



RUTGERS

University Libraries

Camden Town Hall: Libraries Planning Process

January 14, 2019

Agenda

- Planning Calendar Overview
- 2018–2020 Priorities Review
- Q&A

Libraries Planning Calendar

- Two-FY planning cycle (2018–2020)
- Three-phase process
 - Environmental scans & local priorities
 - Determine capacity and FY(2019) plan
 - Subsequent FY (2020) budget requests

	Libraries Activity Planning	University Budget Request Activities
February 2018		
March 2018	Perform CY17 collections and ILL cost assessment.	
March 2018	Retreat	
April 2018	Receive the working budget for FY19. Complete URA/AFT staff evaluations.	Cabinet members complete an environmental scan of space, collections, services, and infrastructure needs.
May 2018	Retreat	
May/June 2018	Directors adjust and "finalize" plans for FY19.	Cabinet develops goals and metrics for FY20. Directors propose priorities and initiatives for FY20 that are at a level sufficient to develop a budget proposal. (Last minute chance to add something to FY20 planning.)
June 2018	Cabinet adjusts and "finalizes" FY19 plans for infrastructure based on funding and Directors plans.	Cabinet reviews FY20 Directors priorities and initiatives and develops plans and requirements for the infrastructure.
June/July 2018	Complete MPSC staff evaluations.	Directors meet with CFOs to discuss local priorities for FY20.
July 2018		FY20 Library goals and metrics are submitted to SVPAA.
August 2018	Retreat	Develop specific budget requests for FY20.
September 2018	Compile data and complete statistical assessment of FY18 finances and activities.	
October 2018		Request budget for FY20
November 2018		
December 2018		
January 2019		

Phase 1 – Environmental Scans

- March: Environmental scans of needs
 - Space
 - Collections
 - Services
 - Infrastructure
- Create local plans

Local Environmental Scan Template

Unit: *Type Unit Name Here*

Collection Priorities

Priority Statement 1: *Enter Statement Here*

Required Activities:

- *List immediate next steps for addressing this priority*

Priority Statement 2: *Enter Statement Here*

Required Activities:

- *List immediate next steps for addressing this priority*

Priority Statement 3: *Enter Statement Here (add more statement sections as necessary)*

Required Activities:

- *List immediate next steps for addressing this priority*

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Phase 1 – Environmental Scans

- April: Receive working budget for next FY
- April retreat
 - What is critical for the upcoming year?
 - Determine which priorities require central support

New Brunswick Libraries
2018 - 2020 Priorities

Introduction

As New Brunswick Libraries (NBL) moves from priority planning to our 2019 work, we will keep unique Rutgers University–New Brunswick (RUNB) perspectives in mind. With RBHS we are an AAU institution. We belong to the Big 10. New Brunswick is a Land Grant institution. NBL will align its priorities with Chancellor Datta and RINB, the Rutgers University Strategic Plan, and the Rutgers University Libraries' mission and vision.

Our priorities begin with an analysis and assessment of NBL roles, functions, infrastructure and operations. The faculty and staff will spend time looking inward as well as outward to assess our current practices and suggest new ways of operating. This assessment includes a strategic planning process that will launch during FY19 Q1. While NBL 2018 - 2020 Priorities are advanced according to Chancellor [priorities](#), recurring core functions are found throughout the document: our [colleagues](#), [structure](#), [space](#), [scholarly communication support](#) and [partnerships](#).

