USF Libraries' Strategic Budget Realignment

Dean Todd Chavez Briefs CAS Leadership

February 25, 2021

UNIVERSITY of SOUTH FLORIDA

Topics

Takeaways (3)

1. No one wants to do this. No one wants to do this the way that we are compelled to proceed.
   - Antithetical to our goals, ARL aspirations, and training (best practices).
   - Reverses 25-year trend of increased seamless access.
   - Inverts process of faculty input.

2. We <u>will</u> satisfy faculty information needs though the process may be delayed.
   - We have mitigation measures in place (e.g. expedited document delivery, more ILL capacity, concierge service)
   - **Cancellation** ≠ **no access**; but cancellation may delay access

3. We <u>will</u> make mistakes and we will remedy as many of those mistakes as possible during the March-May review.
   - Deadlines are too compressed; reduction target is unprecedented.

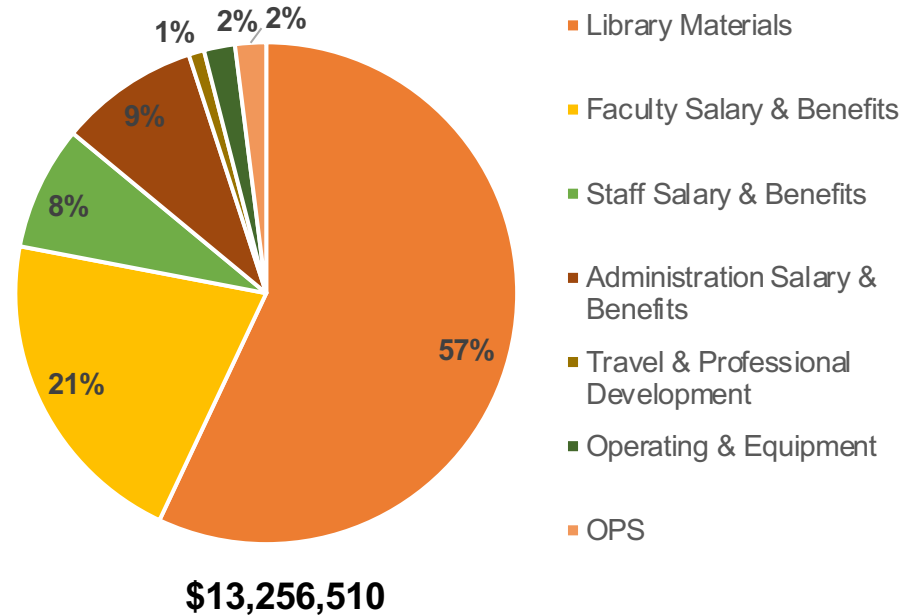# USF Libraries Budget Overview

(Tampa Campus)

Budget Overview

Library services and collections sustain the entirety of the "Architecture of Academic Excellence."

Discretionary funds to support new programs, program changes (content or level), and faculty/student demand are no longer available.

Efficiencies cannot dominate our strategy.

Pre-Realignment FY2021
E&G Base Budget Allocation

- Library Materials
- Faculty Salary & Benefits
- Staff Salary & Benefits
- Administration Salary & Benefits
- Travel & Professional Development
- Operating & Equipment
- OPS

1% 2% 2%
9%
8%
57%
21%

$13,256,510

A Word About Staffing & Efficiencies

Library staffing is well below state peers and ARL target metrics.

