



STATE  
UNIVERSITY  
SYSTEM  
of FLORIDA  
Board of Governors



September 30, 2010

Mr. Frank T. Brogan, Chancellor  
State University System of Florida  
325 W. Gaines Street, Room 1614  
Tallahassee, Florida 32399

Dr. Willis N. Holcombe, Chancellor  
Division of Florida Colleges  
Florida Department of Education  
325 W. Gaines Street, Room 1544  
Tallahassee, Florida 32399-0400

Dear Chancellors Brogan and Holcombe:

We are writing to you in our capacity as co-chairs of the Task Force on the Future of Academic Libraries in Florida. We are submitting for your information, the attached:

- The list of Task Force members
- An Executive Summary of the survey results
- A table describing the Task Force's timeline and work process
- The Vision and Mission statements
- A working outline of the final Task Force report

Members of the Task Force have had the opportunity to contribute to these initial documents, through various drafts. We look forward to providing you with additional content in December, as we divide the work among members of the Task Force.

Sincerely,

Handwritten signature of Kathy Miller in blue ink.

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Kathy Miller, Ed.D.  
Chair, FCLA Advisory Board and  
Dean of Library Services  
Florida Gulf Coast University

Handwritten signature of Jim Morris in blue ink.

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Jim Morris  
Chair, CCLA Advisory Board and  
Executive Director, Library and Community  
Services  
Florida Gateway College

KM/JM:bf  
Attachment

Task Force on the Future of Academic Libraries in Florida  
Status Report October 1, 2010

Actions: June through September, 2010

Chancellors Brogan and Holcombe described their vision for a joint strategic planning endeavor related to the future of academic libraries in Florida during a June 14 conference call with library directors and chief academic officers from the SUS and FCS. Within two weeks, a task force was appointed and website established.

The Task Force on the Future of Academic Libraries in Florida is composed of individuals with diverse backgrounds and perspectives (see Appendix 1 for a list of members). The web page is being used to make information for and about the Task Force readily available to anyone ([www.flbog.org/about/librarytaskforce](http://www.flbog.org/about/librarytaskforce)). Three advisory groups to the Task Force have been established to address the special concerns of research libraries, joint use libraries, and medical and law libraries.

As an initial, information gathering step SUS and FCS stakeholders were surveyed from July 6 until July 13. The survey collected input from Task Force members, library directors, distance learning professionals, chief academic officers & provosts, and from chief information officers. Survey results have been posted on the Task Force web site and an executive summary is appended to this report (Appendix 2).

The initial meeting of the Task Force was held July 19, 2010 at the University of Florida. During the morning session the charge was delivered by Chancellor Brogan and members participated in a facilitated panel discussion on the future of academic libraries featuring Dr. Daniel Greenstein, Vice Provost for Academic Planning, Programs and Coordination, University of California System, and Dr. David Shulenburg, Vice President for Academic Affairs, Association of Public and Land-Grant Universities.

During a working lunch, participants were briefed on the Florida Center for Library Automation and College Center for Library Automation, as well as on recent legislative action pertaining to academic libraries. During the afternoon session members of the Task Force and its Advisory Groups engaged in facilitated discussion regarding environmental trends, assumptions about the future, desired results of the planning effort, and the opportunities and challenges presented by the Task Force charge. The co-chairs agreed to use the kick-off meeting discussions and reading materials to draft a vision statement and an outline of the subject matter to be addressed in the strategic plan.

The work has progressed by email correspondence. Drafts are shared with Task Force and Advisory group members for comment and revision; subsequent drafts incorporate members' input. Appendix 3 describes the timeline and process for completing the project. The current iterations of the documents are appended to this report as Appendices 4 and 5, respectively.

## **Appendix 1 Task Force Members**

Winifred Bradley  
District Department Head  
Edward M. Chadbourne Library  
Pensacola Junior College

Dr. Henri Sue Bynum  
Council for Instructional Affairs, Chair for 2010-11  
Vice President of Academic Affairs  
Indian River State College

Jim Corey, Ex Officio  
Director  
The Florida Center for Library Automation

Katrina Figgett  
Library Media Program Specialist  
Department of Education

Dr. Joe Glover  
Council for Academic Vice Presidents (CAVP)  
Provost and Senior Vice President for Academic Affairs  
University of Florida

Doug Guiler  
Chair of the CIO Group for 2009-2010 (Colleges)  
Chief Information Officer  
Lake Sumter Community College

