



May 4, 2009

Dear Libraries Staff:

I am pleased to share with you the report of the Task Force on New Models of Service Delivery, which completed its work on April 24, 2009. The Task Force was asked to recommend changes to Libraries service models that would better support current and emerging user needs in the most cost-effective manner. A critical component of the charge was to recommend which service points within the University Libraries (Seattle campus) could be merged into larger units, reconfigured or discontinued. After careful review of available data, wide consultation and much careful thought, the Task Force has submitted its recommendations.

The report is a complex document with a number of recommendations for near-, mid-, and long-term action on the part of the Libraries. Some of the recommendations will be implemented immediately; others will need to be studied in more depth and perhaps slightly revised in order to accomplish our strategic and budgetary goals. With respect to the recommendation about the consolidation of specific branch libraries, I have begun the consultation process with leaders of the affected units and expect those discussions to conclude shortly. One of my goals in the consultation process is to reassure our user communities that the proposed transformation of our physical collections and facilities will result in enhanced access to the resources and services you all so ably provide.

The Association of Research Libraries recently published a high level review of major challenges facing research libraries. *Transformational Times* argues for fundamental change in the way that we interact with our faculty and students, manage our collections, and use our physical spaces. As noted in the Task Force Report, the rise in technology enabled multi- and interdisciplinary research and scholarship is reshaping the higher education landscape. Libraries and librarians will need to refocus our time and attention to these emerging practices in order to understand and support knowledge creation and data curation in these arenas.

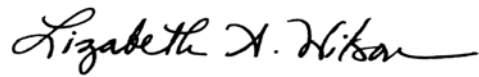
An innovative idea in the Task Force report is the development of a Research Commons. Expertise from throughout the Libraries will have to be brought together to envision and create this new service. It will also require bringing resources and services together in a new way to provide a more seamless path for students and faculty to pursue their scholarship and research.

We know that the Libraries' most heavily used service point is the virtual library. Analogous to creating a physical service point where people can come together to discover, create, and explore, we also must develop a virtual Research Commons: bringing resources together to add value to the research process. As with the physical Research Commons, the virtual commons will draw on expertise across campus.

The Libraries' strategic direction of fewer more consolidated service points coupled with electronic distribution of many services to the desktop will position our staff to develop and deliver the kinds of expert services needed by faculty and students now and in the future. I look forward to working with you and our community of users to make this vision a reality.

I want to extend my deep gratitude to the members of the Task Force on New Models of Service Delivery. They produced an excellent, well-researched and well-reasoned report in record time. Their work will form the foundation of much of our work for years to come and we are all in their debt.

Sincerely,

A handwritten signature in black ink that reads "Lizabeth A. Wilson". The signature is written in a cursive style with a long, sweeping tail on the final letter.

Lizabeth (Betsy) Wilson  
Dean of University Libraries

**Task Force on  
New Models of Service Delivery**

**Final Report**

**Submitted April 24, 2009**

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## **I - Executive Summary**

The Task Force on New Models of Service Delivery was charged by the Dean of University Libraries in mid-January to recommend which service points and shelving locations within the University of Washington - Seattle campus could be merged into larger units, reconfigured or discontinued. While the current budget situation has accelerated the need for change, the establishment of fewer, more consolidated service locations—along with making more services and content available at the desktop—has long been a key strategic direction for the Libraries. Because of our relatively short timeframe we concentrated on branch libraries and units within the Suzzallo and Allen Libraries.

The Task Force reviewed unit summary data consisting of selected 2007-2008 annual usage statistics and other data regularly collected by the Libraries. The criteria weighed most heavily as we considered our branch consolidation recommendations were (1) relatively low on-site use and (2) relatively low dependence on print resources and high dependence on digital resources. We also considered the likelihood of campus renovations requiring temporary library relocations.

Our review of service points within the Suzzallo and Allen Libraries was driven primarily by (1) a budgetary need to reduce costs by reducing the number of staffed service points within the facility (2) a desire to make the facility more user friendly by reducing the number of shelving and service points and (3) a long-term need to prepare the facility to accept both imminent and future branch consolidations. We also conducted 38 meetings with Libraries staff to learn more about how each unit is used by students and faculty, discuss potential consolidation ideas, and gather their ideas for more innovative and effective ways to deliver services to users.

Based on our evaluation, the Task Force recommends the following actions:

- Combine Natural Sciences Library reference and instruction services and Suzzallo Reference and Information services to create a new interdisciplinary service group in Suzzallo and Allen Libraries. Natural Sciences librarians would retain their liaison and subject responsibilities in the new configuration. A circulation/information desk would be maintained at the Allen South entrance and become part of the current Information Desk network.
- Create a new Research Commons in Allen South to help foster a “community of scholars” for graduate students, teaching assistants, faculty, and undergraduates doing research. The Commons is envisioned as a technology-rich space for collaboration for all disciplines, as well as interdisciplinary studies. The facilities and services would include support for group research, meetings, seminars, presentations, and media productions. The Research Commons service programs are envisioned as evolving over time, with active input on its development by the users themselves.
- Integrate the Natural Sciences Library collection, Suzzallo Periodicals, and the Suzzallo and Allen main collections into one A-Z call number run. This integration would include display periodicals, new books displays, and Children’s Literature. Work would begin immediately and be completed by summer 2010.
- Consolidate the Chemistry, Drama, Fisheries-Oceanography, Physics-Astronomy, and Social Work branch libraries this summer. The majority of materials would go into the Suzzallo and Allen Libraries, but some could be relocated to other collections.

Collections would be moved first to Kane Hall for staging and then integrated into their new locations over the 2009-2010 fiscal year. Branch heads would retain their liaison and subject responsibilities and become part of the new interdisciplinary service in Suzzallo-Allen. The Head of Drama will become acting Head of the Art Library. A planning and implementation group would need to be formed to coordinate the moves.

- Combine the Microforms-Newspapers, Government Publications, and Maps service desks into one combined desk on Suzzallo Ground in summer 2010. Consider the possibility of Maps and Interlibrary Loan exchanging locations. A planning and implementation group would need to be formed to coordinate the mergers and moves.
- Complete the build out of compact shelving in the last empty area at Sand Point this summer.

The one-time costs to accomplish the actions noted above are estimated to be in the range of \$380,000 to \$420,000. The first year cost savings from the five non-Suzzallo and Allen library unit consolidations would be in the range of \$100,000 to \$130,000 and the annual cost savings after five years would be in the range of \$400,000 to \$450,000.

The current budget crisis and the need to find immediate savings will only accelerate the changes we would have made more slowly over time. Consolidation will help us reduce ongoing costs and incrementally improve services but in order to really meet the evolving needs of our users as creatively, efficiently and effectively as possible, the situation also demands deeper, more transformative changes in the ways we do business and make decisions. Establishing the Task Force on New Models of Service Delivery has been a significant step, but it is just the start of what must be an ongoing strategic conversation about future directions and priorities.

## **II - Introduction**

The mission of the University Libraries is to enrich the quality of life and advance intellectual discovery by connecting people with knowledge. Before the revolution in information technology that began in the last decade of the 20<sup>th</sup> century, the way research libraries connected people to knowledge was by building extensive print collections and on-site services in all subject areas and assuming that users would come to our facilities to do their research. For a library the size of the University of Washington, with its strong tradition of branch libraries and decentralized service points, it meant building staffing, and maintaining over 20 different Libraries facilities.