1. Empowering New Brunswick Libraries Change

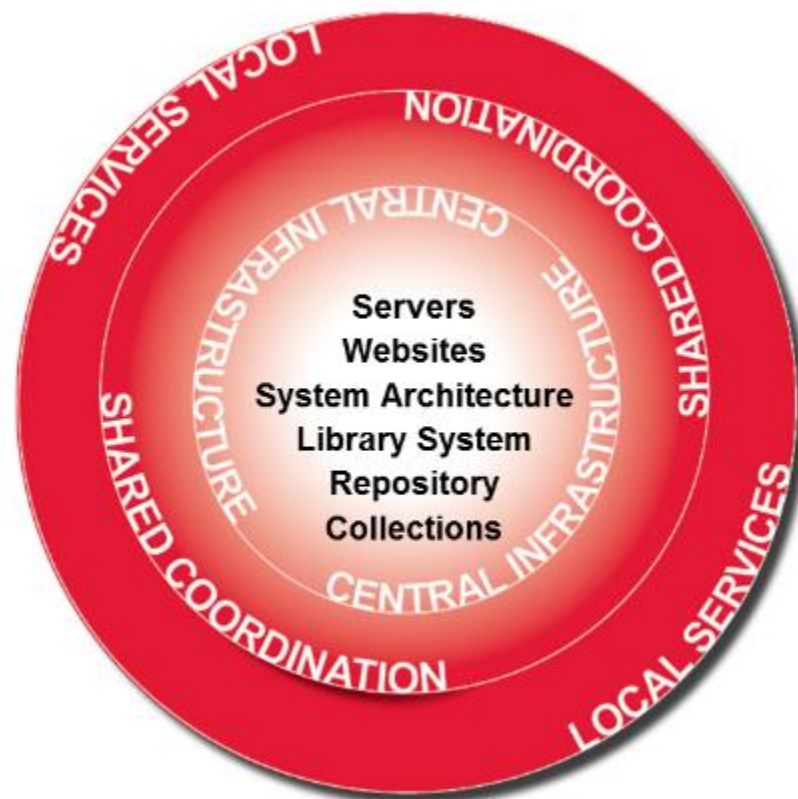
Priorities	Description	Coding	Metric
1.1 Rethink ourselves within New Brunswick	Understand our peers, our current roles, our operating opportunities.	☐ wO	Strategic planning hire consultant, create faculty/staff user teams Survey stakeholders
1.1.1 Perform external assessment	Benchmark with Big 10, AAU, Land Grant Universities. ARL on library roles, team organization, staffing structures		Benchmarking data gathered, and report created
1.1.2 Create new structure for NBL	Staffing areas, department, teams. Provide position and training opportunities around new roles.	☐	Staffing, services assessment as part of strategic planning, including service points analysis
1.2 Create communications plan	Create communications plan that maps priorities, strategies, people, resources.		Hire Communications Assistant Create communications team Create and deliver plan
1.2.1 Design & implement NBL web site	To include content for NBL such as events, development opportunities, news	☐	Project proposal created and delivered to SLIS

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Phase 2 – Determine capacity and next FY Plan

- May retreat
 - Review of local plans
 - Surface missing priorities when they are not represented locally (e.g. Alma)
 - What does central have capacity to support?
 - What moves the most people forward?



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Phase 2 – Determine capacity and next FY Plan

- June
 - Individual meetings with directors to finalize their plans
 - Negotiations based on capacity (e.g. local websites on hold)



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Phase 3 – Subsequent FY Budget

- August:
 - Look at priorities that don't have funding
 - Are they important enough to develop a budget request?
 - Can they be internally funded through reallocation of resources?
 - Should they be postponed instead?
- Requests formally submitted in October

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Phase 3 – Subsequent FY Budget

- Typically we get our budget in April, but we received FY2020 budget early
 - Flat budget, no reduction
 - No additional funding for salary increases or collections inflation
 - Hiring freeze still in effect

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Priorities 2018–2020: Overview

- Clarify communication and decision-making
- Strengthen information control
- Optimize collection development and management
- Enhance student support
- Determine strategies and capacity for advanced services
- **NEW!** General infrastructure support needs



Priorities 2018–2020: Big Themes

- Access to collections
 - Alma/Primo
- Library instruction
 - Pressbooks
 - Credo
 - Leganto
- Discovery and website modification
 - Continue developing foundational services



RUTGERS UNIVERSITY LIBRARIES PRIORITIES, 2018–2020

Priority/Activity	C/O = carry over Status
Clarify Communication and Decision-Making	
Overarching goal: To connect decisions and activities to associate university librarians, assistant vice presidents, and library directors and to improve their effectiveness and communication in the Cabinet.	
Acres has initiated in previous years:	
1. Establish unit priorities and goals, metrics, and additional budget accountability. (2016)	C/O - Organizational Planning, Budgeting, Structure (OPBS, L)
2. Align the organizational structure and budgets to critical, essential, particularly in areas of interlibrary loan, instruction, Access Services, shipping, and basic periodicals and serials services for reference and instruction, and communications and marketing support. (2016)	C/O - OPBS, L
3. Ensure the policies on the website reflect current practices. (2016)	C/O - website (ALL)
4. Align support for health sciences community on Pascatoway campus that acknowledges the funding source and the current organizational structure.	C/O - OPBS, ROLIS, NE
5. Charge a group to recommend a process to prioritize cataloging projects that takes into account the available staff.	C/O - this was put on hold until Alana implementation. Now replaced with activity that does not include a group charged by Cabinet.
6. Charge a group to recommend a transparent process to prioritize collection management projects (weeding, moves, etc) that takes into account the available staff.	C/O - This was put on hold until Alana implementation. Now replaced with activity that does not include a group charged by Cabinet.
7. Charge a group to recommend a process and template for routine digital projects.	C/O - SJS (Open) Hand off to Director of SJS to complete process.

Last updated November 26, 2018

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