Dr. Shirley Hallblade  
Dean of the Library  
University of North Florida

Dick Hamann  
Vice President, Information Technology and Resources  
Chief Information Officer, Computing and Telecommunication Services  
Seminole State College

Sol Hirsch  
Library Director  
Alachua County Library District

Dr. Richard Madaus, Ex Officio  
Chief Executive Officer  
College Center for Library Automation

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Jonathan Miller  
Olin Library Director  
Rollins College

Dr. Kathleen Miller, Co-Chair  
Dean of Library Services  
Florida Gulf Coast University

Jim Morris, Co-Chair\*\*  
Executive Director Library & Community Services  
Florida Gateway College

Michael Pearce  
System Vice President, Information Technology  
University of South Florida

Judi Ring  
State Librarian

Deborah Robinson  
Director of Libraries  
St. Petersburg College

Dr. Lauren Sapp  
Director of Libraries  
Florida A&M University

Cecelia L. Solomon  
President, Florida Association for Media in Education (FAME)

Dr. Min Yao  
Vice President & Chief Information Officer  
Florida International University

**Appendix 2 Stakeholder Survey Executive Summary**

The survey was available to stakeholders from the SUS and FCS for one week (July 6-13, 2010). The stakeholder groups were Task Force Members (n=15), Library Directors (n=23), Distance Learning professionals (n=6), Chief Academic Officers & Provosts (n=14), and Chief Information Officers (n=14). A total of seventy-two responses were received. A high level overview of themes for each item, as reported by different stakeholder groups, is presented below. Please note that not all items were answered by all stakeholder groups.

|   |  |
|---|--|
| 1) What are (up to) the three most important issues that a state level planning effort should consider for higher education library services for the next ten years?  |  |
| <p><b>Provosts &amp; Chief Academic Officers:</b><br/>                 Transparent process; Increased collaboration/cooperation; eResources: funding and access; Continued statewide purchasing power and mutual funding; Stable and adequate funding; Flexible, robust library systems; Equity of Resources; Open source systems; Well paid, qualified staff</p>   | <p><b>Task Force Members:</b><br/>                 Digital collections and associated funding; Mobile device usage; Structure of what collaboration will look like; Impact of increased collaboration; Needs of different types of schools and libraries; Stable and adequate funding; Accountability and assessment of higher ed.; Ease of use for patrons; "Just in time" learning</p> |
| <p><b>Distance Learning:</b><br/>                 Mobile devices/learning; Digital/web-based resources; Stable and adequate funding for such resources; Statewide cooperation; Flexible systems; Legislative understanding of the different needs across the three systems.</p>   | <p><b>Library Directors:</b><br/>                 Increased and more effective sharing of resources; Stable and adequate funding for this in general; Investigating open source solutions; Understanding the differing needs of different types of schools and libraries; Doing more with less; Well trained staff; Print-on-demand publishing; eBooks/eResources</p>                    |
| 2) What are (up to) the three most important potential pitfalls that a state level planning effort should consider for higher education library services for the next ten years?  |  |
| <p><b>Provosts &amp; Chief Academic Officers:</b><br/>                 Lack of stable, adequate funding; Mixing institutions with differing needs without an adequate understanding of those needs; Failure to understand the risks and complexity of consolidation; Accountability of the automation centers; Incremental/non-strategic planning; Vendor product inadequacies; Inadequate privacy and security</p> | <p><b>Task Force Members:</b><br/>                 Unrealistic/incremental/non-strategic planning; Fears of failure and collaboration; Trying to do too much; Mixing institutions with differing needs without an adequate understanding of those needs; Lack of stable, adequate funding; Unfunded mandates; Poor collection development</p>  |
| <p><b>Distance Learning:</b><br/>                 Not planning for growth; Not planning for increased bandwidth needs; Lack of stable, adequate funding; Vendor product inadequacies; Not considering open source; Not utilizing all available resources; Increased responsibilities with less money</p>  | <p><b>Library Directors:</b><br/>                 Not having equity of resources across the three systems; Mixing institutions with differing needs without an adequate understanding of those needs; Lack of stable, adequate funding; Digital divide; Clinging to status quo; Vendor product inadequacies</p>  |