By the mid-1990s, our assessment data began to tell us that a significant number of users preferred desktop delivery and that the availability of a critical mass of online content—especially in the areas of science, technology, and medicine—would allow us to begin recalibrating the balance between our physical collections and services points and our virtual services. The Libraries began to articulate a long-term strategy that called for reducing the number of service points and expanding our online services as opportunity allowed. In 1995, the Geography, Philosophy, and Political Science Libraries were consolidated into the Suzzallo Library. In 2004, the Forest Resources Library was merged into the Natural Sciences Library in Allen South. The documents comprising this body of work and subsequent consolidation

activities are summarized in the *New Models of Service Strategy Timeline* that accompanies the Task Force's charge.

The deteriorating budget climate is causing every part of the University to look closely at its operations for potential cost savings, but there are many other good reasons for considering service point consolidations now. Over time, as options for accessing electronic resources remotely and requesting that print resources be delivered to other locations on campus for pick-up have increased, on-site use has correspondingly decreased in nearly all Libraries facilities, but especially in branch libraries. Circulation data show a steady and significant decline in the use of print collections in many disciplines. Our Triennial Surveys indicate that, while undergraduates continue to rely on library spaces as work and study space, there has been a marked decrease in on-site use by graduate students and faculty. Feedback from users working in multidisciplinary areas also indicates that they are often frustrated to find that the resources they need for their research and learning are scattered in library facilities across the campus.

As stewards of the University's library resources it is critical that the Libraries regularly review its operations to ensure that we are providing the highest quality information services in the most cost effective manner. While the certainty of budget reductions has lent an added sense of urgency to our work, the recommendations in this report reflect the Libraries' long term strategy of delivering excellent library services through a combination of fewer, and more consolidated, service points and a growing amount of online content to the desktop.

### **III - Establishment of the Task Force**

The Task Force on New Models of Service Delivery was charged by the Dean of University Libraries in mid-January to recommend which service points and shelving locations within the University of Washington - Seattle campus could be merged into larger units, reconfigured, or discontinued. Our charge notes that, while the current budget situation has accelerated the need for change, the establishment of fewer, more consolidated service locations—along with making more services and content available at the desktop—has long been a key strategic direction for the Libraries.

As part of the review, we were asked to consider usage and other data compiled by the Libraries Assessment and Metrics Team and any other information we considered relevant to our work. We were asked to recommend changes that could better support current and emerging user needs in the most cost-effective manner. The charge specified that the changes should include some, but perhaps not all, of the following:

- Consolidation of service points and/or collections within a facility
- Consolidation of branch libraries into the Suzzallo and Allen Libraries, Health Sciences Library, Odegaard Undergraduate Library, or other location
- Merger of branch libraries
- Alternative collection housing recommendations such as compact shelving and additional relocation to the Sand Point off-site shelving facility
- Ways to use current space more effectively
- More innovative and efficient ways to deliver services to users, including virtual services and delivery to the desktop or office

In addition, the Task Force was asked to: provide estimates of cost savings or expenses that would accompany the recommended changes; develop a timeline and sequencing for consolidations and mergers that takes into account the need to move collections, relocate staff, and change records; consult with appropriate staff; and, note which units we should consider as permanent strategic investments and which units could be consolidated, even if the consolidations may not happen immediately.

#### **IV - Working Assumptions and Guidelines**

The Task Force was guided by the following assumptions and guidelines during the course of its review. Some were developed at the beginning of the process and others evolved over the past three months. The Task Force:

- Assumed its time would be spent most effectively by focusing primarily on consolidations which would result in cost savings and capacity building
- Relied primarily on existing usage data and the results of recent Libraries surveys instead of collecting new data
- Assumed that we would recommend consolidation of 3-5 branches and several units within Suzzallo-Allen, as per both our charge and the Libraries *Business Plan* scenarios submitted to the Provost on February 17
- Assumed that our recommendations for branch consolidations would focus primarily on units with the lowest in-person use and the least reliance on print materials
- Compared branch libraries to each other, not to an ideal or standard
- Adopted some of the Libraries Budget Planning Principles as useful guidelines
  - Stay future oriented and in alignment with our strategic goals
  - Retain and enhance our user-centered focus
  - Look for opportunities for transformative change
  - Achieve savings now, and create flexibility and options for the future
- Assumed that its work was just one piece of a larger strategy to reduce costs and transform how the Libraries delivers services to users and that the conversation begun here would continue far past the mid-April due date for this report

#### **V - Task Force Methodology**

The Task Force began meeting weekly on January 21, 2009. We closely reviewed the reports of other groups with similar charges (Service Points and Collections Location Review Group, Biosciences Resources and Planning Task Force, and Suzzallo and Allen Space, Services, and Collections Review Committee) to build on work already done, but focused on developing our own recommendations. Because of time constraints, we decided to focus first on potential branch library consolidations and consolidations of units within the Suzzallo and Allen Libraries.

##### *Branch Libraries*

The University Libraries is fortunate to have a large body of excellent assessment and usage data available. The Task Force reviewed unit summary data compiled by the Library Assessment and Metrics Team. The summary data, consisting of 2007-2008 annual usage statistics and other data regularly collected by the Libraries, is available on the Task Force's staff web page and as Appendix 1 to this report. The Task Force agreed early in its work that the elements we would

weigh the most heavily as we considered our branch consolidation recommendations would be (1) relatively low on-site use and (2) relatively low dependence on print resources and high dependence on digital resources.

Relevant branch usage data considered by the Task Force included: in-person reference queries; gate counts; photocopies; initial circulation (excluding renewals which could be done in-person or online); counts of in-library use material; and reserves. We also identified the percentage of each branch library's serials fund that is spent for online content. While this figure doesn't reflect completely how much of a particular branch library's primary subject area is available online (for example, serial expenditures do not include one-time backfile purchases or titles available in full text aggregator databases), it provides an important metric that indicates the relative importance and availability of online subject content for each branch library.

Because we wanted to both provide context for the quantitative data and speak personally with branch staff about how students and faculty use their units and potential consolidation scenarios, members of the Task Force also conducted interviews with each branch library, as well as units within Suzzallo and Allen. We sent units a standard set of questions which guided our discussions. Highlights from our conversations, as well as a "unit snapshot" of usage data and survey results, are available on the Task Force staff web page.

#### *Suzzallo and Allen Libraries*

The Suzzallo and Allen Libraries comprise our flagship facility on campus. Because the combined facility is so large and complicated by so many service points, one cannot attain the same degree of discrete unit-level usage data as smaller branch libraries. That said, gate counts from the several building entry points are important indicators of activity in parts of the building, as are photocopy and unit circulation figures.

Our review of service points within Suzzallo-Allen was primarily driven by (1) a budgetary need to reduce costs by reducing the number of staffed service points within the facility (2) a desire to make the facility more user friendly by simplifying and reducing shelving and service locations, and (3) a long-term goal to prepare the facility to accept both imminent and future branch consolidations.

When the Allen Library was completed in 1990, it included a large space for a Natural Sciences Library. The library operates as a separate science branch library within the larger facility, with its own staff, programs and service desks, but shares general operational responsibilities (such as participating in centralized opening and closing procedures) with staff in other parts of the building. As more and more content has become available online, and in-person use has declined, the question of how best to serve users in the natural and life science areas has arisen.

