

USF Libraries' Strategic Budget Realignment

COMS Faculty, March 10, 2021
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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** \neq **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)



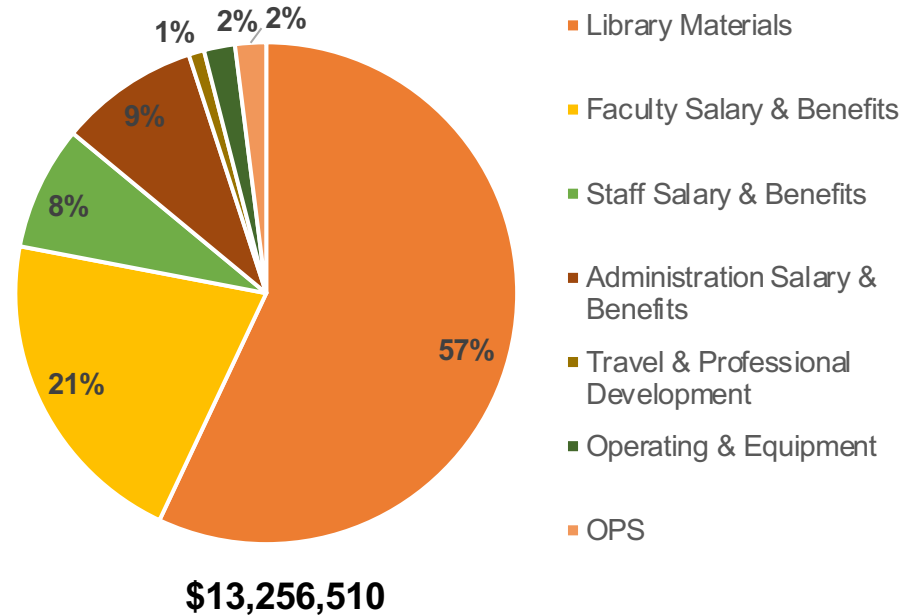
Budget Overview

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

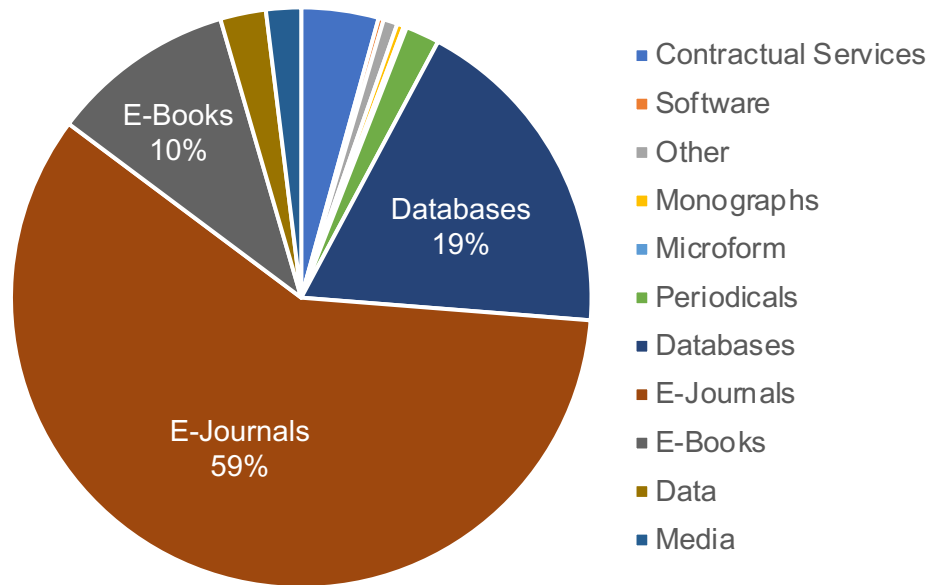
Discretionary funds to support new programs, program changes (content or level), and faculty/student demand are no longer available.

Efficiencies cannot dominate our strategy.

