

Report of the Administrative Board of the Library to Faculty Council

April 10, 2017

Membership of the Administrative Board of the Library

Brundage	Fitz	History	Social Sciences	2017
Churukian	Alice	Physics & Astronomy	Natural Sciences	2017
Crescenzi	Mark	Political Science	Social Sciences	2018
Hasan	Mejs		Graduate Student Representative	2017
Hunter	Carol	University Libraries	Deputy/Interim University Librarian	EO
<i>Kim</i>	<i>Heidi</i>	<i>English & Comparative Literature</i>	<i>Humanities and Fine Arts</i>	<i>2018 (Chair)</i>
Langbauer	Laurie	English & Comparative Literature	Humanities and Fine Arts	2017
Lee	Cal	Information & Library Science	Chr. Appt. At-large	2018
Metz	Winifred	University Libraries	Academic Affairs Libraries (elected)	2019
Michalak	Sarah	Information & Library Science	University Librarian	EO
Nzongola-Ntalaja	Georges	African, African-American & Diaspora Studies	Chr. Appt. At-large	2018
O'Neill	Hugh	Business	Chr Appt. Academic Affairs	2018
Smith	Hampton		Undergraduate Student Representative	2017
Tolleson-Rinehart	Sue	Pediatrics	Chr. Appt Health Affairs	2017
Vision	Todd	Biology	Natural Sciences	2018

6 meetings during this academic year.

Report prepared by Heidi Kim (chair) and reviewed by entire board.

Overview

Much of the board's activity this year focused on advocating for the prioritization and integration of the University Library in university initiatives ranging from the development of the new responsibility-centered budget model to the Chancellor's Strategic Framework to the Quality Enhancement Plan (QEP). In the course of this, the ABL met with Provost Jim Dean, Vice Chancellor Matt Fajack, and other key consultants and staff. The ABL's other chief concerns include, as ever, the physical plant and the budgetary needs of the library. Despite these

challenges, the ABL particularly highlights to Faculty Council the strengths of the library in the intellectual leadership of and service to the university and the state, as well as its increasing and critical contributions to student instruction and success. This report highlights these areas, as well as challenges in the budget, infrastructure, leadership/staffing, and an update on open access.

Budget concerns and priorities. The ABL has been focused this year on advocating for the Library in the development of the new budget model. We have held conversations with Matt Fajack (Vice Chancellor of Finance and Administration), Matt Smith of Huron Consulting, Catherine Gerdes (AUL for Financial Planning and Administrative Services), Ben Edwards of Arts & Sciences Group (re the Chancellor's Strategic Framework) and have drawn on the reports and experiences of other major public university libraries. Given the data-driven nature of the new budget model, the ABL is especially concerned that the metrics of the budgeting model should accurately reflect the multifaceted work of the libraries across areas such as collection and preservation, research support, instruction and training, event and exhibit programming, health partnerships, and digitization, and that their collaboration with all the constituencies on campus in addition to service to the wider public and cultural heritage should be recognized. While the opinions of librarians at other universities using this model as well as the experts involved in the development of UNC's model concur that libraries generally either benefit or stay steady under an RCM, the ABL also emphasizes the need to avoid an adversarial relationship between departments and units that are traditionally classed as "support centers," such as the Library.

The dynamic nature of the Library makes it difficult to track such metrics. For example, the ABL received an overview of library use statistics from Ms. Gerdes and Ms. Michalak which showed the growth and shift in facilities usage. The Davis Library gate count has been growing; the YTD count is up 10% from last year. Meanwhile, the Undergraduate Library gate counts are down, due to a combination of factors, including the growth of e-reserves and decreased traffic at the ITS Help Desk. Overall, librarians are providing more consultations and engaging in more partnerships, including global partnerships. However, these often take place outside library buildings or online, as does much teaching by librarians, and the Library will need to find new ways of tracking these contacts. On another note, the ABL learned from Mr. Edwards that the Chancellor's Strategic Framework may translate into new resources to bolster the competitive advantage that the plan is intended to create, but others may be discontinued, and the ABL will continue to advocate for the library as this process continues.

Budget gap. We continue, as ever, to be concerned about the ongoing "gap" of the acquisitions budget detailed in last year's report, in which the Provost's office provides a one-time allocation to cover the library's needs in excess of its budget. This gap is now over one-third of the acquisitions budget and continues to primarily affect monograph acquisitions, including the multi-year and bundled contract negotiations necessary for electronic monographs. Likewise, serials are reviewed annually in order to assist the library with managing this budget, including a

current large-scale review at the Health Sciences Library. The ABL discussed with Carol Hunter, interim University Librarian, the importance of communication with faculty who feel disadvantaged by a cut of a specific title; the board supports the idea that faculty would respond favorably to transparency about actual costs and the value proposition of increased dependency on document delivery and interlibrary loan as slightly less convenient but more cost effective method of ensuring continued access to needed literature. However, these constant efforts to drive down costs cannot address the magnitude of the gap, which is projected to keep rising due to inflation and diversifying research needs. The ABL continues to support a reset of the baseline for the core acquisitions budget in order to enable the library not only to provide necessary research materials but also to be able to negotiate the most favorable contracts and commitments with vendors. The Provost and Vice Chancellor Fajack have indicated that a goal of the new budget model will be to retire the gap, but until this can be fully implemented, it will be an ongoing challenge for the library and users.

