

Response to the External Review Report

March 2015

The External Review Report, dated December 2014, has many positive things to say about the collections, services and facilities of the Library, which speaks to the dedication and expertise of Library staff. The Library has also acquired an excellent global reputation over the past five years for innovation and leadership. The faculty and students as well as donors, friends and the external community are generally very satisfied and excited about the vision and directions set by the Library. These are gratifying observations made about the Library.

There are however several observations made in the External Review that will need attention, some more immediately than others. These observations generally relate to the internal operations and workplace culture of the Library. This situation has been evident within the Library for over two decades. The current Library administration has taken steps on many fronts to address the internal malaise of the Library, but more needs to be done, and will be done.

It is of note that the External Review observations are directed at all levels, from the University Librarian, the Deputy University Librarian, the Associate University Librarians, managers and all staff, as well as to the office of the Provost, and the Finance and central IT portfolios. In order to address and resolve the issues raised in the Report, a focused, multi-prong approach will be necessary involving all staff and stakeholders.

The Report of the Review Committee does not present Recommendations but rather several observations and suggestions for next steps. This response will be divided into two sections: the first one outlines actions already underway that address the Report's findings, and the second one describes actions that will be prioritized for the coming year.

Library Workplace Culture

The Library employed the services of an internationally recognized consultant group to address persistent negative issues in the workplace. Their roadmap of recommendations, delivered in December 2013, is being followed according to a

plan over two to three years. Since that time, a number of outcomes have been achieved:

- The development and implementation of the Library's aspirational values and behaviour statements;
- The development a new Standing Committee structure;
- The senior management team is making a concentrated effort on working as a team and have participated in various retreats and meetings.

Progress has been made but much more remains to be done. The external consultants had indicated that this behavioural shift could take up to two years of concerted effort.

We strongly agree that the University Librarian and the senior management team take ownership of the morale issues and that every employee make it a priority to create positive change. Steps are being taken to do so, and will be accelerated.

Leadership team and the Role of the University Librarian

A key recommendation from the Library's Workplace Culture Review was to "strengthen the cohesion of the senior management team." Although this work may not be visible to the organization, members of Lib-Exec have participated in a number of retreats and meetings to identify ways that we can support and connect with each other in achieving our goals and priorities, in the service of the organization and not individual portfolios.

Work has already begun to clarify the roles of the University Librarian, the Deputy University Librarian, the Associate University Librarians, and the financial reporting lines to the Office of the Provost. We agree that clearer lines of accountability throughout the organization need to be established. The new Standing Committee structure will also contribute to clarifying decision making in the Library.

The University Librarian's presidency with the International Federation of Library Associations began in August 2011 and ended in 2013. In September 2013, the Provost named a Deputy University Librarian for a five year term, and it was expected that the Deputy University Librarian would be responsible for internal operations (COO) whereas the University Librarian would be responsible for strategic planning, budget oversight, fundraising, and external activities of various

kinds (CEO). In addition, the University Librarian remains accountable for the Library overall. This was the first time that a long-term Deputy University Librarian position was created at UBC and therefore the separation of duties and operations of the Library were in transition and adjustments were made throughout the last year. However it appears that the duties of the both positions were not well articulated for staff and stakeholders. The external review report suggests that the University Librarian should be more engaged internal to the library. How that will develop along with the Deputy University Librarian's duties will be further discussed with the Provost.

Communication and Consultation

There can never be enough communication within and external to an organization. The need for timely and clear communication is very important, and is borne out in several parts of the Report where certain misperceptions can be eliminated through more proactive communications. The Library's Communications Office was created four years ago in recognition of the importance of coordinated and clear communications support. Attention will be given to increasing the ability of the office to perform effectively. However the University Librarian must also use other means for communications, including getting guidance and support from the senior administration especially for external communications.

Given the Library's enterprise-wide position on campus, consultation is a constant. Relationship building with faculties and external stakeholders is critical for us, whether it be to receive feedback on collection renewals or suggestions of facility use. Both the Senate Library Committee and the Library's Student Advisory Committee are good avenues for connecting with faculty and students. More can be done to foster Library advocates and allies in support of building the Library's reputation and this is an expectation I would have of senior management as well as all of our staff.

The Library is proceeding with planning for new programs and services in the Koerner Library which the Report notes should be done in consultation with faculty and other stakeholders. This is our intention. In the past year extensive consultations with faculty have taken place for two major activities.

Setting the direction and vision for the Library is an inclusive process and all staff were given the opportunity to participate in the development of the Library's

2010-2015 Strategic Plan. Other campus stakeholders and the external community also were invited to provide input. The next Strategic Plan will be an extension of the current one, and it is our intention to do the same broad consultation to help inform the development of the goals and direction of the Library.

Budget

The Library budget model has been of concern to the UL and the senior team for several years. Many attempts have been made to present this serious problem of declining purchasing power for the Collections budget, as well as the declining ability to fill important positions, to senior university administrators over the past several years. This has led to an ongoing annual increase of 2% to the Library's Collections budget which, while helpful and appreciated, does not meet the increasing costs of collections to the Library and does not address the increasing annual costs of existing salaried employees.