Significant downsizing, multiple consultancies and 15 years of continuous process improvement precede this reduction.
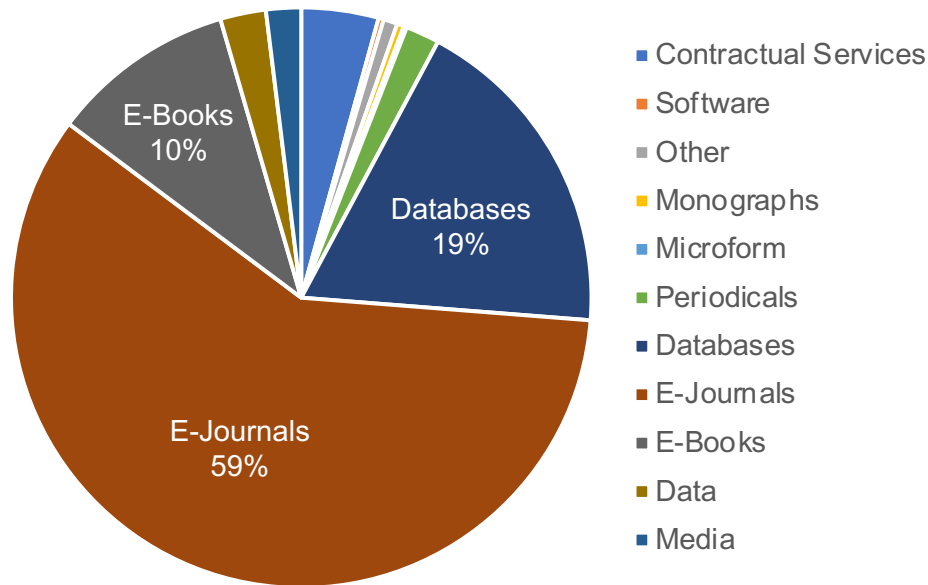
Excessive focus on efficiencies have reduced resiliency and increased risk.

Consolidation-derived efficiencies are included in this staffing profile; non-salary efficiencies offer less than $60k in savings.

Most Recent Data = 2018
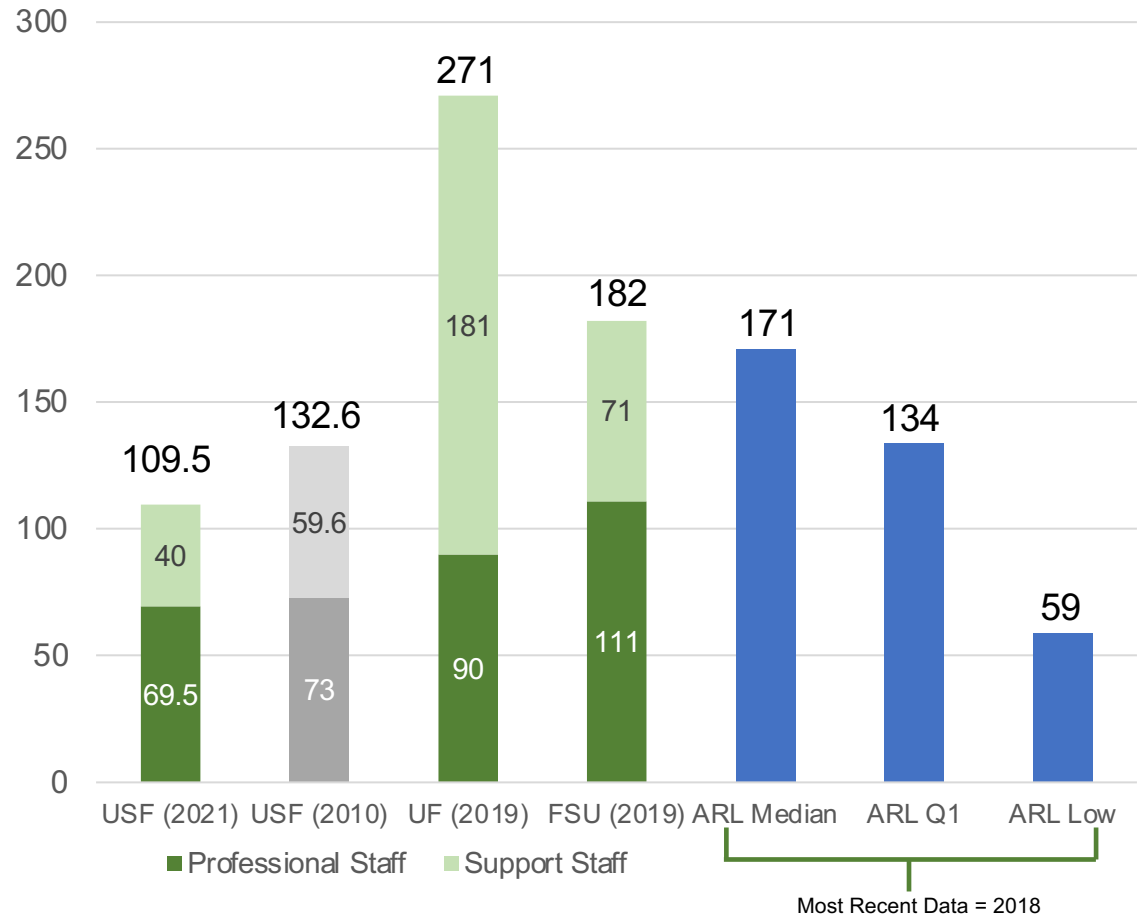
Note: USF Professional Staff include the Admin classification; groupings vary across institutions, but totals are accurate.

