LIBRARY RESPONSE TO

THE FINAL REPORT OF THE PROGRAM PERFORMANCE REVIEW COMMITTEE

I.   **INTRODUCTION**

The CSU Fullerton Pollak Library (the library) prepared the Program Performance Review (PPR) Self Study and its appendices between early December 2021 and early April 2022. A draft of the PPR Self Study was circulated to the library faculty and staff (the employees) for comment in February and March and adjustments made to the document to reflect the input received. The Dean of the library, Emily Bonney, sent the completed Self Study with its appendices to the External Review Team (Review Team) comprising Dr. Sheryl Fontaine, Dean of Humanities and Social Sciences at CSUF, Dr. Theresa Byrd, Dean of the Library at the University of San Diego, and Mark Stover, Dean of the Library at CSU Northridge, on 8 April 2022. The Review Team made the site visit on 27 May 2022 and met with the following individuals and groups as per their request: Library Dean; Associate Deans and other library managers; department heads; representative staff (all who are able to attend); representative faculty (all who are able to attend); at least one dean from the Dean's Council (Bey-Ling Sha, Dean of the College of Communications); two student assistants who work in the Library; AVP for Faculty Affairs (Dr. Ed Fink); Chair of the Academic Senate Library Committee (Dr. Sinan Akciz, Assistant Professor of Geology). Turnout by both faculty and staff was robust and lengthened the conversations. Because the interviews exceeded the scheduled time the Review Team members did not have sufficient time to tour the library building, which may have affected some of their conclusions. Dean Stover sent the Review Team's Final Report (the Report) to Dean Bonney on 22 August 2022. On 23 August 2022 the dean shared the document with the employees who were invited to send comments to the dean via email or to use a Google form prepared by the Associate Dean Mike DeMars with a 10 October 2022 deadline for receipt of feedback.

According to the protocol for the PPR of an academic program, the chair writes a response to the reviewing committee's report, the Dean responds to that, and the chair in turn provides a response to the Dean's comments and recommendations. These documents are then forwarded to the Provost. Since the library is one department, the Senior Associate Vice President for Institutional Effectiveness and Planning recommended that the Dean write the only response to the Report. The document that follows is organized according to the sections of the Report itself and has incorporated the feedback received from the employees.

Generally we are pleased that the Review Team recognized the challenges that the library has confronted in the last decade and the persistence and competence of its

faculty and staff. Throughout the report the Review Team commends the library employees for their adaptability, hard work and commitment to the institution. The Review Team also emphasized that in large part the difficulties that confront the library result from years of underfunding and understaffing. The text below addresses the response of the faculty and staff to the Review Team's evaluation and recommendations.

PART ONE: SERVICES

OneSearch

Employees agreed with the Review Team's recommendation that the useful information about OneSearch already on the website should be more prominently emphasized. There appeared to be no disagreement that the Alma workflow and CFS need to be integrated to eliminate the duplicative workflow, as this has been an issue since the migration to Alma.

Access Services

The Review Team commended Access Services for the quality of the staff and the variety of ways in which the fundamental purposes of the unit, such as checking in and checking out books and other materials, and managing reserves, have been handled particularly throughout the recent challenges of the pandemic. Access Services personnel were among the first library employees to return to campus, resuming their work on site in mid-July 2020. The Review Team opined, however, that the unit needed more support from administration, the addition of staff to expand services at night, and that a librarian should be supervising the unit. The Access Services employees view these recommendations as unnecessary. The Review Team likely did not know that the Associate Dean for Public Services manages this unit and supervises the head of Access Services and their reports. In addition, the library will apply to reclassify the position of head of Access Services to an analyst/exempt level to allow for greater flexibility particularly in scheduling. The employee responses did include an interesting suggestion that there should be a matrix or list of some kind that identifies who is responsible for the different duties in Access Services. Employees also viewed as unnecessary the Review Team's recommendation that there be an additional staff member in the evening, as they believe the current arrangement that includes a CSS/CSO in the evening is sufficient. At present there appears no reason to follow the Review Team's recommendations on Access Services.

Reference and research services.

Library employees expressed dismay with the Review Team's assessment of the library's provision of reference and research services. It appears to the employees that the Review Team did not fully understand how the library employees provide these services. The text of the Report suggests in the first instance may have concluded that *The Reference Task Force Report* (*Report*) prepared by CSUF librarians in 2019 describes actual library practice. The *Report* was a study of current best practices in the provision of reference and research services and possible changes the library might want to make. The library has followed only some of those recommendations. But fundamental differences in the philosophical approach of the Review Team on the one hand and the librarians on the other also emerged.