The Suzzallo and Allen Space, Services, and Collections Review Committee (SASSCR) was charged in 2007 to review the present service, space and collections configurations in the Suzzallo and Allen Libraries and to recommend changes that could better support user needs and further the goals of the Libraries strategic plan, *Vision 2010*. The Task Force has studied and discussed the three scenarios concerning the Natural Sciences Library that emerged from the

2008 *SASSCR Report and Recommendations*. We also considered the preferred futures outlined in the 2007 *Biosciences Resources and Services Planning Task Force Report*.

We met with staff from all service points within the Suzzallo and Allen Libraries and explored a range of possibilities. Our recommendations reflect what we think will deliver the best outcomes of cost efficiency, user service, and long term sustainability.

## **VI - Recommendations**

The recommendations of the Task Force are in line with the strategic direction of the Libraries since the mid-1990s – the move to fewer, more consolidated physical locations along with an increasing emphasis on the delivery of resources to the desktop. In ways only imagined a decade ago, faculty and students are able to take advantage of library services and resources without coming to the physical library.

As described in more detail elsewhere in this report, the Task Force examined data on the levels of onsite use, the availability of networked digital materials in various disciplines, circulation of library materials, the increasing interdisciplinary academic environment, and overall trends in library use. In-person use has steadily declined, particularly in certain locations.

Consolidating library units will allow the Libraries to cut costs and at the same time redirect staff time to providing new models of service, such as electronic reference and delivery of materials to the desktop. One benefit will be the collaborative synergy that comes with staff being located in closer proximity to each other. Integrated collections will provide better support for interdisciplinary use. With fewer locations to manage, the Libraries can provide better housing for the collections, with wider access for more people and more room for collection growth.

The Task Force is recommending that a number of library units, service points and collections be consolidated, principally into the Suzzallo and Allen library space. More specifically the Task Force recommends:

- 1) Combine Natural Sciences Library (NSL) services and Suzzallo Reference and Information services to create a new interdisciplinary service group in the Suzzallo and Allen Libraries.
  - A circulation/information desk would be maintained at the Allen Library South entrance, to become part of the Suzzallo and Allen Libraries information desk network. The current NSL librarians would retain their subject liaison responsibilities, but there would no longer be a separate reference desk in this space. Instead, the Allen Library South Ground Floor would become a research commons, and all librarians would be involved in creating and staffing it. These librarians, along with other public services staff, would also maintain the Suzzallo Reference Desk (or its successor) and would maintain and expand online reference services such as Question Point and chat reference.
  - The separate processing of NSL periodicals and other materials that currently occurs would be consolidated into the main library processes. NSL staff will be reassigned

(and trained) to meet the needs of the Libraries in other areas, taking into consideration staff interests.

- Reserve functions previously maintained by NSL would be moved over to OUGL.
- 2) Establish a Research Commons on Allen South Ground Floor.
    - A Research Commons would provide a “community of scholars” for graduate students, teaching assistants, faculty, and undergraduates doing research. The Commons would be a technology-rich space for collaboration for all disciplines, as well as interdisciplinary studies. The facilities would include support for group research, meetings, seminars, presentations, and the creation of media productions. The Commons would evolve over time, with active input on its development by the users themselves, working with the librarians, to select furnishings, equipment, technology, and software. See Appendix #4 of this report for more details.
  - 3) Integrate the Natural Sciences Library collection, Suzzallo Periodicals, and the Suzzallo and Allen Main collections into one A-Z call number run. This integration includes the display periodicals and new books displays, as well as the Children’s Literature collection. Consider the possibility of merging parts of the Curriculum Materials collection.
    - The disposition of specific materials needs to be examined closely, but the integration process will include the incorporation of most of the materials from the five branch libraries into the Suzzallo and Allen collections. Once the collections of the five units are in Kane Hall, the shifting and integration of the three Suzzallo and Allen collections can proceed. All eight collections would be integrated simultaneously, beginning with the A-classed material.
  - 4) Consolidate five branch libraries. This recommendation is based on current low levels of onsite use, and a high percentage of networked digital materials available to the primary users of four of the libraries: Chemistry, Fisheries-Oceanography, Physics-Astronomy, and Social Work libraries. The Drama Library is recommended for consolidation based on current low levels of use of onsite materials, the existence of complementary collections in other locations, and the possible need to move the library due to pending renovation of Hutchinson Hall.
    - Materials from the five branch libraries would be incorporated into the Suzzallo and Allen libraries collections, with the understanding that, as appropriate, some materials could be moved to other libraries. For example, some of the material from the Social Work Library may be more appropriately housed in the Health Sciences Library. It is also possible that parts of the Drama Library collection could be moved to the Odegaard Undergraduate Library (OUGL).
    - The reserve functions from all five branch libraries would be moved to OUGL.
    - Serials received directly by branches will need to be incorporated into main library serials receipts.
    - The Task Force suggests that staff from consolidated units be reassigned according to the strategic needs of the Libraries. The current branch heads should retain their liaison and collection development responsibilities. An effort should be made to

- match staff preferences and new duties. The need for training should be factored in when considering the reassignments.
- Some space in the vacated branch libraries should be retained as librarian liaison offices. The K.K. Sherwood Library can be considered as one example of the productive use of such a space.
  - The Task Force recommends that a committee be appointed to plan and implement the consolidations.
- 5) Merge the Microforms-Newspapers, Government Publications and Maps service desks into one combined desk on Suzzallo Ground. Appropriate parts of those collections would be shifted to support the new service point. Consider the possibility of the Maps Collection and Interlibrary Loan (ILL) exchanging locations. These moves may provide better public access to the Map collections and better ILL access to the Receiving Room
- The consolidated service desk would be centrally located, opposite Stair 5 and the Suzzallo public elevators. Everyone who staffs the desk would have a certain level of training in all three areas, with the specialists in each area available for consultation as needed. This desk would be staffed during open hours of the building.
  - Some of the maps materials (possibly the atlases, gazetteers, and the reference books) would be moved to the area currently occupied by the Government Publications reading area. If the locations of Maps and Interlibrary Loan are reversed, then most of the map cases would be moved to the 1935 wing of Suzzallo Ground Floor. The implementation committee for this consolidation/move will need the services of a structural engineer to help plan the layout for the Suzzallo Ground Floor, 1935 and 1963 wings.
  - Create an implementation committee to study the feasibility of these moves and to plan the merged Microforms-Newspapers, Government Publications, and Maps service desk.

## **Proposed Schedule of Consolidation**

### **Summer 2009**

1. Compress existing East Asia Library collection in Kane Hall.
2. Complete the build-out of compact shelving in the last empty area at Sand Point.
3. Plan and prepare for the moves of the 5 branch libraries and the Natural Sciences Library.
4. Move collections of the 5 branch libraries into Kane Hall stacks.
5. Move the staff of the 5 branch libraries to their new locations in other parts of the Libraries.
6. Begin integration of the Suzzallo and Allen Libraries collections into one A-Z call number run. As this process occurs, move the appropriate call numbers out of the Kane stacks and into Suzzallo and Allen. Overall, we anticipate this process will take at least a year from start to finish.
7. Create the first iteration of the Research Commons.
8. Combine Suzzallo Reference and Information Services with the Natural Sciences Library services.

## Summer 2010

1. Combine the service desks of Microforms-Newspapers, Government Publications, and Map Collection into one desk on the Ground Floor of Suzzallo.
2. If it is determined to be feasible, move Maps up to the Suzzallo Ground Floor and move Interlibrary Loan down to the Suzzallo basement area where Maps has been.
3. If the branch material temporarily housed in Kane Hall has been completely moved out by this time, then decompress the East Asia Library collections.