Anticipated Pre-Realignment Materials Budget Breakdown, FY2021

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

Pie chart labels:
- E-Books 10%
- Databases 19%
- E-Journals 59%

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

Principles & Summary of Anticipated Impacts

Our process is guided by the following principles:

- **<u>Support faculty resource needs by any means available</u>**.

- Maximize control of the USF Libraries collection budget.

- End reliance on non-recurring funding sources

- Engage faculty in the decision-making process whenever possible.

- Refocus collection expenditures on perpetual rather than leased access.
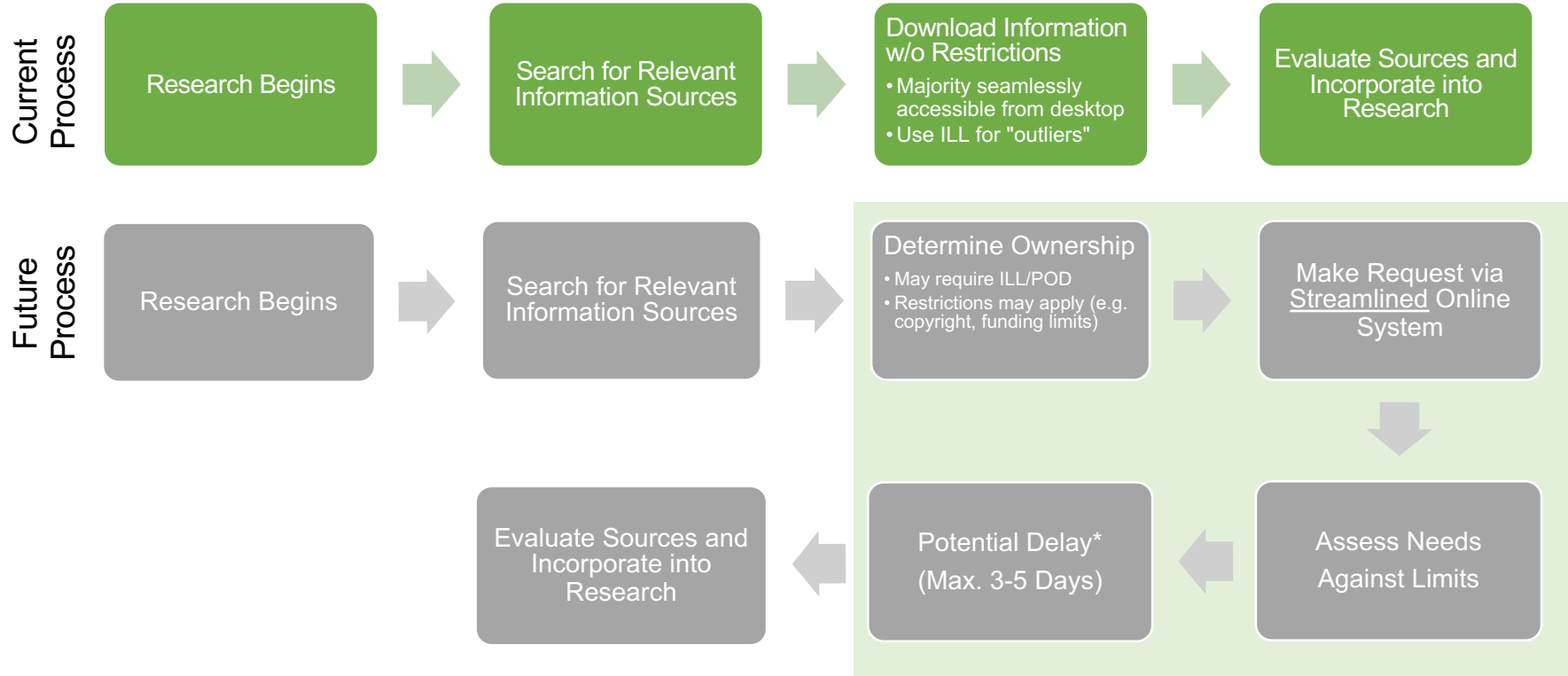
Strategic Realignment Impacts

