

University of Washington
Faculty Council on University Libraries
December 13th, 2017
2:30 p.m. – 4:00 p.m.
Suzzallo 5th Floor Conference Room East

Meeting Synopsis:

- 1) Call to order
 - 2) Review of the minutes from October 11th, 2017
 - 3) Discussion of the Libraries' Strategic Planning Process – Jackie Belanger and Jason Sokoloff
 - 4) Good of the order
 - 5) Adjourn
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1) Call to order

Hill called the meeting to order at 2:30 p.m.

2) Review of the minutes from October 11th, 2017

The minutes from October 11th, 2017 were approved as written.

3) Discussion of the Libraries' Strategic Planning Process – Jackie Belanger and Jason Sokoloff

Jackie Belanger (Director, Assessment and Planning, Library Administrative Services) and Jason Sokoloff (Head, Foster Business Library, Reference & Research Services) were present to share information with the council and to garner feedback on the Libraries' Strategic Planning Process, which was launched in summer of 2017 and is meant to cover coming years 2018-2021. The process involves consideration of the UW Libraries' mission, values, and vision, which have not been revised since 2010. Broad strategic priorities are planned to be defined by June, 2018.

Environmental Scan

Belanger explained an Environmental Scan is currently being conducted in relation to the Planning Process, and will be the main component of discussion (Exhibit 1). The purpose of an Environmental Scan is to provide a broader context for discussion of strategic directions and priorities by highlighting key trends and issues impacting academic research libraries now and in the next 3 to 5 years. It can be a useful tool for providing a sense of internal and external strategic environmental influences that the Libraries should consider as a plan is made for the future. The Scan is planned to be completed by winter quarter, 2018.

Sokoloff explained the Scan relates to workforce technology, facilities, space, budget, and finance. The current categories of the Environmental Scan include (Exhibit 1):

- ❖ Research & Scholarship
- ❖ Student Learning & Success
- ❖ Collections & Access
- ❖ Workforce & Organizational Transitions
- ❖ Technology
- ❖ Facilities, Space, Community
- ❖ Budget & Finance
- ❖ Selected Sources

The document was sent to members in advance of the meeting, and they were asked to point out sections to discuss or provide feedback on.

Student learning and success

A member explained he believes students still need physical collections even in the current day and age. He noted he would like to see some provision for “bound books” in the planning, explaining that the sense at the UW Tacoma campus is that library space should be allocated for other needs, and there is not a lot of space for collections. Other members agreed that at least in relation to books, browsing physical collections is still more effective than searching out sources on a computer. It was noted there are 9 million volumes overall currently, a number that has grown considerably since past decades – and much of UW Libraries are currently at capacity in relation to physical stores.

A member asked about journal prices as they relate to UW Libraries. It was noted journal prices continue to rise, and the libraries receive Provost reinvestment funds to address this. Members felt many journals could be accessed online, making physical copies less useful than they used to be in years prior.

A member noted a new idea in relation to providing physical materials to UW community members is utilizing an infrastructure that allows a requested item to be sent to the Libraries for pickup, making the items available quickly, but not requiring that they be stored in the library permanently.

A member questioned the philosophy surrounding the libraries being the main providers of collaborative learning/working spaces for students. She noted her impression is that a lot of learning spaces are being provided by the libraries, and there is less space for volumes and collections, and library services. She asked how robust discussion has been relating to the shift within the Libraries. Cynthia Fugate (Senior Associate Dean of Libraries, University Libraries) explained data shows that many students come to the library to engage in “serious work” and study, and libraries have been a place for students focus on their academic work for a long time. She explained one of the reasons the onus has been placed on the libraries to provide this service to students is that the facilities are already open, public spaces that stay open into the late-night, or have overnight hours.

Research and scholarship

Belanger asked if faculty members see themselves in the trends listed in the section (Exhibit 1). A member noted there is certainly a large move towards open access and sharing data openly with the public. Other members agreed it to be an emerging trend.

A member recommended the libraries take on a greater role in facilitating that relevant information can be accessed by students (e.g. types of collections, help with locating primary sources, etc.). She noted internet searches simply list the top 10 findings of a term search, and the libraries might be more useful in providing information to students on how to access certain types of resources.

It was noted the libraries are acting more and more as a support-arm for faculty. There is a move towards partnership in teaching and learning between the Libraries and faculty.

A member noted he struggles with the libraries' website, and would like to see funding to test that the user interface works. He noted the website is growing faster than it is being refined, which makes it difficult to search within. It was clarified website user interfaces do not appear in the document, but it is something being considered.