|  |  |
|--|--|
| 3) What are (up to) the five most important technology trends that a state level planning effort should consider for higher education library services for the next ten years?   |  |
| <b>Chief Information Officers :</b><br>Cloud computing; Digital media; Open source; Mobile devices; Data mining; Digital rights management; Internet everything; Virtual libraries; Technologically competent staff; Libraries as learning spaces, not full of physical items  | <b>Task Force Members:</b><br>Cloud computing; Mobile devices; Open source; Support for distance learners; Discovery systems   |
| <b>Distance Learning:</b><br>Web based/digital learning, Digitization; Anytime access; Standardization; Mobile devices; Web 2.0; ADA compliance; Assisting students (digital divide); Technologically competent staff  | <b>Library Directors:</b><br>Mobile devices; Anytime Access; eResources; Digitization; Cloud computing; Open source; Broadband access; Distance/online learning; On-demand publishing; Virtual services; New operating systems   |
| 4) What are (up to) the five most important potential technology pitfalls that a state level planning effort should consider for higher education library services for the next ten years?   |  |
| <b>Chief Information Officers:</b><br>Inadequate bandwidth access; Non-validation of open source and cloud computing; Not knowing the next trend; Cyber security; Not incorporating technology decisions into the greater academic decision making process; Digital divide; Lack of stable and adequate funding; Clinging to status quo; Not understanding "Just in Time" learning | <b>Task Force Members:</b><br>Not evolving fast enough; Failure to take tech trends seriously; Incompatibility between library systems; Standards issues; Content management systems that become too complex; Limitations of legacy library systems; Inequitable access to resources; Cyber security; Trends in intellectual property laws/licensing/copyright issues; Lack of pro-education agenda in state government; Downsides of perpetual beta   |
| <b>Distance Learning:</b><br>Not planning for growth; Not understanding the complexity and cost of merging three systems; Lack of interoperability; Limited bandwidth; Digital divide  | <b>Library Directors:</b><br>Trends in intellectual property laws/licensing/copyright issues; Lack of interoperability in a statewide system; Not enough staff, resulting in negative impacts on student information literacy; Early adopting too much: rushing into untested technology; Inequitable access to resources; Inadequate bandwidth/broadband access; Being risk averse, inflexible, and uncreative; Security and privacy issues; Automation: limitations of current systems; Negative impact of data-center consolidation |

**Appendix 3 Task Force process**

|                  |  |
|------------------|--|
| <b>Phase I</b>   | <b>Planning to Plan</b>  |
| June 14, 2010    | Chancellors' conference call with Library Directors and Chief Academic Officers & Provosts from the SUS and FCS  |
| July 1           | Web site established <a href="http://www.flbog.org/about/librarytaskforce">http://www.flbog.org/about/librarytaskforce</a>   |
| July 2           | Task Force appointment letters   |
| July 1           | Advisory Groups created for Research libraries, Joint use libraries, Medical & law libraries   |
| <b>Phase II</b>  | <b>Information gathering</b>   |
| July 6 - 13      | Stakeholder Survey   |
| July 19          | Expert panel presentations on the Future of Academic Libraries<br>Facilitated Task Force discussion  |
| July - ongoing   | Background readings posted to the web site   |
| <b>Phase III</b> | <b>Organizing the work</b>   |
| July 19 – Aug. 6 | Based on the information gathered in Phase II, Co-chairs write 1) draft vision statements and 2) draft outline of topics/questions to be addressed by the Task Force                         |
| Aug. 6           | Draft #1 sent to Task Force members and Advisory Group members for feedback and revision.<br>Task Force members asked to identify areas in which they wish to focus their individual efforts |
| Aug. 20          | Feedback due on Draft #1   |
| Sept. 8          | Draft # 2 written by co-chairs and sent to Task Force members and Advisory Group members requesting feedback by September 15   |
| Sept. 15         | Feedback due on Draft #2.  |
| Sept. 20         | Co-chairs complete report to the Chancellors (including a Table of Contents, work group/writing assignments, and timeline) and send it out to Task Force for final review.                   |
| Sept. 25         | Final feedback due by Sept. 25   |
| <b>Sept. 30</b>  | <b>October 1 report due to Chancellors.</b>  |
| <b>Phase IV</b>  | <b>Creating the Plan</b>   |
| Oct. 18          | 1st drafts due for Section 1 Environmental Scan: Background  |
| Nov. 1           | Co-chairs send out complete draft of Section 1 for review by TF and AGs  |
| Nov. 15          | Feedback due on 1 <sup>st</sup> Draft of Section 1   |

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|                     |   |
|---------------------|---|
| Dec. 6              | Co-chairs send out 2 <sup>nd</sup> draft of Section 1   |
| <b>Dec. 13</b>      | <b>January 1 report due</b> to Chancellors including work plan, timeline, and recommendation regarding FCLA and CCLA data consolidation |
| Jan. – Dec. '11     | Section 2 Strategic Plan will be developed  |
| <b>Jan. 1, 2012</b> | <b>Final report and strategic plan due</b>  |

## **Appendix 4 Draft Vision and Mission statements**

### **Vision**

Florida's academic libraries collaborate to develop new models for scholarly communication and create innovative approaches for connecting our users to the world's knowledge.