E&G Base Budget, FY2021	$13,256,510	
Two-Year Realignment Target	- 2,033,500*	-15.3%
E&G Base Budget, FY2023	$11,223,010	
E&G Base Materials Budget, FY2021	$ 5,408,217	
Year 1 Materials Realignment	$ -1,089,500	-20.2%
Year 2 Materials Realignment	- 650,000	-12.0%
E&G Base Materials Budget, FY2023	$ 3,668,717	-32.2%

*Year 1 Materials Realignment	$ 1,089,500
Year 1 Vacant Rate	294,000
Year 2 Materials Realignment	650,000

To reach the reduction targets …

- Reduce seamless access to currently available content
- Modify and renegotiate all seven e-journal "Big Deals"
- Suspend or modify some existing services/programs to enhance ILL/document delivery capacity

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 |

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

Anticipated Impact on Research

Based on analyses of peer-reviewed article citations in a small sample of USF faculty publications from across disciplines, we estimate that 70-75 percent of those articles will continue to be available* after cancellations made necessary by the strategic budget realignment.

Although this is a worst-case estimate that will vary with the discipline, some general observations are possible.

Disciplines with a strong open-access (OA) culture fare better.

We commit to working with faculty to maximize visibility of their research and strengthen disciplinary resilience challenged by budgetary realignment through OA.

Monograph-intensive research is little impacted.

We will work to ensure that no one discipline is disadvantaged over others.

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

Mitigating the Impacts

Faculty Input - We Are Listening!

- Input received from 113 faculty (plus graduate students), some reporting on behalf of multiple faculty

- Faculty input spans 31 departments

- Specific comments on 892 unique titles

 All receive a response!

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

Building Faculty Support

Modified existing services and reallocated valued personnel.

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

Streamlined ILL / Document Delivery

Requesting Books and Articles

Three ways you can get materials:

Check USF Catalog
Please check the USF catalog before requesting materials from outside resources.

UBorrow
For faster delivery of print books from other FL colleges and universities. Search the USF Libraries Catalog and click on the Uborrow icon.

InterLibrary Loan / Document Delivery
Borrow materials from USF libraries, other libraries and have articles & chapters in the library scanned and emailed to you.