A member asked about competing interests in formulating this strategic plan. He noted it seems UW is keeping with larger institutional trends. He asked if there are places where the UW is going against those larger trends, either externally or internally. He asked about competing interests between what faculty and students want, and if there are other conflicting groups of library users. The guests noted this information will be garnered during interviews with user groups, which have yet to be carried out. Belanger explained user input will provide information on user's competing interests.

A member noted shrinking budgets (in the Libraries) versus growing responsibilities is an issue. It was noted provost reinvestment dollars have been invested in the libraries over the past years. There are still a lot of constraints.

A member asked about changed priorities between the last strategic planning initiative and the current one. It was noted data curation and management has grown as a need for faculty, which has been amplified since the last plan was put into place. The guests explained that space pressures are growing, and the need for flexible learning and research spaces are something that is coming up increasingly. It was noted all that has been done so far is work on the Environmental Scan, and so there isn't data yet to compare. Sokoloff explained initial trends have become more pronounced in recent years. A member noted the Odegaard Library renovation speaks to the emerging needs of the community in relation to the Libraries. The Odegaard renovation was paid for by the Washington State Legislature, and came as a total surprise at the time.

A student member explained she is an online student, and her cohort isn't interested in space provided by the Libraries, as many of them do not even reside in Washington state. She noted she has recently used collaborative space in the library, and it was very useful, as well as easy to book. She questioned where else students might go than the library with these needs. It was noted students generally do not have the financial resources to pay for such spaces if they are not to be made available by the university (for free). She concluded the library is the best place to study when attending a university, and this is a good

use of the UW Libraries. It was noted the guests have not conducted space-related interviews yet, but plan to in the coming year. They noted it is clear this needs to be done.

Belanger and Sokoloff explained they welcome feedback from FCUL members on an ongoing basis for the Environmental Scan, as the document will be a foundational piece in going forward with the UW Libraries' Strategic Planning Process.

The guests thanked the council for their feedback, and they left the meeting.

4) Good of the order

Hill noted he was included in a faculty and administrative group convened by Faculty Senate chair, Thaisa Way, to determine the implementation pathway for the Open Access Policy during 2017-2018 AY. He explained the main question is whether the Policy will be implemented under the opt-in or opt-out model. He noted he would report on the outcome of that meeting.

5) Adjourn

The meeting was adjourned at 3:37 p.m.

Minutes by Joey Burgess, jmbg@uw.edu, council support analyst

Present: **Faculty:** Trent Hill, Randall Leveque, Betty Bekemeier, Michael Kucher
Ex-officio reps: Susanne Redalje, Alanna McAuley, Ellen Barker, Kate O'Neill
Guests: Cynthia Fugate, Jackie Belanger, Jason Sokoloff

Absent: **Faculty:** Richard Furman
President's designee: Betsy Wilson
Ex-officio reps: Navid Azodi

Exhibits

Exhibit 1 – environmentalscan_draft.doc

Environmental Scan

Draft revisions: December 5, 2017

Introduction

The purpose of an environmental scan is to provide a broader context for discussion of strategic directions and priorities with Cabinet & Libraries staff. It helps us to understand more clearly what we need to be paying attention to in the landscape of higher education, libraries, and the institution as we define our strategic directions as well as specific priorities and initiatives for 2018-21.

This environmental scan highlights the key trends and issues impacting academic research libraries now and in the next 3 to 5 years. It is not intended to be comprehensive in scope but rather to provide a sense of those strategic environmental influences, both internal and external, that the Libraries should consider as we plan our future. While the scan tries to anticipate these trends, it is nevertheless a snapshot of current thinking and will be updated on a regular cycle as we move forward. The selected sources consulted provide an overview and context for the key issues facing higher education and academic research libraries.

Key Core Issues for Higher Education and Academic Research Libraries

[Research & Scholarship](#)

[Student Learning & Success](#)

[Collections & Access](#)

[Workforce & Organizational Transitions](#)

[Technology](#)

[Facilities, Space, Community](#)

[Budget & Finance](#)

[Selected Sources](#)

Research & Scholarship

EXTERNAL

- Libraries are recognizing emerging-role opportunities in sustaining open and equitable systems of research and scholarship, including support for collaboration, publishing, and copyright issues.
- Scholarship is becoming increasingly interdisciplinary and cross-disciplinary.
- Digital scholarship and its inherent methods and communications are growing in all disciplines.
- “Big data” and computational approaches are driving research and scholarship.
- The commercialization of research poses challenges for academics, scholars, and higher education institutions. A shrinking number of commercial entities encompass the market for scholarly communication platforms and publishing outlets.
- Research funding sources are increasingly volatile.
- With open data sources and powerful computing options increasingly available to researchers, the need for data curation, management and dissemination expertise is expanding.