The External reviewers have pointed out the dropping ranking of UBC Library in several areas of budget related comparisons in relation to its 115 peers in North America. While Library administration has made several submissions to senior university administration regarding the unsustainability of the Library's budget, in particular during the annual budget submission over the past few years, we will continue to make the case for the urgent need to determine a sustainable budget model for the Library, which is experiencing increasing costs and yet has no readily apparent opportunity to raise revenues.

Staffing

The development of a comprehensive staffing plan, also recommended by the Workplace Culture Review, is in our forward plan, and will be carried out as soon as possible. Any changes made to the Library's budget model will also have an impact on this staffing plan. In order for a staffing plan to be developed, there needs to be an understanding of what the Library's workforce will look like over the next five years – what kinds of new work will emerge, how do we align resources to support the University's goals, and what kind of new skills will our workforce need. The Report notes that staff are willing to accept change, to embrace retraining and new opportunities, and the reallocation of resources. Several training and retraining programs have been implemented and many staff at all levels have participated in them.

Long term acting positions are sometimes necessary for operational or budgetary reasons, as pointed out in the External Review report. Because of the university mandated requirement to achieve a balanced budget by 2014/15, which will be achieved, every vacant position is carefully reviewed as to whether it needs to be filled and if so, whether some duties could be adjusted. This takes time and effort. However the point is taken that reasons for staffing decisions be communicated clearly and quickly to staff.

There have been several staff departures over the past few years, some for very personal reasons. This needs further analysis and HR and the senior team will review the numbers and take steps necessary to improve the situation. The Library HR Dept. will look into setting up a more formal process for doing such exit interviews.

Partnerships

Given the Library's close contacts with many external libraries and consortia, it is surprising to see the observation that UBC Library is not interested in partnerships that further access to information for all citizens of BC and Canada. This is absolutely not true, and one only needs to look at the efforts of the Irving K. Barber Learning Centre to provide information resources to the province, the active digitization projects undertaken by the Digitization Centre to make important information resources available online for all to freely access, and the recent joint purchase with other university libraries of a major vendor's entire run of information products so that they can be made freely available to not only campus users but to all BC schools and residents. We will look into the reasons for this observation.

We are also working with UBC faculty and within regional and national projects on data storage and management issues, and we are committed to building a data management service on campus.

OTHER ACTIONS THAT WILL BE ADDRESSED DURING THE COMING YEAR:

The Library has been involved over the past year with addressing the needs of the faculty and students of Vantage College for services and information access within

its resource constraints on incorporating any new major program. Further discussions with the leadership of Vantage College will take place.

Medical education and research is a very important program at UBC. Implementing a successful virtual service that will meet the needs of students and faculty who learn and work at a distance from the UBC Point Grey campus needs additional effort. The Library will work closely with the stakeholders in this area to further develop and refine the service model.

The Library has enjoyed a strong relationship with the iSchool, providing a number of co-op positions to students, many of whom become part of our permanent staff. Recent joint activities have included collaborations on Aboriginal initiatives, hosting of international conferences and meetings, and the increased presence of our Library staff who teach at the iSchool. A discussion with the iSchool Director on other forms of partnership will be initiated.

It is gratifying to see the importance that the External Reviewers place on information and information technology in the Library context, how unique the library IT needs are from other campus units, and how important it is to have professional librarians involved in managing Library IT.

While a librarian no longer manages critical IT programs like the ILS, there is a librarian who provides oversight of IT functions, new software developments, and planning for new systems. With the transition of Library IT to UBC IT, a Systems Librarian remained with the Library, and an Associate University Librarian was given overall responsibility for systems governance. Major systems decisions and purchases are approved by a joint Library/IT governance team, but the Library retains responsibility and control over financials and priorities. The integration and partnership are still undergoing adjustments, and more clarity on roles and decision making will take place over the next several months.

Regarding the recommendation to sign a Service Level Agreement with central IT, such an agreement is currently being developed and will be brought forward to senior management in April and May for approval. We also agree that an Information Technology plan be developed.

We will continue to discuss the issue of including the Library on the university's home page (ubc.ca) with Central Communications. Librarians are involved in managing and updating the library website.

Conclusion

This external review report is welcomed as a call to continue, in a more focused and timely way, to make adjustments to several activities and structures internal to the Library, as well as relationships with other areas of the University and with the broader community. The suggestions made for future action will be followed up. But especially important for immediate action are the observations made around staff morale and workplace culture.

The University Librarian will focus on providing leadership to address the "persistent negativity" evident in the workplace, and on improving communication internally and externally. The University Librarian also accepts the comments made about being more present in the workplace, and commits to doing so. More visible presence of all managers will be encouraged as well. The observations made in this report, and the follow up actions that will be taken, will build on the many achievements of the Library to take it to a new level, by having all our staff working together in a respectful and productive environment, with the ongoing support of the university senior administration and other campus units.