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

Click the button below to log in using your USF NetID and password. **First time users will be redirected to a registration form.**

LOGIN

Contact Us
- All USF Libraries
- Ask a Librarian

InterLibrary Loan
About Interlibrary Loan (ILL)
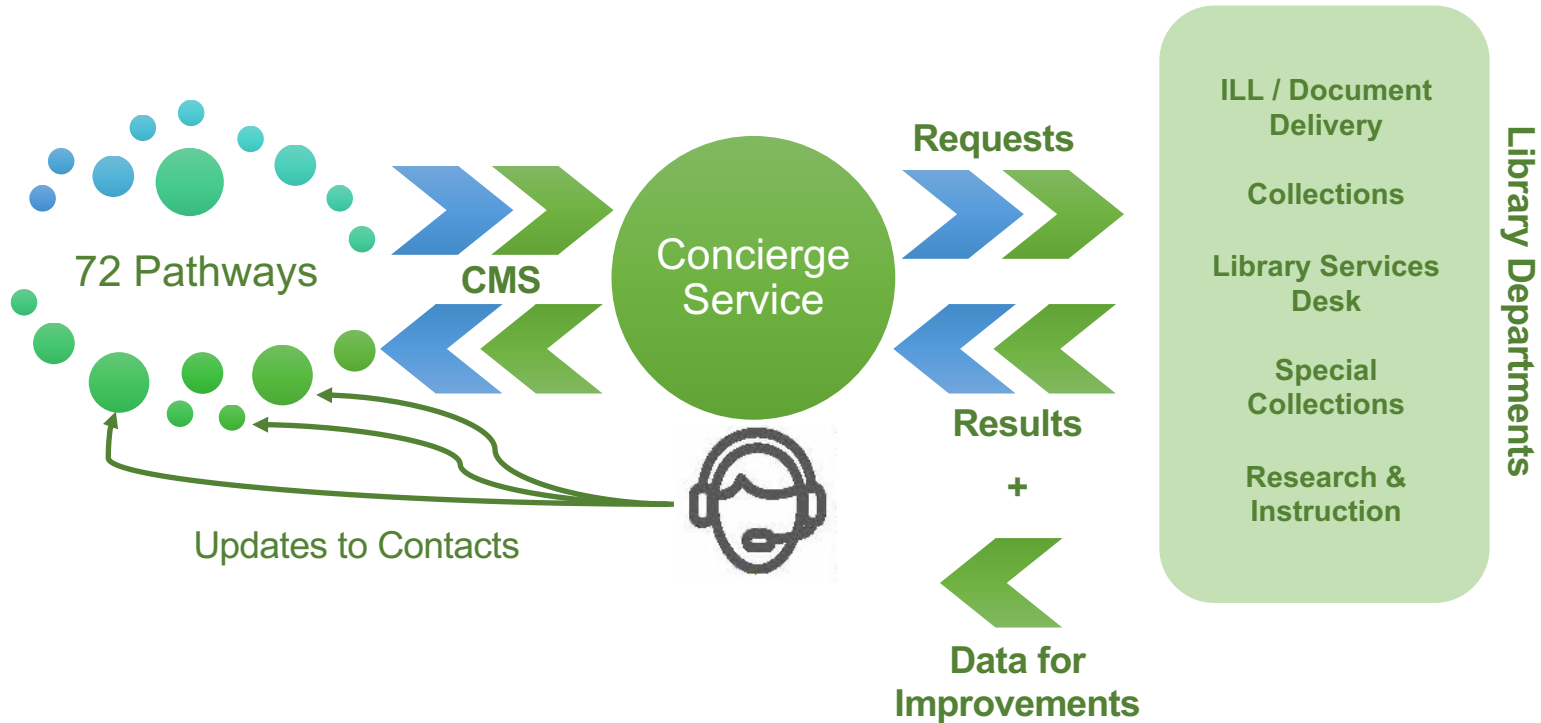Contact InterLibrary Loan
Document & Copy Services
Frequently Asked Questions
PRONTO
Services for Other Libraries

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

Expedited Document Delivery

- Modelling on UNC service following their Elsevier cancellations

- No charge to the requestor (est. $35/article for library)

- Requires faculty to select the expedited delivery option

- Exploring capacity in order to define turnaround and service hours

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/

UNIVERSITY of
SOUTH FLORIDA