UW

- The UW has witnessed rapid growth and emphasis in more applied fields such as computer science, engineering, and allied health and decreased demand in select humanities advanced degree programs.
- As demonstrated by its newly formed Scholarly Communication and Publishing department and advocating for open access authorship, the Libraries has prioritized support for emerging scholar needs.
- The Libraries has developed and introduced a number of digitizing services as well as digital collections. However, questions about the nature, scope, and scalability of UW Libraries efforts to support digital scholarship are still evolving.
- Through venues like the Research Commons and the Health Sciences Library Translational Research and Information Lab, the UW Libraries is appropriating spaces to foster research collaborations.
- As liaisons to academic departments, librarians are redefining their roles to meet the new needs of scholars and researchers.

Student Learning & Success

EXTERNAL

- Digital, hybrid and online pedagogies continue to drive major changes in teaching and learning that require new ways of thinking.

- Blended learning, collaborative learning, and redesigned learning spaces require new pedagogies and methods of learning assessment.
- The use of learning and predictive analytics continues to grow in higher education.
- Changing student demographics and ways of working and learning are demonstrated by such trends as the growth of professional and Master's degree programs and increasing enrollment of first-generation college students and transfer students.
- Universities and libraries are devoting significant resources to student engagement efforts, including first-year experience programs.
- Information literacy frameworks, threshold concepts, and meta-literacies take on new importance as librarians expand traditional instruction practice to encompass broader critical thinking skills and related areas of media and data literacies.
- Higher education institutions acknowledge the challenges of affordability of course materials as a barrier to student enrollment and retention.

UW

- As evidenced by such developments as the UW Race and Equity Initiative and active learning spaces across campus, diversity- and equity-informed pedagogies are key areas of focus.
- Scaling library instructional services is a challenge, especially in light of growing undergraduate enrollments and an increasing focus on student retention and time to graduation.
- As interest in digital pedagogies continue to grow, the Libraries aspires to expand collaborations with teaching faculty in utilizing e-learning tools and methods in support of online, hybrid, and face-to-face courses. Online interaction is critical for engaging an emerging demographic of students. Skills and support for instructional design and educational technologies are emerging demands.
- The current political climate has highlighted the importance of information competencies and galvanized the UW and the UW Libraries to consider how to promote dialogue across ideologies and boundaries in its educational endeavors.
- Through its initiatives in open educational resources, open access publishing and openness in instruction practices, the UW Libraries has started to cultivate a role in developing solutions to student affordability of educational materials.

Collections & Access

EXTERNAL

- Cross-institutional collaboration has become essential for economics and sustainability in collection development, access, and preservation.
- Unique and distinctive collections and local expertise have become priorities in single institutions.
- Researchers need more support in obtaining materials than in discovering them.

- Libraries are challenged by limited space options for collection storage.
- The transitioning from print to digital collections poses challenges and opportunities in accessibility and preservation.
- Collaborations and consortial approaches to collections and preservation
- Ongoing and diverse collection assessment practices are essential for decision making.
- Publisher/vendor consolidation poses budgetary limitations and opportunities.

UW

- The UW Libraries has maintained funding levels in line with inflation and price increases.
- The UW Libraries has prioritized the preservation of cultural heritage materials
- Collection environmental conditions, capacity, and technical systems pose immediate and ongoing challenges for the Libraries.
- The UW Libraries relies increasingly on consortial shared purchasing and print repository practices, though the costs and benefits are difficult to quantify.

Workforce & Organizational Transitions

EXTERNAL

- Staff retirements, succession planning, and leadership transitions are priority issues that present challenges and opportunities for academic libraries.
- Although equity and diversity are valued in libraries, recruitment and retention practices have not yielded a diverse workforce.
- Emerging and evolving user needs will require library staff to be flexible and responsive in developing new skills and proficiencies.
- Libraries are striving to create and sustain organizational agility that anticipates user needs.
- Libraries recognize the need for professional skill sets that do not necessarily come with library and information science degrees and this may lead to organizational issues such as compensation and governance.