### **Mission**

Students and faculty throughout Florida's post-secondary education system will have access to state-of-the-art libraries that support their learning, teaching, and research needs and empower Florida residents to compete and succeed in a 21st century knowledge-based economy.

To accomplish this mission, the libraries will:

- provide access to content including print collections, archival materials, data sets, licensed e-resources and open access publications,
- attract and retain qualified and innovative library faculty and staff who will facilitate access through the design and delivery of services including discovery tools, instruction, and research assistance,
- maintain the technological infrastructure needed to deliver high-quality and innovative library services, and
- model efficiency and effectiveness in the acquisition of resources and deployment of services, leveraging those assets through formal and informal cooperative agreements and collaborative action.

## **Appendix 5 Draft Task Force Report**

Charge: Determine a vision and develop a strategic plan for the future of academic library access, resources and service in Florida that encompasses emerging trends and changing realities in the areas of instruction, research, technology and public services within the context of the academic mission. The plan needs to assess ramifications of the identified trends and realities on currently utilized tools and organizations and the impact on our students, faculty and academic community

### **Section I**

#### **Environmental Scan: Background**

##### **1. Academic Libraries in Florida**

- a) State Universities
  - i) Library descriptions, governance, collaborations & partnerships, library management systems, resource sharing systems, etc.
  - ii) Number and type of doctorate and masters programs; number of degrees awarded; research \$; number of patents and other metrics for research output.
- b) Florida Colleges
  - i) Library descriptions, governance, collaborations & partnerships, library management systems, resource sharing systems, etc.
  - ii) Number and type of associate and baccalaureate degrees and vocational certifications.
- c) ICUF institutions
  - i) Library descriptions, governance, collaborations & partnerships, library management systems, resource sharing systems. Each ICUF library has its own set of information technology solutions. There is no ICUF union catalog.
  - ii) The Independent Colleges & Universities of Florida (ICUF) is a diverse association of 28 private, not-for-profit, educational institutions all based in Florida and accredited by the Southern Association of Colleges & Schools (SACS) serving more than 120,000 students at over 180 sites around Florida. See <http://www.icuf.org>

##### **2. Trends**

- a) Societal
  - i) Copyright
  - ii) Economy
  - iii) Mobile
  - iv) E-everything
  - v) Student expectations
  - vi) Education
- b) Technological
  - i) Growth of mobile devices / applications (everything iPhone)
  - ii) e-books and e-book readers
  - iii) Cloud computing (Amazon, ???)

- iv) Web-scale discovery (Google, Bing, )
  - v) Social networking (Facebook, MySpace)
  - vi) Open Source (Apache, Unix, Drupal)
- c) Higher Education
- i) Instruction
    - (1) Students working in groups
    - (2) Integration of library resources and instruction into course management systems
    - (3) Distance learning
    - (4) Authentication and security for copyright compliance (course reserves, use of academic media such as streaming video, etc.)
    - (5) Integration of multimedia into course management systems
    - (6) e-textbooks
  - ii) Research
    - (1) Open Access and Public Access publishing: in the traditional scholarly communication model, universities create knowledge, which is published by the commercial sector, and then leased back to universities
      - (a) Institutional repositories -- Is self publishing and archiving faculty research more cost effective than the traditional model?
      - (b) Faculty rewards/promotions are still tied to the traditional scholarly publication model; will that/can that evolve?
      - (c) Does Florida want to expand its open access publishing activity? (Orange Grove) Is it cost effective?
    - (2) Creation of virtual research environments (e.g. VIVO project and Internet 2)
    - (3) How are medical schools [and law schools] going to have access to research materials, and how will it be paid for?
    - (4) How can all faculty expect to access research materials, and will new digital tools be available to facilitate the navigation of vast databases?
    - (5) How will libraries interface with various digital repositories of research materials, such as Arkiv?

