

**Library Strategic Planning Task Force**  
**CHARGE**  
**April 2009**

Cornell University must address a \$215 M operating budget deficit on the Ithaca campus. This will require a substantial correction—between 15 and 18 percent of the unrestricted budget, with larger corrections likely among administrative units (see [www.cornell.edu/budget](http://www.cornell.edu/budget) for more on the budget challenge and responses).

Solving this budget challenge will require unprecedented coordination across campus constituencies, and a process that imbues budget reduction and revenue enhancement strategies with credibility. Major decisions will need to be made well before the end of the Fall 2009 semester, so that changes can be implemented beginning in fiscal year 2011.

Given the magnitude of the challenge, and the breadth of the library facilities and services across the Ithaca campus<sup>1</sup>, the Provost has asked the University Librarian to establish a libraries planning task force to make recommendations about current and future library priorities and opportunities for cost savings and revenue enhancements. This task force will consist of representative library staff, faculty, and others chosen from across the schools and colleges. The task force will be staffed by the Executive Assistant to the University Librarian (Ed Weissman) and data gathering and analysis will be provided by the Library's Research and Assessment Unit. The task force will meet regularly with the University Librarian.

The Cornell University Library (CUL) serves a critical academic role in the university, through its collections, facilities, services, and expertise. The budget situation and the dominance of digital processes, content, and services challenge current operating assumptions. The Library must plan for a future in which library facilities are fewer in number and reconceived, and the local collection is smaller, but much more highly specialized and considered in the context of integrated collective partnerships with other leading research libraries. The Library must also redirect resources to meet new demands for data curation, preservation, and reuse; alternative forms of scholarly communication and expression; and informatics and information competency support across disciplines. Strategic planning should recognize the fundamental responsibilities of Cornell University Library:

1. Identifying and making accessible research and teaching materials that support the university's academic priorities

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<sup>1</sup> There are 18 libraries located on the Ithaca/Geneva campuses, including Adelson (Ornithology), Africana, Engineering, Entomology, Fine Arts, Geneva, Hotel, Industrial and Labor Relations, Kroch, Law, Management, Mann, Mathematics, Music, Olin, Physical Sciences, Uris, and Veterinary Medicine plus the Annex.

2. Ensuring unfettered access to that material over very long time frames
3. Providing physical and virtual services/spaces that most effectively facilitate teaching, research, and learning, that support cross-disciplinary research, and address emerging needs, such as the creation and accessibility of digital visual resources, video, and research datasets.

All aspects of library operations, activities, services, and funding models should be considered. Because the library system is uniformly strong, tough choices will have to be made, and the task force should privilege those aspects that are exemplary, highly efficient, non-duplicative, can not be provided via other means, and whose impact is most broadly felt by faculty and students. Some very good programs and services will have to be let go or minimized in order to reduce costs and redirect resources to more priority work. Throughout, consideration should be given to how planning decisions will be implemented, what difficulties might arise, and what resources and support will be necessary to achieve change. The task force will also need to assess the impact of any change on library users and consider how such changes will impact CUL's standing among and ability to partner with peer research libraries (Ivies Plus, Association of Research Libraries, Borrow Direct, etc.)

It will be critical that the task force structure its work in a way that allows for input from, consultation with, or participation by, relevant constituencies. The College Officers Group will be asked to review recommendations on funding models and facilities. In addition, each school/college is invited to identify faculty, administrators, and students to assist the Task Force and review their initial recommendations. The identification of such review groups will be determined by the respective deans. Most of this involvement will follow the first phase of planning by the task force (that is, beginning in July and running until the final report is submitted). This need for transparency must be balanced against the need to be expeditious, efficient, and to make hard decisions. It is inevitable that some recommendations will be unpopular with some constituencies, but this task force cannot allow a desire to avoid conflict deter it from making bold recommendations. The recommendations of this task force will be considered alongside recommendations from college- and school-based task forces.

The Libraries Task Force should focus on the following:

- **Vision and Mission.** Recognizing inevitable financial, technological, and academic changes over the next five years, is CUL's mission and vision properly aligned? What are the likely challenges and opportunities that will affect the library's mission? Do current activities and investments prepare the library to meet these challenges and opportunities? Are there measures in place to assess their impact and effectiveness?

- **Organizational structure.** Does the library system have an optimal structure? Are there programs, departments, or unit libraries that could be reconceived or consolidated to create efficiencies, enhance strengths, return significant savings, or address unmet needs? How would such changes affect library constituents or academic requirements, such as accreditation?
- **Funding and budget models.** The endowed-side libraries are supported directly from central university funds. Mann, ILR, Vet, and Hotel libraries are supported directly by CALS/ CHE, ILR, Veterinary Medicine, and the Hotel School respectively. The costs of operating Law and Management, although funded through the endowed budget, are re-billed to their respective college. In addition, each of these seven schools receives a CAM charge for central library services. The task force should consider the following: What does each funding entity support and receive for its investment? Is there a different budget model that would be more effective and allocate costs appropriately? In order to evaluate this, the task force should create a standard template of library indicators to secure comparable data across unit libraries.
- **Priorities for each college/school.** What are the top three services, collections, and programs needed by each school/college? Are these adequately supported, under-served, or currently not offered? For instance, there is a deep need to support the creation and use of digital visual resources, especially in the humanities and life sciences. The Business School would like to offer database access to its alumni. What other needs are currently unmet?
- **Opportunities for collaboration within Cornell.** What new challenges facing the university can best be met through a collective effort involving the library and other units on campus? What are the strategic areas that need strengthening through partnerships and distributed responsibility? Are the current collaborations addressing issues effectively and efficiently? What redundancies and gaps currently exist?
- **Opportunities for collaboration with other leading university libraries.** What are the possibilities that can be realized through collaborations with other university libraries, including the proposed deep integration with Columbia University Library? What areas in particular lend themselves to collective work? What concerns and expectations are there among faculty, students, and staff about such arrangements?

**Timeline:**

April – Charge drafted and task force formed

June – Initial ideas (strategic and opportunistic)

June and July – Research, assessment, consultation

August – Drafts of brief structural change documents reviewed by University Librarian and appropriate constituents

September- Final document submitted to the University Librarian

October – Final report and recommendations submitted to President, Provost, and University’s Strategic Planning Committee