UW

- Recruitment and competitive salary offers are impeded by the local high cost of living. Salary compression also poses challenges in retaining faculty, librarians, and staff.
- While retirement and leadership transitions are significant, bridge funding helps to facilitate succession planning. Strategic thinking about changing staff roles and expertise is ongoing.
- The implementation of Workday will have staffing implications as well as access to HR related information.
- UW Libraries makes efforts to recruit and retain a diverse workforce and provides ongoing staff development opportunities to engage with equity, accessibility and social justice issues.

- UW Libraries recognizes the need to develop and sustain professional development opportunities that correspond to new, ongoing, and emerging areas of user need.
- The roles of librarian liaisons will continue to change to meet emergent research and teaching needs.

Technology

EXTERNAL

- Rapid technological change continues to drive new approaches to teaching, learning, and research. Adaptive learning technology and mobile learning are being adopted rapidly.
- Libraries are examining the role of information technology in their organizations to ensure capacity for supporting new ways of working and supporting campus demands.

UW

- UW-IT has signaled varying degrees of priorities in user services and technological infrastructure.
- Broader access to and use of institutional data expanded through UW Enterprise Data Warehouse (EDW) /and Business Intelligence (B.I.) profiles.
- Libraries systems increasingly require staff expertise in programming and data management.
- UW Libraries ITS weighs the benefits and challenges of locally-administered technology solutions against campus partnerships and cloud-based or outsourced options.
- Support is needed for researchers to curate and preserve their own online collections, connect with colleagues, and disseminate their work.
- Network and data security and privacy are constant priorities.

Facilities, Space, Community

EXTERNAL

- Library spaces are being re-designed to facilitate face-to-face interactions, foster collaborative, hands-on learning experiences, and spur innovation and entrepreneurship. These spaces include active learning classrooms, media production and virtual reality studios, and makerspaces.
- With a decreased emphasis on the local print collections and growth in shared print programs and storage solutions, on-site space devoted to collections is decreasing. Students are relying less on libraries for accessing information and more as a place to be productive.
- Libraries are moving towards user-centered design principles to create and re-design library spaces.

- Greater attention is now being paid to the ways in which libraries spaces may continue to reproduce social, economic, racial, and cultural inequalities, and how libraries spaces and facilities can play a role in fostering the inclusion of a diverse range of user groups.
- The configuration of staff spaces can encourage creative, flexible and collaborative work practices.

UW

- The UW 2018 Master Plan provides a 10-year conceptual plan for campus growth that will shape the University's space and capital planning priorities.
- The UW Libraries Strategic Space Plan outlines a number opportunities for the physical development of the Seattle campus Libraries for the next 10 to 15 years. Key issues and priority areas in this plan include the need for off-site shelving to increase student study space and the development of innovative facilities and consultation services to support digital scholarship.
- Significant space constraints will continue on campus and in the Libraries.
- Through facilities like Odegaard Undergraduate Library, the Research Commons, and the Health Sciences Library Translational Research and Information Lab, the Libraries is appropriating space-related partnerships to better serve the community.
- Particularly in the current political environment, patron security and safety are top priorities.
- Challenged by aging facilities that put collections at risk, the Libraries is actively pursuing opportunities to improve environmental conditions for its collections on campus and in off-site facilities.
- The Libraries relies on minor capital funding for facilities renovations.

Budget & Finance

EXTERNAL

- Public funding for higher education is declining while tuition costs are rising.
- Federal and private research funding sources are becoming less reliable.
- Changes in federal tax policy (graduate tuition remission, itemized deductions) may have a negative impact on academic institutions in recruitment and funding
- Academic institutions are pursuing self-supporting programs and other alternative sources of funding.
- Along with the rising costs of a university education comes rising student debt.
- Academic institutions are increasingly compelled to articulate and demonstrate their value, impact, accountability, and responsibility as state agencies and stewards of public resources.
- Changes in health care funding will impact the quality of clinical care and related research.

UW

- Political division in the state legislature and competition for state funds (especially K-12 education) yields diminishing resources and unpredictable budgeting.
- UW budget outlook is flat at best during the next few years with no new funding except for modest salary increases.
- There is modest growth in undergraduate enrolment, and tuition increases will increase no more than 3% annually for resident undergraduates.
- Federal research funding is flat or slightly down, however other external funding has increased and overall research funding is somewhat higher the past few years.
- Launched in 2016, the \$5 billion UW philanthropic capital campaign is underway and near its goal ahead of schedule.
- UW leadership is in transition. Following the relatively recent appointment of a new university President, a new Provost recruitment is underway.
- Local minimum wage increases pose challenges for maintaining student employee staffing.
- The UW Libraries strives to demonstrate its value to campus stakeholders, communicate its impact to academic and local communities, and maintain its innovative reputation among peer institutions.