> *   The Review Team, the *Report,* and the employees agreed that current reference demands merit a hybrid model with a librarian paired with a staff or part-time librarian. Lack of funding to hire reference faculty meant abandonment of the two-person model which remains the preferred approach. While per the Review Team there had been a decline in reference transactions prior to 2019 those numbers have improved, and the demand for online services has skyrocketed since 2020. Librarians also have conducted in-service training although the Review Team apparently did not know that.

> *   The Review Team stated that all reference librarians should work the same amount of time at the desk, be responsible for finding substitutes as needed, and not expect the head of reference to deal with facility and security issues. The librarians rejected the equal hours proposal because availability can shift from week to week depending on the demands of the instruction schedule. They were puzzled by the admonishment to find their own substitutes as that is how work is managed in the library at present with the use of an improved scheduling system. Still equity remains an issue. Library administration have clarified that facility and security issues should go directly to library administration or to the building security coordinator.

> *   The Review Team questioned the value of moving the reference collection into the stacks and urged librarians to undertake vigorous weeding of these materials. Librarians already have weeded the collection, retained a very small number at the desk for easy reference, and consigned only a small number to the stacks. That said, statistics show that the shelved reference materials received almost no use.

> *   Assessment, which the Review Team thought needed work, has improved since 2019 using surveys both in-person and online but the surveys are sent only

to those who request services through the online system.   Standardization of assessment depends on librarians sending the surveys to patrons scheduled outside the online system.

*   Employees generally, but not unanimously, supported the Review Team's recommendation that reference services be available on Sunday. In 2021 the library had been open on Saturday, but in 2022 has been open both days of the weekend and will add reference on Sundays. Comparison with other CSU libraries in 2021 is problematic because libraries on many CSU campuses were open for quite limited hours in 2021/2022.

*   The Review Team questioned the wisdom of including students in the staffing of the reference desk. While this was a recommendation of the *Report* the employees note that the CSUF library provides opportunities for students in MLIS programs, particularly those at San Jose State University, who clearly differ from the undergraduate students who otherwise make up the bulk of the CSUF library student assistant workforce supporting other library services. They also note that in a 2021 survey 12 of the 19 CSU libraries who responded include students at the desk to answer non-research questions.

*   Librarians agreed with the Review Team's recommendation that the subject liaisons be used to extend service to students and that those serving as liaisons be true experts in their assigned fields. There was agreement that the library needs more subject librarians so that they can more readily engage with the instructional faculty in the colleges. The reality is that the majority of librarians enter the profession with undergraduate education in the humanities and social sciences so that matching subject matter librarians to faculty in other disciplines remains a challenge. The increase in referrals indicates that this is an opportunity area. Closing that gap would require more funding.

In the end, except for the instances mentioned above, the librarians concurred with the Review Team's recommendations. There should be more marketing, and this year the library will recruit someone to support marketing efforts to help the campus know better what the library has to offer so the burden is not entirely on the faculty. While everyone generally agrees that subject matter librarians should be so assigned because they have requisite expertise, the reality, as noted above, is that most librarians have backgrounds in the humanities and social sciences so it can be difficult to find librarians to fill particular subject matter holes. Formalization of the position of head of reference and the ability to relieve that individual of some teaching and reference obligations would elevate the role, and the library will explore the possibilities for doing this.

INSTRUCTION

The Review Team was less critical of the library's instruction practices. They concluded their summary of the range of instruction by observing that the ACRL statistics showed that the CSUF library "had the largest number of attendees for instruction presentations in the CSU." The future will include the expansion of instruction to include online and hybrid modalities. The Review Team could not determine how the library was going to approach this shift and the extent to which they would adopt online options and whether those would be synchronous or asynchronous. They also called for some accountability in terms of achieving a fair distribution of the number of sessions while at the same time they recognized that no one likes targets. Librarians had produced a study in 2019, the *Instruction White Paper* that promoted "a formalized name, mission, vision, and [the creation of] scaffolded outcomes that differentiate learning from the first year to graduate level. . ." The difficulty, librarians had concluded, was staffing such a scaffolded curriculum. While recognizing that inadequate funding and consequently short staffing were the root of the problem, the Review Team argued budget problems should not be solved by a PALS program in which students did some of the instruction. This argument exposed both a misunderstanding of the PALS program and a fundamental philosophical difference between the reviewing librarians and the cadre of librarians who had applied for and received a grant to fund the PALS program. The PALS program was grounded in recent research that demonstrated the value of peer-to-peer instruction. As a promoter of the Supplemental Instruction Model, CSUF has long recognized the merit of this modality. The program, in any event, was only a one-year undertaking and not a persistent approach to addressing a staffing and budget issue.