## **VII - Strategic Investment Summary**

In addition to recommending units for immediate consolidation, the Task Force was also asked to note which units the Libraries should consider as permanent strategic investments and those that could be consolidated, even if the consolidations may not happen immediately.

Third Tier Facilities. Consider for consolidation now.

Chemistry Library  
Drama Library  
Fisheries-Oceanography Library  
Physics-Astronomy Library  
Social Work Library

Second Tier Facilities. Consider for consolidation later and make strategic investments as appropriate. Continue to assess on-site use, amount of subject content available online, and progress toward funding of a new Fine Arts Library facility.

Art Library  
Architecture-Urban Planning Library  
Friday Harbor Library\*  
Mathematics Research Library  
Music Library

First Tier Facilities. Consider as permanent strategic investments because of high on-site use, large user populations, or large collections of specialized materials.

East Asia Library  
Engineering Library  
Foster Business Library  
Health Sciences Libraries\*\*  
Odegaard Undergraduate Library  
Sand Point Remote Shelving Facility  
Suzzallo and Allen Libraries

\*Because of its remoteness, high use in summer by UW students and researchers, 24-hour access, and relative low cost to the Libraries, the Friday Harbor Library facility plays a unique role in the Libraries' array of services. We recommend monitoring programs using the facility for any budget-driven reductions to research or instruction programs and assessing the situation again in two years.

\*\*Includes librarian office and pick-up point at K.K. Sherwood.

## **VIII - Consolidation Costs, Annual Unit Costs and Potential Savings**

### **Consolidation Costs**

Consolidation costs include costs for moving material out of the consolidated units and the cost of preparing receiving units to integrate the additional collections, equipment and staff. For a Summer 2009 closure of units, the collections could not be moved directly into the Suzzallo and Allen collection since that collection must be entirely shifted to accommodate these new materials. The collections from the consolidated units would need to first be moved into Kane Hall Auxiliary Stacks into space currently occupied by East Asia materials. The East Asia material would need to be compressed to create space for the incoming material and then shifted back after materials have been moved to Suzzallo and Allen.

Once the material from the consolidated units is in Kane, the Suzzallo and Allen collection shift would begin, and material would be pulled from Kane, Periodicals, Children's Literature and Natural Sciences and integrated into one call number run. At the same time, Chemistry books could be security stripped (\$2,372), and any Dewey-classified material could be reclassified while at Kane. Any Dewey-classified material sent to Sand Point would not need to be reclassified. The moving cost for the five units is estimated at \$128,008, and the cost to take down and remove the shelving is \$34,317. To have enough surge space to shift the Suzzallo and Allen collection, we will need to send Natural Sciences storage material in Allen B2 out to Sand Point.

There are also additional costs for shifting the Suzzallo and Allen collection, moving Natural Sciences storage to Sand Point, shifting Sand Point collections and shifting the entire Suzzallo and Allen collection, for a total of \$96,365. (An itemized list of costs is in Appendix 2). We will also have to shift the Sand Point collection to accommodate Natural Sciences Storage material and any Dewey-classified material that needs to go out there (\$10,000).

We are also planning on installing compact shelving in the last open bay in the Baker Auxiliary Stacks space at Sand Point -- new shelving will cost \$95,610. There may be some additional costs for RADITS units to change records for consolidated units. The total costs of consolidation would therefore be \$395,522.

### **Annual Unit Costs and Potential Savings**

The five non-Suzzallo and Allen units considered for consolidation have total annual costs ranging from \$102,000 to \$149,000 per unit (see attached Appendix 2). Once a unit is closed, all of the operational costs of the unit and most of the hourly staff costs will be saved. The first year cost savings for all five units, not including permanent staff, would be approximately 100% of the operations costs and 80% of hourly staff costs. (We assume that 20% of the hourly budget from the branches would be reassigned to units that would receive the collections.). Hourly budget savings (\$61,310) plus operations savings (\$56,658) would be a first year savings of \$117,968.

Over time, some staff costs would also be saved as staff move to vacant positions. One could estimate that over a period of five years, all of the classified staff positions from consolidated units could be moved into other positions. It is assumed that 50% of librarian positions would continue to support liaison and collection development activities in their current discipline. The

annual savings at five years would then be 100% of the operational costs, 100% of the classified staff salaries, 80% of the hourly salaries, and 50% of the librarian salaries. Five years after merging the units the annual savings would be in the range of \$400,000 to \$450,000.

Trying to estimate cost savings from Natural Sciences consolidation is difficult. It is assumed that there will still be a circulation desk at the Allen South entrance so staff and hourly funding will still be needed for that function. NSL librarians, like other librarians from consolidated units, will continue their liaison and collection development activities; in addition it is expected that they will serve on the new interdisciplinary reference and information services group for the Suzzallo and Allen libraries. Some hourly funding will need to go Suzzallo Circulation for shelving and stacks management but we should expect some hourly savings in the first year. Current budgeted salaries levels for Natural Sciences Library staff are \$246,204 for librarians, \$115,860 for classified staff and \$49,300 for hourly staff.

### **Current Staffing Levels**

<b>Unit</b>	<b>Staffing Level</b>
<i>Chemistry</i>	1.0 FTE Librarian 1.0 FTE Library Technician Lead
<i>Drama</i>	1.0 FTE Librarian 1.0 FTE Library Technician Lead
<i>Fisheries-Oceanography</i>	1.0 FTE Librarian 2.0 FTE Library Technician III
<i>Natural Sciences</i>	4.55 FTE Librarian 1.0 FTE Library Supervisor II 2.0 FTE Library Technician Lead
<i>Physics-Astronomy</i>	.75 FTE Librarian 1.0 FTE Library Technician Lead
<i>Social Work</i>	1.0 FTE Librarian 1.0 FTE Library Technician Lead

### **IX - Consolidation Issues**

Consolidating branch library services and collections into a central facility such as the Suzzallo & Allen Libraries would offer numerous service enhancements for library users. At the same time, there are a number of issues related to consolidation that will concern both users and staff, and to which the Libraries must pay careful attention.

#### *Service Enhancements and Capacity Building*

- Hours – Larger facilities are able to provide more open hours per week than small branch libraries.

- Facilities – In many cases the Suzzallo and Allen Libraries offer more access to computer workstations and photocopiers, better shelving space for high use collections, and group study rooms.
- Collections – Bringing related collections together will better support interdisciplinary research, enhance browsing, and result in users finding more material they need in one location. Students sometimes find they need to visit several different library locations to get print reserve materials. Consolidating reserve materials from the five branches and Natural Sciences into OUGL means students will find more of what they need in one place.
- Capacity building - Branch library staff who are no longer responsible for managing branch library facilities and collections will be able to devote more of their time to the direct provision of current and emerging services to users.

### *Consolidation Concerns*

Subject-specific branch libraries, located near or in the same building as the academic programs they serve, are highly valued by their users for their personalized services and convenient locations. They and their staff tend to become part of the local ecosystem. Many of our branch librarians, especially in the Science disciplines, have been innovators and leaders in the migration toward a primarily virtual library and other changes in scholarly communication. During our unit discussions with branch staff, the following issues were identified as needing to be considered in the event of branch closures.

