIBRARIES