USF Libraries’ Strategic Budget Realignment

Dean Todd Chavez Briefs the College Deans
Topics

Budget Overview

Principles & Summary of Anticipated Impacts

Mitigating the Impacts
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.
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.

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

• **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.
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
- Evaluate Sources and Incorporate into Research
- Determine Ownership
  - May require ILL/POD
  - Restrictions may apply (e.g. copyright, funding limits)
- Potential Delay* (Max. 3-5 Days)
- Make Request via Streamlined Online System
- 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 57 faculty (plus four graduate students), some reporting on behalf of multiple faculty
• Faculty input spans 28 departments
• Specific comments on 601 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.

Urborrow
For faster delivery of print books from other FL colleges and universities, search the USF Libraries Catalog and click on the Urborrow icon.

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

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

- 72 Pathways
- CMS
- Updates to Contacts
- Requests
- Results
- Data for Improvements
- ILL / Document Delivery
- Collections
- Library Services Desk
- Special Collections
- Research & Instruction

Library Departments
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/