- Branch libraries play an integral role in the life of academic units. Even if on-site use has declined over the years because of the increased availability of content online, branch libraries are highly valued by their primary users.
- Branches are also highly valued for their convenience and proximity to academic units. They are close enough to classrooms, labs, and studios that faculty and students can stop by on their way to class to pick up materials, print a document, or use a photocopier. Operating in close proximity to each other also enhances both formal and informal communication between library staff and departmental faculty.
- Branch library staff are often able to provide customized services that may be unavailable in larger units. Staff can often reprioritize their work to accommodate last minute reserve requests. Periodical collections can be shelved in a way that best meets local needs - by title, keyword, or call number. Some science branch libraries, including Chemistry and Physics-Astronomy, also issue or work with departments to issue library keys to graduate students and faculty for after-hours access. Consolidating those two units into a facility with no special access for primary users is an issue that will need to be addressed.
- In this budget environment, branch staff also expressed concerns about reassignments and the potential for layoffs. This is another consolidation issue that will need to be given careful consideration and handled with sensitivity.

### **X – New Models of Service Delivery - Looking Forward**

The current budget crisis and the need to find immediate economies will only accelerate the changes we would have made more slowly over time. Consolidation will help us reduce ongoing costs and incrementally improve services but, in order to really meet the evolving needs of our

users as creatively, efficiently, and effectively as possible, the situation also demands deeper, more transformative changes in the ways we do business and make decisions.

Because of the Task Force's relatively short time frame and the need for the Libraries to make budget reductions this spring, we have focused most of our efforts on service point consolidation recommendations, the major thrust of our charge. This is a critical step toward redefining our service models, but the question of how other approaches toward service delivery should evolve and differ from old service models is even more important. As the staff decreases in number and we adjust our physical footprint on campus, we need to remain future oriented and continue to focus on those services that will help us realize the promise of the "any time, any place library" by continuing to deliver high value content and remote services.

In our Task Force meetings with units and committees, we asked staff for their ideas about creative approaches to providing services and collections to meet current and emerging needs. The following represents some of the ideas we heard most often or seemed to offer the most promise as new models.

- The single most noted issue, across the range of units and committees that we interviewed, was the need for a variety of study spaces for students, from dedicated eating areas and social, collaborative places where noise is acceptable, to quiet spaces for individual study.
- Tools are needed to enable library staff to provide more effective, efficient subject and class guides, accessible to librarians who aren't web designers or HTML coders. Particularly as librarians increasingly move towards more active liaison relationships with faculty and students in their departments, their web presence needs to be more consistent and scalable.
- Virtual branches: The transformation of the former K.K. Sherwood Library at Harborview offers an interesting model. The new service model has a librarian working part-time from an office in part of the former library space. She works with Harborview users on an on-call basis and actively markets library services. As other branch libraries close, we could provide virtual services and on-demand instruction and consultation, perhaps through an office in the department or the former library space.
- Continue to strengthen our virtual reference services, not only chat and QuestionPoint, but also the suite of online instructional tools that support students in and out of the library, at their point of need. These are not add-on/non-essential services; they are a key public service priority across the Libraries (or should be). Move towards mobile access and services as well. As service points and branches close, provide more after-hours access to virtual reference services.
- Flexible staffing to provide more support for those highly used but understaffed units (Media, ILL, ITS, reserves processing, Special Collections, for example).
- The Pull & Scan Pilot has been wildly popular. Make it part of our permanent suite of services.
- The harmonization of Interlibrary Loan policies and practices between upper and lower campus will greatly benefit users.
- Initiate book delivery to departments; expand the delivery of physical objects to users across campus and beyond (South Lake Union, for example).

- Consolidate reserves from consolidated branches into OUGL; perhaps consolidate media from other branches into OUGL Media Center.

These ideas are useful and will help move us in the right direction, but we must approach the issues we face in a more systematic manner. The Association of Research Libraries, of which the University of Washington is a member, recently completed an environmental scan as part of its strategic planning process. *Transformational Times* provides an excellent overview of some of the major challenges, opportunities, and issues facing major research libraries in the years ahead. A few observations from the ARL scan are worth repeating here as we continue to think about new models of service delivery and our own upcoming strategic planning process.

*Libraries need to change their practices for managing traditional content and develop new capabilities for dealing with digital materials of all types, but especially new forms of scholarship, teaching and learning resources, special collections (especially hidden collections), and research data.*

*The roles and practices of scholarly communication are becoming more embedded in research practices and cultures in all fields. Librarians need a deep, up-to-date understanding of knowledge creation processes in the areas they serve.*

*There is a need to support discipline-centric, interdisciplinary data centers and/or similarly focused e-research enterprises that combine subject expertise, resources, new forms of publishing, data mining, technical scholarship, etc., for scholarship and research.*

*New relationships must be formed with faculty and students to support rapid shifts in research and teaching practices.*

*Collaborative approaches are being applied to new activities both with regard to traditional operations as well as emerging functions.*

*Accountability and assessment are essential for data-driven decision making within libraries, on campus, and with funders and policy makers.*

*In some instances, library staff engaged in information literacy efforts will spend less time in classrooms and lecture halls in face-to-face instruction, and more time creating learning objects and tutorials, video- and multi-media based instruction components, and asynchronous instruction.*

*Future success, in part, will be fostered by the adaptability of staff; the recruitment of differently skilled staff; the reorganization of library work and services around emerging academic, research, and learning practices; and a commitment to experiment, innovate, and take risk.*

The economic downturn and the budget reductions we face present unprecedented challenges, but the situation also offers unprecedented opportunities for us to re-imagine and redefine our services to meet the needs of both current and future generations of researchers and learners. The decisions we make now about the way we deliver services and organize ourselves to provide those services to users will shape the University Libraries for years to come. We must look ahead and maintain a disciplined institutional focus on critical strategic and operational service priorities and retire less important legacy services. Our resources are not infinite and the choices we make about what we will not do are just as strategically important as those we will do.



**Appendix 1. Branch Metrics 2008**

	Circ/Main	Gov Pub	Maps	Mic-News	Nat Sci	Ref/Res	Special	SUZZ-ALL	OUGL	Media	OUGL ALL	Health Sci	ALL
<b>SERVICES/USE 2007-08</b>													
In-Person ref queries	4,104	3,710	1,337	6,358	4,335	14,988	6,230	41,062	14,839	2,442	17,281	9,190	67,533
Gate Count								1,489,226	1,793,932		1,793,932	276,284	3,559,442
Hours (academic year week)			56				40.5	86.5	138	98	138	79.5	
Photocopies (self-serve)	193,228	20,745	26,999		84,079	92,323		417,374	177,130		177,130	392,883	987,387
Initial circulation	209,184	6,717	2,766	2,496	19,602	8,107	95	248,967	114,827	92,502	207,329	17,042	473,338
In-Library Use	73,268	16,869	5,870	38,056	10,794	9,518	23,901	178,276	19,793	12	19,805	53,541	251,622
Reserves		3,366		3,237	57			6,660	29,184	24,747	53,931	2,732	63,323
<b>All use (excl. renewals)</b>	<b>282,452</b>	<b>26,952</b>	<b>8,636</b>	<b>43,789</b>	<b>30,453</b>	<b>17,625</b>	<b>23,996</b>	<b>433,903</b>	<b>163,804</b>	<b>117,261</b>	<b>281,065</b>	<b>73,315</b>	<b>788,283</b>
<b>STAFF (permanent lines)</b>													
Librarians	0	4	2	2	5.65	10.4	6	30.05	8	1	9.0	12.8	51.85
Classified/Professional	9	4	0.5	2	3	5	10.8	34.3	12.25	2	14.25	22.9	71.45
Hourly FTE (base alloc.)	12	2.2	0.8	2.5	2.1	3.4	6.5	29.5	6.9	3.4	10.3	4.1	43.9
<b>Total Staff</b>	<b>21.0</b>	<b>10.2</b>	<b>3.3</b>	<b>6.5</b>	<b>10.75</b>	<b>18.8</b>	<b>23.3</b>	<b>93.85</b>	<b>27.15</b>	<b>6.4</b>	<b>33.55</b>	<b>39.8</b>	<b>167.20</b>
<b>FACILITIES/EQUIPMENT</b>													
Assignable SF (SIMS 2007)								352,395	86,792			58,848	498,035
Seats (general, 2002))													
Shelving (linear feet, 2002))													
Access Plus workstations													
Cataloged Volumes													
<b>PRIMARY USERS</b>													
Undergrad Majors (06-07)													
Graduate Students 06-07													
Faculty (2007)													
<b>In-Library Survey (2008)</b>													
<b>Number respondents</b>								1229			741	298	
Undergraduate Students								72.5%			91.8%	27.2%	
Graduate Students								15.5%			5.2%	56.7%	
% UG in primary programs													
% Grad in primary program													
Asked for help								8.9%			5.0%	5.4%	
Looked for material								17.4%			5.7%	15.8%	
Worked alone								67.5%			61.5%	58.7%	
Used library computer								44.5%			65.3%	64.1%	
On-Site collection importance								4.04			3.95	3.98	
Staff assistance importance								3.81			3.68	3.89	
Open hours satisfaction								3.66			4.53	3.51	