**Pre-Realignment FY2021
E&G Base Budget Allocation**



Pre-Realignment Materials Budget Breakdown, FY2021



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

E&G Base Budget, FY2021	\$13,256,510	
Two-Year Realignment Target	<u>- 2,033,500*</u>	-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	<u>- 650,000</u>	-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

Principles, Review Timeline & Process



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

1

**October 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**

Enhance ILL/
Document Delivery to
mitigate impacts.

4

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.

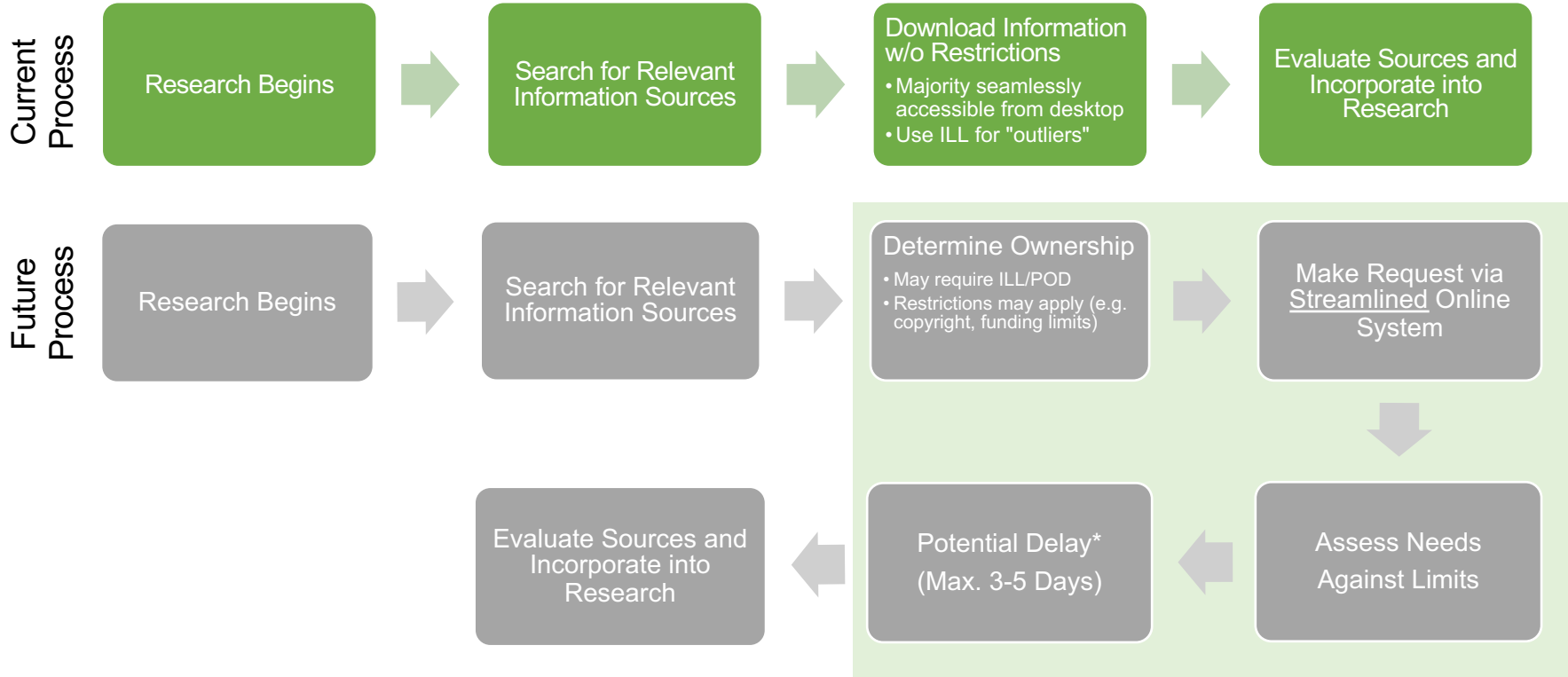
Primary “Data” Points

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



Anticipated Impact on Research

Based on analyses of peer-reviewed article citations in a sample of USF faculty publications from across disciplines, we estimate that 70-75 percent of those articles will continue to be available* after non-renewals 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.