Selected Sources

[UW Libraries Cabinet Trends and Issues Survey Synthesis](#) (Summer 2017)

UW sources:

- UW Diversity Blueprint 2017-21, <http://www.washington.edu/diversity/diversity-blueprint/>
- 2018 Campus Master Plan, <https://cpd.uw.edu/campus-master-plan>
- FY 2018 Preliminary Operating Budget, https://opb.washington.edu/sites/default/files/opb/Budget/Adopted_FY18_Operating_Budget.pdf
- University of Washington Business Intelligence (B.I.) Portal, <https://biportal.uw.edu/>

UW Libraries-related data compiled by Strategic Planning Working Group Environmental Scan task Force (Amanda Hornby, Azusa Tanaka, Dylan Glenn), consulting the following material:

- [IRC CPR recommendations](#)
- [UW Libraries Organizational Review Initiative](#)
- [UW Libraries RLS ORI environmental scan](#) (UW and external)
- Survey results of [issues and trends submitted by Libraries Cabinet](#)
- Strategic Space Plan for the University of Washington Libraries, prepared by Dugdale Strategy and Mahlum Architects (December 2016).

Funding and Budget

- Neuman, W.R. (2017), "Charting the Future of US Higher Education: A Look at the Spellings Report Ten Years Later," *Liberal Education*, Winter 2017, Vol. 103, No. 1.
- Coley, T. (Jan 19, 2016), "4 Trends Shaping Higher Education in 2016," *EdSurge News*, <https://www.edsurge.com/news/2016-01-19-4-trends-shaping-higher-education-in-2016>

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- Ithaka S + R (2016), *Organizing the Work of the Research Library*, <http://www.sr.ithaka.org/publications/organizing-the-work-of-the-research-library/>
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- Schonfeld, R. and Sweeney, L. (August 30, 2017), *Inclusion, Diversity, and Equity: Members of the Association of Research Libraries: Employee Demographics and Director Perspectives*, <https://doi.org/10.18665/sr.304524>

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- NMC Horizon Report: 2017 Higher Education Edition. <http://www.nmc.org/publication/nmc-horizon-report-2017-higher-education-edition/>
- Mintz, S. (April 20, 2016), "Why Higher Education needs to be more future focused," *Inside Higher Ed* blog, <https://www.insidehighered.com/blogs/higher-ed-beta/why-higher-education-needs-be-more-future-focused>

Research and Scholarship

- Ithaka S + R (2016), *A Day in the Life of a (Serious) Researcher: Envisioning the Future of the Research Library*. <http://www.sr.ithaka.org/publications/a-day-in-the-life-of-a-serious-researcher/>
- NMC Horizon Report: 2017 Library Edition, <http://cdn.nmc.org/media/2017-nmc-horizon-report-library-EN.pdf>

- Association of College & Research Libraries (rev. October 2016), ACRL Plan for Excellence <http://www.ala.org/acrl/aboutacrl/strategicplan/stratplan>)

Collections and Access

- ARL White Paper (2016). Concerted Thought, Collaborative Action, and the Future of the Print Record, <https://printrecord.mla.hcommons.org/concerted-thought-collaborative-action-and-the-future-of-the-print-record/>
- ARL Strategic Thinking & Design Initiative: Update and Extended Report (2016): <http://www.arl.org/storage/documents/publications/arl-strategic-thinking-and-design-initiative-extended-and-updated-report-june2016.pdf>
- New Media Consortium Horizon Report: 2017 Library Edition, <http://cdn.nmc.org/media/2017-nmc-horizon-report-library-EN.pdf>

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- Ithaka S + R (2017), Finding a way from the margins to the middle: library information technology, leadership, and culture, <http://www.sr.ithaka.org/publications/finding-a-way-from-the-margins-to-the-middle/>
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Facilities, Space, Community

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- Protolib Project @ University of Cambridge (and 2 Ithaka S + R blog posts by Nancy Fried Foster: <http://www.sr.ithaka.org/blog/the-protolib-project-at-the-university-of-cambridge-part-1/> and <http://www.sr.ithaka.org/blog/the-protolib-project-at-the-university-of-cambridge-part-2/>)