Annual Unit Costs and Moving Costs

23-Apr-09	Drama	Fish/Ocean	Physics-Astronomy	Chemistry	Social Work	
<b>ANNUAL UNIT COSTS</b>						
Staff Costs	\$92,088	\$125,568	\$77,904	\$95,700	\$92,028	\$483,288
Hourly Costs	\$13,387	\$9,400	\$13,500	\$18,000	\$17,785	\$72,072
Operations						
Facilities Support (equipment/furniture replacement, delivery, etc)	\$7,000	\$7,000	\$7,000	\$7,000	\$7,000	\$35,000
3M Maintenance	\$1,682	\$1,682	\$3,364	\$0	\$1,682	\$8,410
Telephones	\$800	\$980	\$860	\$800	\$490	\$3,930
Access Plus	\$3,960	\$5,280	\$0	\$0	\$4,730	\$13,970
Total Operations	\$13,442	\$14,942	\$11,224	\$7,800	\$13,902	\$61,310
<b>TOTAL</b>	<b>\$118,917</b>	<b>\$149,910</b>	<b>\$102,628</b>	<b>\$121,500</b>	<b>\$123,715</b>	<b>\$616,670</b>
<b>MOVING COSTS</b>						
Volume Count	40,754	76,359	28,376	45,170	36,556	227,215
Cost to move to Kane at \$.25 per volume	\$10,189	\$19,090	\$7,094	\$11,293	\$9,139	\$56,804
Cost to move to Suzzallo/Allen at \$.25 per volume	\$10,189	\$19,090	\$7,094	\$11,293	\$9,139	\$56,804
Movers- Furniture	\$2,400	\$3,600	\$2,400	\$2,400	\$3,600	\$14,400
Shelving takedown and moving (PW 4/9 doc)	\$2,892	\$11,055	\$5,614	\$9,147	\$5,609	\$34,317
Security taping (Chemistry only) 25% of collection				\$2,372		\$2,372
<b>TOTAL UNIT-SPECIFIC MOVING COSTS</b>	<b>\$25,669</b>	<b>\$52,835</b>	<b>\$22,202</b>	<b>\$36,504</b>	<b>\$27,487</b>	<b>\$164,697</b>
<b>ADDITIONAL CONSOLIDATION RELATED COSTS</b>						
Costs to Shift Material in Kane Hall twice	\$10,000					
Costs to Move NSL Storage to SP	\$13,000					
Costs to Shift and Integrate Material into the Main Collection - includes integration of NSL, Per., Children's Lit and 5 branches	\$65,875					
Reclass some Deweys Shelved in Open Collections	\$10,000					
Costs to Shift Material at Sand Point	\$10,000					
Costs for New Sand Point Shelving (it may be possible to use F/O or other shelving which would reduce the cost)	\$95,610					
Web Services changes	\$4,500					
Maps and ILL change places (2010)	\$21,840					
<b>TOTAL</b>	<b>\$230,825</b>					
<b>TOTAL MOVE AND MOVE-RELATED COSTS</b>	<b>\$395,522</b>	<b>( Dean's Budget Report to the Provost estimated \$395,000 for 5 unit moves)</b>				

**New Models of Service Delivery Final Report**  
**Appendix 3**  
**Consolidations and Collection Space in Suzzallo/Allen and Sand Point**

The consolidations that are recommended in the report will significantly change the arrangement of the Libraries collection and the shelving inventory; this will in turn have an impact on Libraries shelving capacity and potential future growth of the collections. During the planning for consolidations, one goal was to allow for at least five years growth for all the consolidated collections using the space in the new combined Suzzallo and Allen collection and Sand Point. After the recent Sand Point project other units, not affected by consolidation, should have growth space for five years.

The collection space for the newly integrated Suzzallo and Allen collection is somewhat hard to predict, as some shelving will be removed for additional user seating or for new services such as the Research Commons. It may also be possible to install more shelving in some areas such as the current Periodicals Display area in the Suzzallo 3<sup>rd</sup> Floor, but it is more likely that the shelving inventory in the two buildings will be reduced.

There is currently space in Sand Point for an additional 90,000 volumes due to the transfer of archival theses to Allen B2. To facilitate the additional volumes from merged units we will need to install compact mobile shelving in the last remaining empty bay in the Baker Auxiliary Stacks. A new shelving bid proposal of \$95,609 has been received from TAB for this bay. This shelving would provide space for an additional 30,000 volumes. We are also looking at the feasibility of using some existing static shelving that will soon be moved from the Foster Business **Library** to Sand Point and perhaps using some of the compact shelving in the Fisheries and Oceanography Library. It may be possible to install additional Fish/Ocean compact shelving in Auxiliary Stacks space **to replace** existing static shelving.

**Table 1 - Space for Collection Growth as of January 1, 2009**

<b>Area</b>	<b>Additional Volume Capacity</b>
Suzzallo/Allen Stacks (4 <sup>th</sup> Floor)	200,000
Suzzallo/Allen Stacks (other floors)	250,000
Suzzallo Periodicals (3 <sup>rd</sup> Floor)	50,000
Natural Sciences	30,000
Sand Point – Auxiliary Stacks	90,000
Sand Point – Baker Auxiliary Stacks (with new shelving)	30,000
<b>TOTAL</b>	<b>650,000</b>

**Table 2 - Sizes of External Collections to be Consolidated into Suzzallo and Allen as of 4/1/09**

<b>Collection</b>	<b>Volumes</b>
Chemistry	45,169
Drama	40,772
Fisheries-Oceanography	76,429
Physics-Astronomy	28,396
Social Work	36,566
Children's Literature	46,894
TOTAL	274,226

**Table 3 - 5 Years Growth for Consolidated Collections**

<b>Collection</b>	<b>5 Years Growth in Volumes</b>
Suzzallo/Allen Collection	250,000
Natural Sciences	17,500
Periodicals	24,000
Chemistry	2,500
Drama	3,500
Fisheries/Oceanography	7,500
Physics-Astronomy	3,000
Social Work	5,000
Children's Literature	3,000
TOTAL	316,000