The Review Team commended the CSUF librarians for their quick shift to online in the spring of 2020 and for their ability to teach more information literacy classes than they actually have librarians to handle. Still the librarians disagreed with some of the recommendations. Since the PALS program is over, the recommendation on that is moot. Highlighting that the Guides on the webpage are Springshare LibGuides is unnecessary because the term "Guides' has a clear meaning. Librarians attempted workshops in the past and attendance was poor so they will not revive their use and need not worry about differentiating them from the noontime talks. Peer review no longer relies on the form but is accomplished through teaching triangles. The recommendations on developing learning outcomes for the instruction program, and for the Associate Dean to meet with liaisons to address online learning, remain under consideration. Finally, formalization and elevation of the role of the Coordinator of Instruction depends on funding - just like everything else.

OTHER SERVICES

The Review Team's discussion of "Other Services" was primarily descriptive and covered the UA&SC, the Library's participation in the Affordable Learning Solution program, partnership with the Office of Research and Sponsored Projects, the Faculty Noontime Talks, the Exhibits Program, the library's presence on social media, the copyright and repository services, and the IT outposts that serve students, particularly the Genius Corner. Review Team commented favorably on all of these. The employees in those units would have appreciated more comments from the Review Team and were uncertain how to interpret the relatively limited treatment of their work. It is possible that as there were no analyses of these units comparable to the internal analyses of instruction and reference, the Review Team simply had less to which to respond.

 In general, the providers of the other services would have liked a bit more attention, in particular the UA&SC which, in addition to being a repository for some exceptional collections, also provides active instruction sessions on working with primary source materials in collaboration with instructional faculty from several departments. The recommendations on this section focused on increasing awareness of the opportunities the library provides in this area. In particular the Review Team recommended shining a brighter light on the library's role in OER and enhancing the website. The Review Team may not have appreciated or understood that the library's engagement in OER is, at the moment, not a program but the work of a single librarian. The Review Team also made the important observation from people outside the library that they were not familiar with the many services the library provides. The library needs to tell its story. As noted previously, heightening campus awareness about the library's offerings will require recruiting a marketing specialist, a project that already is underway.

COLLECTIONS

In this section the Review Team appears to have concluded that Pollak Library has tilted predominantly in favor of ebooks. This is not entirely true, as the library continues to acquire materials available only in print. The emphasis on ebooks is an access issue. In any event Pollak Library already has the hybrid model that the Review Team recommends. The second recommendation of creating a collection development program is something that the associate dean for the unit had concluded, based on current literature and research, was not appropriate. On the other hand, the unit would like to do a diversity assessment and such an undertaking might be possible with funding for a position in that area. On the questions raised about faculty ordering books - they can contact the collections librarian or the department liaison. Each liaison has a

budget for purchasing books. Finally, as to the recommendation to use Green Glass, an OCLC collection analytics tool, CSUF already has conducted such an analysis of the book collection in 2019 and piloted the use of GreenGlass to do a serials analysis in 2020. CSUF has been an active proponent of shared print projects in which GreenGlass is a critical component. One comment the Review Team made was, perhaps, misunderstood by the employees. The Review Team stated that if faculty cannot acquire a publication, they lose confidence in the library. This was only a hypothetical and not a description of actual user experiences at CSUF. Participation in OneSearch and the ULMS means that faculty disappointment is rare as even print materials usually can be obtained within 24 hours. That said, the library faces the challenges that confront all CSU libraries in providing faculty and students with access to electronic material accessible only through subscriptions and the licensing limitations of some ebooks. The ethnic studies requirement will create increased demands for archival materials available only online. Unless and until controlled digital lending allows libraries to share electronic material these expenses, which increase every year, will continue to strain the library's limited acquisitions budget.

