USF Libraries’ Strategic Budget Realignment

COMS Faculty, March 10, 2021
Dean Todd Chavez
Topics

- Takeaways (3)
- Budget overview & realignment
target summary
- Principles, review timeline &
process
- Anticipated impacts & mitigation
- Communications update
Takeaways (3)

1. No one wants to do this.
2. We **will** 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)
   - **Non-renewal ≠ no access**; could potentially delay access
3. We **will** make mistakes and we will remedy as many of those mistakes as possible during the March-May review.
   - Deadlines are highly compressed; reduction target is unprecedented.
USF Libraries
Budget Overview & Realignment Target Summary

(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: 57%
- Faculty Salary & Benefits: 21%
- Staff Salary & Benefits: 8%
- Administration Salary & Benefits: 9%
- Travel & Professional Development: 1%
- Operating & Equipment: 2%
- OPS: 2%
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
# Strategic Realignment Summary

<table>
<thead>
<tr>
<th>Description</th>
<th>FY2021</th>
<th>FY2023</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>E&amp;G Base Budget, FY2021</strong></td>
<td>$13,256,510</td>
<td>$11,223,010</td>
<td>-15.3%</td>
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<tr>
<td><strong>Two-Year Realignment Target</strong></td>
<td>-$2,033,500*</td>
<td>-650,000</td>
<td>-20.2%,-12.0%</td>
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<tr>
<td><strong>E&amp;G Base Materials Budget, FY2021</strong></td>
<td>$5,408,217</td>
<td>$3,668,717</td>
<td>-32.2%</td>
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<tr>
<td><strong>Year 1 Materials Realignment</strong></td>
<td>-$1,089,500</td>
<td>-650,000</td>
<td>-20.2%,-12.0%</td>
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<td><strong>Year 2 Materials Realignment</strong></td>
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<td><strong>Year 1 Vacant Rate</strong></td>
<td>294,000</td>
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<tr>
<td><strong>Year 2 Materials Realignment</strong></td>
<td>650,000</td>
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*Year 1 Materials Realignment $1,089,500
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
Our process is guided by the following principles:

- **Support faculty resource needs by any means available.**
- 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.
Timeline

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

November through January
Conduct a title-by-title analysis of our recurring collection.

January through March
Enhance ILL/Document Delivery to mitigate impacts.

March through May
Review and consider next steps on non-renewed content.
Review Process

Part of the original plan, the review process will:
• run late-March through May;
• focus on non-renewed content only;
• incorporate departmental feedback on preferred reacquisition priorities; and
• budget permitting, “fix” inevitable errors.

Primary “Data” Points
1. Faculty input received during the analyses
2. Citations by USF faculty to the non-renewed titles
3. Rankings within the discipline
4. Impact on society/association (vs. commercial) publications
5. Impact across departments
Mitigating the Impacts
Research Process Impacts

Current Process

1. Research Begins
2. Search for Relevant Information Sources
3. Download Information w/o Restrictions
   - Majority seamlessly accessible from desktop
   - Use ILL for "outliers"
4. Evaluate Sources and Incorporate into Research

Future Process

1. Research Begins
2. Search for Relevant Information Sources
3. Determine Ownership
   - May require ILL/POD
   - Restrictions may apply (e.g. copyright, funding limits)
4. Make Request via Streamlined Online System
5. Potential Delay* (Max. 3-5 Days)
6. Assess Needs Against Limits
7. Evaluate Sources and Incorporate into Research
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.
Concierge Service

72 Pathways

CMS

Requests

Results

Data for Improvements

ILL / Document Delivery
Collections
Library Services Desk
Special Collections
Research & Instruction

Library Departments
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

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
Communications
Faculty Input - We Are Listening!

• Input received from 109 faculty (plus seven graduate students), some reporting on behalf of multiple faculty
• Faculty input spans 42 departments
• Specific comments on 976 unique titles

All receive a response!
https://lib.usf.edu/collections-and-discovery/communications/
Communications Update

- Feb. 3: Multi-campus deans
- Feb. 5: Library Council
- Feb. 12: Strategic Planning Task Force
- Feb. 16: Faculty Q&A invitation
- Feb. 18: Provost Wilcox
- Feb. 18: Deans and Brian Ten Eyck
- Feb. 15-25: College deans (11)
- Feb. 23: Provost Wilcox
- Feb. 24: USF Libraries’ faculty and staff
- Feb. 25: CAS leadership
- March 1: Chair of Dept. of Mathematics
- March 4: Faculty Q&A
- March 5: Library Council
- March 10: Faculty Senate

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