For purposes of five year planning, we will remove all Allen Ground shelving (76,000 volumes) from the current shelving inventory but leave all other shelving in what is now the Suzzallo-Allen Stacks, Periodicals and the Natural Sciences Library. This will give us a capacity at 100% full for an additional 574,000 volumes (the total from Table 1 minus Allen Ground shelving capacity). However, the actual maximum capacity for a working publically-accessible collection is 85% which would give us **an** additional volume capacity of 487,900 volumes. As shown in Table 2, we expect 274,226 volumes to be consolidated into Suzzallo/Allen and/or Sand Point. Table 3 shows the expected growth of all collections over the next 5 years. Adding the volumes from all the consolidated collections with expected growth of all collection for five years, we will need space for 590,226 volumes by 2014. Table 4 shows that we will have a shelving shortfall of more than 100,000 volumes if all calculations and predictions are accurate. The shelving shortfall can be mitigated by not moving all consolidated units, **discarding** duplicates, removing serial volumes held by other Summit libraries, adding additional shelving in the Suzzallo and Allen Libraries and adding additional compact shelving at Sand Point. Current

budget reductions should also have an impact on the growth of collections that could give us additional time to capacity.

**Table 4 - Suzzallo/Allen and Sand Point Shelving Requirements through 2013**

85% Shelving Inventory w/o Allen Ground South	487,900 volumes
Volumes from Consolidated Units	274,226 volumes
5 years growth	316,000 volumes
Shortfall	100,622 volumes

## **New Models of Service Delivery Final Report**

### **Appendix 4**

### **Research Commons White Paper**

As we continue on our path to creating the Anytime, Anyplace library through more and better virtual services and collections, our physical spaces are also undergoing significant transition. The Libraries facilities have been shifting from a focus on providing access to physical collections to a more dynamic place for discovery among our communities of students. In fact, during our unit interviews around campus, a recurring theme that emerged was the need for more study space for group work. To proactively address this increasing need for collaborative, flexible space for study and learning, the Task Force recommends the establishment of a Research Commons on the ground floor of Allen South. Internal partners will include, among others, Science librarians, Reference & Research librarians and Information Technology Services.

The proposed Research Commons will be an interdisciplinary place for advanced researchers to collaborate and create. There, they'll have opportunities to consult with librarians, use specialized equipment and software, and conduct intensive research in a dedicated room. Prospective users include upper-division undergraduates, graduate students and faculty and staff in all disciplines. Allen Library South ground floor will be repurposed to house the Research Commons. Of necessity, the Commons will open with some but not all of the planned services. Focused interviews with clientele should be held in order to determine the optimum configuration of hardware, software and services. For example, students working on Task Force assignments in the Jackson School of International Studies, which require a great deal of collaborative research, study, and presentation practice, might serve as exemplars around which to design services and facilities. Other potential audiences might be students with capstone requirements.

In developing an outline for a Research Commons, we consulted the literature and university libraries' Web sites. The concept is not yet developed to the extent that an Information Commons is, but is gaining ground across the nation. The Libraries' Research Commons is not intended to duplicate services offered by the Odegaard Undergraduate Library. The space would not be configured as a traditional computer lab. Rather, the space will be furnished with easily movable furniture, allowing for changing needs of study groups. Computers will be clustered and provide adequate workspace for a researchers who plan to spend significant time on their projects. Outlets, study tables, and oversized monitors would allow for laptop users to work together. Additional technologies and separate rooms will be devoted to a presentation studio, quiet space for intensive research, and collaborative spaces for group work. Software offerings might include statistical and mathematical programs, transcription tools, and tools for authoring interactive texts.

The Research Commons would not be heavily staffed, and in fact, would not include a fixed reference desk, as in a traditional reference or learning commons space. Rather, it would be an integrated service environment in which users could access our virtual services for their less intensive information needs, with additional space for one-on-one or group consultations with a librarian when more personalized research service is required. Additional creative staffing

models could be considered, such as ‘roving’ reference librarians or mechanisms for contacting an on-call librarian for more in-depth reference needs.

Consultation services will include a mix of several existing programs and new offerings. Possible candidates for inclusion in the Research Commons program include the Grants Funding and Information Service, instructional services, and eventually, support for collecting, managing, preserving, and sharing data. The Task Force envisions that the Research Commons’ space, facilities, and services will evolve, as do many of our spaces, as we continue to assess needs and make adjustments accordingly. In this way, the nascent Research Commons program will continue to develop over time, in response to assessment data, as funding becomes available.

An implementation group would consult broadly within the Libraries and the UW to develop a suite of consultation services and software, and to design the space. The lists below represent possible partnerships and services to consider.

Partnership opportunities for the Research Commons could include:

1. Digital Initiatives
2. The Graduate School
3. Grant Funding Information Service
4. International Studies Librarians
5. Libraries’ Copyright Officer
6. Scholarly Communication committee
7. Teaching & Learning Committee
8. UW Office of Research
9. UW Press

New or expanded services could offer expert consultation on a range of digital research concerns, including:

1. Copyright
2. Data curation: collecting, managing, preserving and sharing data
3. Digital media
4. Digital publishing
5. Electronic theses and dissertations
6. GIS
7. Grants: finding grants and completing applications
8. Institutional repository
9. Instructional services
10. Intellectual property
11. Managing personal research collections
12. Referrals to other UW offices or programs
13. Scholarly communication
14. Scholarly talks
15. Short courses on citation management, open access, copyright, etc.

Eventual hardware purchases include large screen televisions to use as monitors, projectors, a color printer and color plotter, and white boards. A wide range of software will be needed, including:

1. Annotation and note-taking tools
2. Authoring interactive texts
3. Data analysis
4. Data mining
5. Digitize and edit audio and video
6. Electronic publishing
7. File conversion
8. Networked Digital Library of Theses and Dissertations, a system developed at Virginia Tech for submitting dissertations electronically. <http://www.ndltd.org/> and <http://scholar.lib.vt.edu/theses/>
9. Statistical and mathematical
10. Transcription tools, transcribe spoken words to machine-readable text.

## New Models Report – Appendix 5

### Unit Snapshots and Meeting Summaries

Summary data from statistics compiled by the Library Assessment and Metrics Team and from the New Models Task Force meetings with Library units are posted on staffweb at the following URL:

<https://staffweb.lib.washington.edu/committees/new-models-of-service-delivery-task-force/unit-snapshots>



January 14, 2009

**To: Task Force on New Models of Service Delivery**  
 Gordon Aamot, Head, Art, Architecture and Business Libraries (Chair)  
 Amber Brock, Library Technician II, Foster Business Library  
 Thom Deardorff, Coordinator of Access Services  
 Emily Keller, Political Science and Public Affairs Librarian  
 Ryan McCrory, Access Services Manager, Odegaard Undergraduate Library  
 Louise Richards, Head, Fisheries-Oceanography Library  
 Sion Romaine, Assistant Head, Serials Acquisitions  
 Paula Walker, Director, Libraries Space Planning  
 Ann Whitney, Head, Systems, Health Sciences Libraries

**From:** Lizabeth (Betsy) Wilson   
 Dean of University Libraries

**Subject:** Task Force on New Models of Service Delivery Charge

Thank you for agreeing to serve on the Task Force on New Models of Service Delivery. You are undertaking work of critical importance to the future of the Libraries and to our ability to meet the evolving needs of our users as creatively, efficiently and effectively as possible. While the current budget situation has brought the need for change into sharper focus, and has perhaps accelerated the rate of change, the Libraries has long identified the establishment of fewer, more consolidated service locations with electronic distribution of many services to the desktop as a key strategic direction. At the same time, our users are asking for new services from us, from scan on demand to data curation, and we must create the capacity within our organization to meet these new challenges.