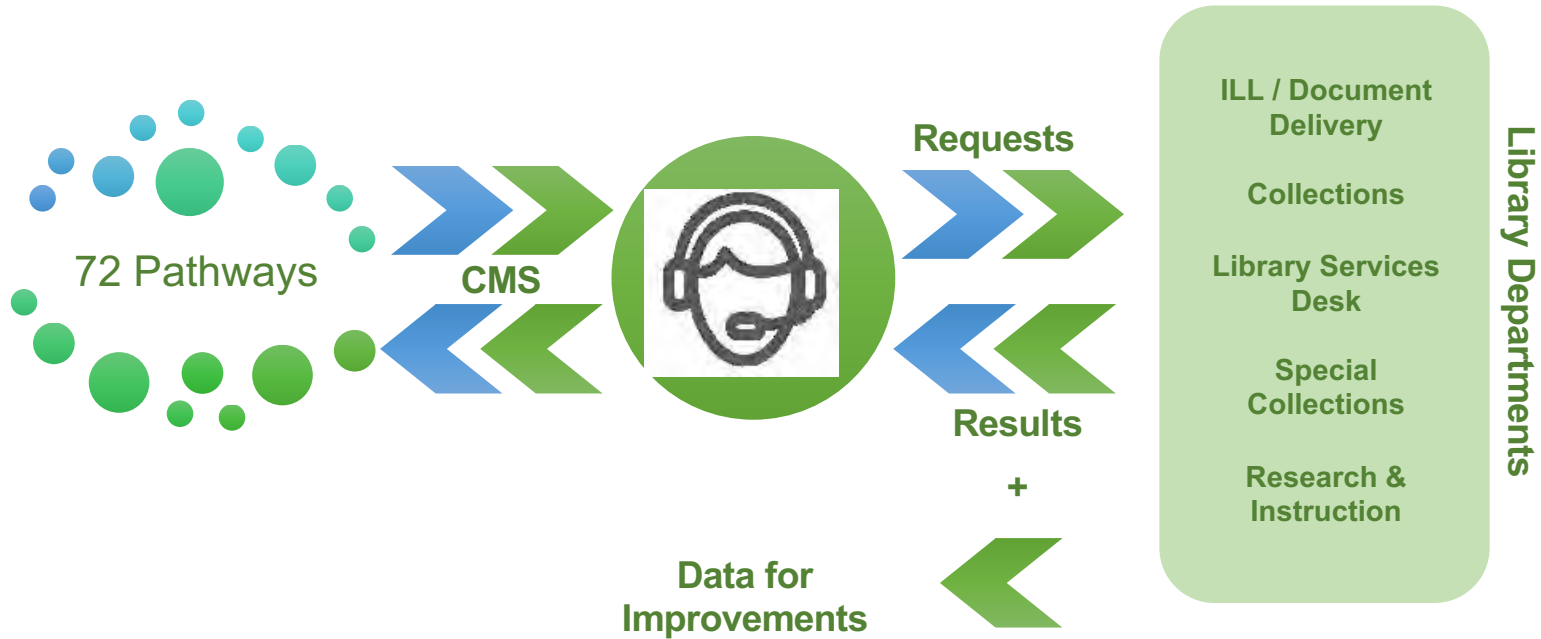
We commit to working with faculty to maximize visibility of their research and strengthen disciplinary resilience challenged by budgetary realignment through OA.

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.

Concierge Service



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.



[U-Borrow](#)

For faster delivery of print books from other FL colleges and universities. Search the [USF Libraries Catalog](#) and click on the U-borrow icon.



[InterLibrary Loan / Document Delivery](#)

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

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<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



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/>