### **3. Trends in Academic Libraries**

- a) Collections/Content
  - i) Shift from print to electronic
  - ii) Shift from copyright to licensing and ownership to access, which places ownership in the commercial sector
  - iii) Web scale discovery tools
  - iv) Preservation and digitization of unique collections and historically significant collections
  - v) Shift from print resource management to electronic resource management
  - vi) work developing value added collections to meet emerging needs (global warming, mathematical modeling, peak oil, sustainable energy)
  - vii) The importance of quality metadata as collections shift in format

- viii) Archiving beyond just digital collections
- b) Public Services
  - i) Increased customer expectations for easy, broad access to digital content. (Amazon)
  - ii) customized patron-driven acquisitions programs
  - iii) reference services via text messaging and
  - iv) mobile interfaces to digital collections
  - v) online tutorials and user-friendly interfaces
  - vi) adding academic support services (writing, tutoring, and media centers) to the library facility
  - vii) The librarian as instructor for students and collaborator with faculty
  - viii) Information literacy

Reference the ACRL 10 trends - <http://crln.acrl.org/content/71/6/286.short>

- c) Technology
  - i) Web-scale discovery (Serials Solutions, EBSCO Discovery, PrimoCentral)
  - ii) Cloud computing (Ex Libris URM, OCLC Webscale ILS, Duracloud, FCLA and CCLA)
  - iii) Open Source Library Management Systems (Evergreen, Koha, OLE)
    - (1) What is the next generation library management system? The Open Library Environment (OLE) Project is developing a design document to inform open source library system development efforts, to guide future library system implementations, and to influence current Integrated Library System vendor products.  
<http://oleproject.org>
  - iv) Open Source Digital Collections Systems (Fedora, Dspace)

#### **4. Cross-institutional library activities and issues**

- a) Joint Use facilities
  - i) List of joint use facilities that involve at least one publicly funded college or university
  - ii) Proposed project of the Collaborative Ventures Steering Committee (CVSC) to develop a joint use online library catalog for the combined Florida Atlantic University (FAU) and Broward College facility in Davie. This project is a prototype that will explore cross-loading of data between CCLA and FCLA. (The CVSC is composed of the Directors of FCLA and CCLA, and the past, current and incoming chairs of their advisory groups.)
  - iii) ICUF institutions partnered with publicly funded local institutions.
- b) Library management systems
  - i) All 39 publicly supported institutions of higher education migrated to the Ex Libris' Aleph 500 Library Management Software, Version 19, as of August 1, 2009
  - ii) Development of an online discovery tool with search capacity across combined FCLA and CCLA library holdings and applicable electronic resources, to include K-12 and public libraries where feasible, with an implementation date of September 1, 2010.
  - iii) Development of a transition plan, by October 1, 2010, to consolidate FCLA and CCLA computing services and associated resources at the NRDC by December 31, 2011
  - iii) Costs, opportunities for efficiencies, operational implications, service implications, other issues?

- c) E-resource licensing
  - i) Using federal funds, the State Library licenses e-resources for everyone in Florida and sets the foundation for Florida's libraries of all types
  - ii) Through FCLA and with its appropriation, the SUS libraries collaborate on licensing e-resources.
  - iii) Through CCLA and with its appropriation, the College libraries collaborate on licensing e-resources.
  - iv) Cooperative eResource Licensing in Florida: Joint Report of FCLA, CCLA and ICUF
  - v) Development of a method for SUS and FCS institutions to collaborate with school districts and public libraries in the identification and acquisition of electronic library resources
  - vi) Provide access for accelerated high school students (AP, IB, AICE, etc.) to electronic library resources licensed by FCLA and CCLA, pursuant to a user-authentication process to be developed by DOE/FCS and BOG/SUS
- d) Statewide e-collections
  - i) Digital Archive of Florida
  - ii) Orange Grove Digital Repository
  - iii) Florida Electronic Library
    - (1) Florida on Florida
  - iv) Florida Voices (audio)
  - v) Archives Florida (finding aids)
  - vi) SUS Library digital collections (PALMM, UFDC, ???)
  - vii) Other Collections
- e) Statewide digital preservation archives
  - i) Florida Digital Archive (at FCLA)

## **Section II**

### Draft Strategic Plan

#### **1. Vision**

#### **2. Goals**

This section will be composed of goal statements that describe the outcomes that must be achieved to realize the vision. We anticipate that there will be no fewer than 5 and no more than 10 goal statements.

Each Goal Statement will be developed by:

- Identifying specific actions required to achieve the goals,
- Describing the relevant costs and opportunities for efficiencies, and
- Defining quality indicators or measures.

#### **3. For Further Research**

- a) Unresolved questions due, for example, to lack of data or lack of consensus among Task Force members