Your charge is to review the data assembled by the Assessment and Metrics Team, as well as any other information you believe is relevant, and to recommend to me which service points within the University Libraries could be merged into larger units, reconfigured or discontinued. You should cast a broad net, looking at all Libraries service points and shelving locations except UW Bothell and UW Tacoma.

As you know, there are a variety of reasons for embarking on this work today, a few of which are outlined below:

- The Libraries' strategy of reducing the number of library service points and collection locations (see attached timeline)

- The continued heavy use of the physical library by undergraduates
- The ability to deliver a increasing number of resources and services electronically, and the subsequent significant increase in remote use of the Libraries
- The availability of the Sand Point off-site shelving facility
- A steady and significant decline in the use of print collections in many disciplines
- A marked decrease in the number of graduate students and faculty using onsite library collections and services
- An increase in the growth of multidisciplinary research and teaching
- A deteriorating budgetary environment that has recently worsened, probably requiring substantial cuts in the 2009-2011 biennium.

As part of this review of service and collections configurations, I am asking that you recommend changes that could better support current and emerging user needs in the most cost-effective manner. These changes should include some, but perhaps not all, of the following:

- Consolidation of service points and/or collections within a facility
- Consolidation of branch libraries into the Suzzallo and Allen Libraries, Health Sciences Library, Odegaard Undergraduate Library (OUGL) or other location
- Merger of branch libraries
- Alternative collection housing recommendations such as compact shelving and additional relocation to the Sand Point off-site shelving facility
- Ways to use current library space more effectively
- More innovative and efficient ways to deliver services to users, including virtual services and delivery to the desktop or office

The budget situation is dynamic and although we currently are planning for a cut in the range of 8%-12%, we will not know the extent of the reduction for some time. Given the number of unknowns, it is important to present several scenarios which provide a range of options—from small, to medium to large. For example, a scenario at the “small budget cut” end of the spectrum might recommend merging two service units into the Suzzallo and Allen Libraries and consolidating a branch library into the Engineering Library while at the “large budget cut” end of the spectrum, the recommendation might be to consolidate five or six branch libraries and eliminate a number of service desks in Suzzallo and Allen, OUGL and/or Health Sciences. Please include at least a couple of scenarios representing each of the budget cut possibilities (i.e., small, medium and large). As you work through these scenarios, I expect that you will consult widely within the Libraries.

I ask that you provide estimates of cost savings or expenses that would accompany the changes recommended. Please identify one-time costs associated with making the changes, as well. If it is not possible to provide cost estimates, please identify cost elements to the extent that they are known.

In addition, please recommend a timeline and sequencing for consolidations and mergers that takes into account the need to move collections, relocate staff, and change records. I expect that you will consult with staff in RADITS and other appropriate units as you make these recommendations. As you prioritize the order of operations, please note the units in which you recommend that we make permanent strategic investments

and those that could be consolidated, even if the consolidation(s) may not happen immediately.

I encourage you to take a Libraries-wide perspective, to be mindful of the Libraries' commitment to high quality, user centered services, and to seek innovative and cost-effective ways to meet current and emerging needs. Given the need for timely decision-making, I ask that you consult regularly with Associate Dean Cynthia Fugate and Acting Associate Dean Neil Rambo who will keep the Libraries Cabinet and me informed of your progress. Please submit a draft or outline of your recommendations by mid-March so that I can review the direction you are taking. The final report will be due to me in mid-April.

Chair Gordon Aamot will contact you concerning the work of the group. On behalf of the Libraries Cabinet, I thank you for the energy and insight you will bring to the important and critical work of the task force.

Cc: Libraries Cabinet  
Jill McKinstry, Director, Odegaard Undergraduate Library  
Laurie Sutherland, Head, Serials Acquisitions  
Nancy Huling, Head, Reference and Research Services  
Mel DeSart, Acting Head, Science Libraries and Head, Engineering Library  
Elaine Jennerich, Director, Organization Development and Training

## **New Models of Service Strategy Timeline**

### **University of Washington Libraries January 2009**

In the mid-1990s, as it became apparent that a significant number of users preferred desktop delivery and that the availability of a critical mass of online content would allow us to reassess the balance between our physical collections and service points and our virtual presence, the Libraries began to articulate a strategy that called for consolidating service points.

- The *Task Force on Service Location Evaluation* (1994) recommended that the Libraries strategically move in the direction of a library system predicated on fewer, more consolidated physical locations that take advantage of network infrastructure and electronic information systems to customize and deliver services directly to the desktop while still recognizing the value of the library as place.
- Based on the Task Force on Service Location Evaluation report, the Geography, Political Science, and Philosophy branch libraries were consolidated into the Suzzallo/Allen Library in 1995.
- The University provided use of the Sand Point facility as an off-site shelving location initially as surge space during the Suzzallo Renovation (2000-2002) and subsequently as a permanent shelving location for lesser used materials.
- The *1999-2001 Facility Master Plan Update* presented a vision of a library system which occupies fewer, more consolidated locations, and includes as a cornerstone, electronic distribution of many services to the researcher's desktop in the faculty office, the residence hall, and the home. The Master Plan proposed the merging of the Art, Drama, and Music Libraries into a consolidated Fine Arts Library and the merging of the Forest Resources, Fisheries-Oceanography, and Natural Sciences Libraries into a consolidated Natural Sciences/Natural Resources Library.
- A 2002 review of library service points and collections locations confirmed that the trends predicted in the 1999-2001 Facility Master Plan had accelerated, especially in the Sciences.
- In 2002 the Libraries identified the creation of a new Fine Arts Library as a priority capital project and development of that project is continuing.
- In 2004 the Forest Resources Library was merged with the Natural Sciences Library.
- The 2007 Biosciences Resources and Services Planning Task Force Report brought into sharper focus the ways in which the research landscape has changed and noted that "the network of branch libraries based on separate collections in related science areas is cited by faculty and students a hindrance to multidisciplinary work at a time when online access transcends discipline-based collections."
- The 2008 Suzzallo and Allen Libraries Space, Services, and Collections Review Committee presented several visions for reconfiguring space and services and suggested a number of service point consolidation ideas.
- In 2008 the Suzzallo Periodicals Desk was closed, based on information in the SSACR report.
- The Sand Point Shelving Facility was expanded significantly in 2008, currently housing 1.2 million volumes and 19,000 archival boxes.
- Libraries' facilities planning has also taken into account user feedback from our assessment activities. As information technology has become more readily available and easy to use, people

## Attachment 1

are changing the ways in which they perceive and use libraries. The Libraries' goals of promoting user self-sufficiency and providing access to and delivery of information resources to the desktop have enabled many University of Washington faculty and students to do their library "work" without coming to the physical library. As we know, the Libraries web presence is actually our busiest service point. In fact, since 2001 results from the Libraries Triennial Surveys and In-Library Use Surveys have revealed that faculty were far more likely to use the library remotely than visit in person and there was a steep drop-off among graduate student in-person visits, especially among those in the sciences and engineering. At the same time, use of library spaces by undergraduates has remained strong or increased.

- Appointment of the Task Force on New Models of Service Delivery in January 2009.

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