STAFFING
Faculty and staff welcomed the recommendations of the Review Team on staffing. library administration will prepare an organization chart that reflects the current arrangement but that also sets out the long-term needs for faculty and staff. This aspirational organization chart will expose the deficits to which the reviewing team refers in the report. As to clarifying the role of the 26 entities who share library space, the library will work this year with all parties to define clearly the way in which each of the partners in the building contributes to the achievement of the library mission. This seems essential to dispel the sense that these various units are just tenants and not real partners working with the library. Achieving this goal likely will require some formal agreement such as the MOU but also informal methods such as uniform signage and the understanding that the library dean is the steward of the building and in the end responsible for managing the space. As for the divide between faculty and staff, this appears to be in part a consequence of the split of obligations during the pandemic. Whereas staff returned to the building in mid-July of 2020, faculty did not return with a few exceptions until July and August 2021. The hope is that the continued participation in the group All Library Employees (ALE) will help to heal the rift particularly since ALE was created expressly to bring together faculty and staff into a single organization that shared ideas and planned activities. The administration will continue to look for ways to address these very real issues. At the library retreat in August 2022 participants expressed a strong desire for more opportunities to socialize with each other. A Halloween event with decorated bookcarts and pizza brought everyone together on 26 October, and a pilot Tea with the Dean in early November will also furnish another

opportunity. The dean will continue to host monthly events with beverages and snacks, and the social committee is organizing a holiday event for December. Finally, the library will revive the very popular "What's Brewing at the Library?" event that brings together library employees and college faculty. A January retreat will focus on team building rather than just more talk with faculty and staff developing the program themselves. Units will work separately in the morning and will come together to share in the afternoon.. Part of the issues that are related to the rift may also be part of a broader sense of malaise because everyone is working too hard. The 23 faculty and 30 staff, no matter how hard they work, are not enough to address the requirements of a large academic library on a campus this size and aspiring to R2 status. The Review Team was quite clear on this issue.

FACILITIES

Library employees also welcomed the strong recommendations of the Review Team on the library's facilities. The library administration and the team of fund-raisers will continue to work on securing the funds necessary to address the most urgent issue, the construction of the University Archives and Special Collections on the 6th floor of the south tower. This project was identified as a priority more than decade ago during the Library of the Future exercises but never received any funding. Recent gifts have provided the library with approximately $3 million in seed money, and collaboration with the University's CalNAGPRA project may reduce the total cost, but more needs to be done. University Advancement should find some way to, at a minimum, provide a partial DOD to assist in the solicitations necessary to achieve this goal. The dean has prioritized addressing the second issue raised by the Review Team, the uneasy juxtaposition of IT activities and library work. It is crucial before the search for the new dean begins that the parties clarify this relationship to emphasize that IT is not an independent entity in the building. Regardless of how IT came to have so prominent a place in the library, the VP of IT and the dean need to agree on the rules and restore library employees' trust in IT as a partner and not a threat. Finally as to the security issue, the library this year has significantly improved relations with the UPD, and a library task force is developing a process for active shooter training and building evacuations.

BUDGET

The Review Team's discussion of the budget confirmed the views of the library employees. The proposal for a multi-year budget is well-taken, and the administration will work on that. The dean also has initiated discussions with the new VP for Admin

and Finance to explore additional or alternative ways of funding library operations as opposed to capital or one-time projects. Without adequate operating funds the library will find it difficult to provide the level of services and resources to which the campus has become accustomed. Likewise, the recommendation for a three- to five-year plan for how to spend philanthropic funds is appropriate. While the construction of the UA&SC space leads the way, smaller gifts or grants would enable the expansion of library supported digital resources that could support student learning. Such gifts could also support the improvement of student accommodations in the building including pop-up study rooms and more varied and comfortable furniture. As noted above the library will address the recommendation for an org chart that addresses current and desired staffing, along with supporting documents that clarify the roles. The administration also will pursue the recommendation on how to support a unit that does not generate FTES given the current model. Finally, the administration in collaboration with the employees and the new marketing director will communicate the library's mission statement to present the library more clearly to the campus and provide a foundation for bringing the 26 partners into alignment with the library's goals. That mission statement, already on the library's website but perhaps not seen by the Review Team asserts an aim "To advance the success of the academic community by providing access to an evolving collection, developing information literacy skills, creating innovative spaces, encouraging intellectual curiosity, and welcoming diverse perspectives." These are ends to which all work in the library should be directed.