Intellectual leadership. The Library continues to demonstrate its innovation and intellectual energy in a number of arenas, ranging from instruction (about which more below) to exhibitions to preservation, and is increasingly being recognized for its world-class collections. In the University Communications 2016 publication *Like No Other*, the Library's U.S. South archival holdings were specially highlighted as one of the chief distinctions of Carolina. In his annual visit, Provost Dean spoke about the Library in terms of the Chancellor's emerging Strategic Framework. In particular, he highlighted the theme "Of the public and for the public," suggesting that this offers an opportunity to think about how the Library facilitates the public mission of the University. The Provost suggested three possible directions: the Library's role in helping students from a wide variety of backgrounds to flourish at Carolina; helping all members of the community better understand democracy and the institutions by which we are governed; and celebrating student success. The board hopes that the Library will embrace these roles and communicate with the campus through strong messaging, partnerships, event planning, and curricular integration.

The discussion of the many ways in which the Library already fulfills many of the key strategic goals of the University included: innovation, particularly in the area of digitization; the work the Library does to teach students to evaluate information and wrangle data; the Health Sciences Library's role in community, campus, industry, and global health partnerships, as well as instruction in how to evaluate the quality of evidence; and the Library's contributions to international collaborations and service to the public through programming.

Student services and instruction. The Library's contributions to student services and instruction should be fully recognized. As a corollary to the above discussion, the ABL recommends that the Library create a strong central message about its immense contributions to student success. The collaborations of Research and Instructional Services at different libraries have grown sharply in the past few years. The table on the next page shows the numbers for the last two semesters completed for course-integrated or standalone training classes offered by various libraries.

	# instructed in course integration/workshops/classes
Davis Library	2016 (calendar year) instructional sessions: Fall 2016, 2954 students; Spring/Summer 2016, 2787 students.
Wilson Library	2016 (calendar year) instructional sessions: Fall 2016, 1870 students; Spring/Summer 2016, 2329 students received instructional sessions.
Undergraduate Library	2016-17 academic year (to date): 6,000 students in course-integrated instruction and >550 students/faculty in skills classes.
Research Hub @Davis	2016 (calendar year) instructional sessions/workshops: 1500 students
Health Sciences Library	2016-17 academic year (to date): 4,132 students in in-person or online synchronous sessions (undergraduate and graduate, plus consultations)

These numbers show that in each academic year, the Library directly instructs nearly every undergraduate student at Carolina, in addition to their work with graduate students and faculty. The above numbers are merely a sample and do not incorporate the cumulative instructional work of area libraries such as Art (in past years averaging around 2,500 students directly instructed per year) and do not reflect the thousands of consultations (over 78,000 in 2014-15) both in-person and online, that librarians undertake as follow-ups to course instruction or for independent projects, nor the thousands of usages of online tutorials developed by the Library. Nor, of course, do they reflect the other uses of the library system by students or the many other instructional and resource initiatives developed by the Library to address the needs of undergraduates, not to mention graduate students. Particularly critical in recent years has been the exponential growth of faculty instructional needs and student-driven calls for digital and data literacy and data carpentry. While the Library has worked to make these offerings scalable by developing workshops and modules, they are highly responsible with a limited staff size for this crucial instructional need across campus, which may increase in demand as the QEP encourages increased interdisciplinary and independent student research. As the librarians often say, “Everyone graduates from the Library,” and that should be recognized and reflected in support.

Leadership and staffing. This year marks a great shift in leadership at the University Library, as Sarah Michalak stepped down in December; deputy Carol Hunter took over as interim University Librarian. ABL members Fitz Brundage and Heidi Kim are participating in the search for the new University Librarian and Vice Provost. In addition, the board welcomed directors and AULs Nandita Mani for the Health Sciences and Maria Estorino for Wilson Library. It has been and will continue to be the board’s priority to provide support and feedback for the new initiatives of these leaders. Staffing and retention for the library remain a high priority, as several searches for research librarians, open access librarians, and others are currently ongoing. Increasing demands in several divisions due to past cuts are taxing personnel resources. The ABL notes with concern that in order to address salary and retention concerns, the Library took the monies from two vacated positions and redistributed them among the staff. The ABL repeats its recommendation

from last year that progression through the library ranks should be recognized with a salary increase to improve retention and morale.

Infrastructure. This year saw many needed infrastructural improvements. Wilson Library renovations included the roof, building envelope, staff lounge, and air handling. The Davis Library Life Safety upgrades, which will affect stack access, will begin in May 2017, and the board heard and commended the library's plans for addressing user needs for carrels and materials. However, the ABL continues to be concerned about the extensive infrastructural needs of Wilson Library detailed in last year's report, which include, among others, fire safety, fire protection, and interior repairs. These needs go beyond the ordinary prioritization of building and grounds maintenance and may require special consideration by development.

Open Access. Librarians Anne Gilliland (Director of Scholarly Communications) and Julie Rudder (Repository Librarian) updated the ABL this year on progress toward fulfillment of the Open Access Resolution passed in January 2016 by Faculty Council. The Carolina Digital Repository (cdr.lib.unc.edu) is functional and accepting submissions; enhancements and new features are still in progress. The library has been proceeding on a number of fronts: hiring three staff positions, arranging visits from other libraries involved with Open Access, and convening the Open Access Advisory Board, whose particular goal is advising on communications and messaging. The ABL encourages the Library to continue faculty education and to aim to represent faculty publications from all divisions in the archive, and also supports them in their most difficult goal of getting content from behind paywalls. As the policy recommendation originally passed by Faculty Council provided for a three-year review, faculty investment and involvement in the implementation of the policy will be critical to its success. The ABL commends the Library for establishing clear benchmarks for progress and continues to strongly support this important initiative.