

UBC-Okanagan Library Review

Prepared by:
UBC Okanagan Library External Review Committee

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Introduction

This report was prepared by the External Review Committee, as part of the UBC Library Okanagan Review, following the process outlined in the University's *Terms of Reference for the Review Team*. The purpose of the review is: "To evaluate the operation, management, and service role of the UBC Library with emphasis on its achievement, the scope and balance of its various functions, the effectiveness of its leadership and administration, and the opportunities and challenges it faces in the future."

The scope of the Review included:

1. **Governance and administration:** The reviewers should evaluate the organizational structure of the Library, to determine whether it is appropriate to the Library's needs and best serves the University's interests.
2. **Provision of services:** How well is the Library meeting the needs and expectations of the University community? Are collections and services adequate to support the University's mission with respect to teaching, learning, and research?
3. **Leadership and administration:** How effective is the overall leadership of the University Librarian and the senior management team? In what ways, and to what effect, does the administration consult with Library staff and users? What steps has senior administration taken to strengthen the Library's reputation nationally and internationally?
4. **Infrastructure and Resources:** The reviewers should consider the physical and financial resources of the Library, including its space, teaching facilities, equipment, and financial base. Is the Library adequately resourced to support innovation in learning and research, and to develop collections in support of new academic programs?
5. **Internal and external relationships:** The review should examine the relationship between the various branches of the Library system, including UBC Vancouver, UBC Okanagan, the hospitals, and the "satellite" libraries that are part of the system. The review should also evaluate the working relationship of the Library with academic faculties, departments, institutes, and centres, to determine how effectively the Library is meeting their needs.
6. **Community Engagement:** In what ways, and how effectively, is UBC Library engaging with the broader community in British Columbia and beyond? What role is it playing in lifelong learning locally, nationally, and internationally?
7. **Operations:** The reviewers should consider the daily operations of the Library in terms of efficiency, working conditions, and staff morale. Are the physical spaces occupied by the Library appropriately serviced and maintained? How does the Library implement the University's employment and education equity policies?

8. **Future development:** The review should identify the challenges and opportunities facing the Library, and to make recommendations about possible directions for its future growth and development.

For the convenience of the reader, recommendations have been included in each section, as well as summarized in the Recommendations section at the end of the report.

The Review Committee conducted the on-site visit in Kelowna, February 13-15, 2019 after reviewing a detailed and helpful Self-Study prepared by the University Librarian and her team. Other documents consulted included:

1. University of British Columbia. *Strategic Plan 2018-2028*.
2. University of British Columbia Okanagan Campus. *Aspire: Envisioning Our Future*.

During the three-day visit, the Review Committee met in person and via Skype and telephone with representatives from units across the UBC Okanagan campus, senior administrators in Vancouver, students, and members of the Libraries staff. Please see Appendix 1 for the schedule and list of interviewees.

It was a pleasure to meet with so many engaged and supportive stakeholders of the UBCO Library. The Review Committee is grateful to members of the University community for their outstanding work in preparing for our visit, and for their commitment to the success of the Review process. The Review Committee would like to express our appreciation in particular to Dr. Deborah Buszard, Dr. Ananya Mukherjee-Reed, Dr. Patricia Lasserre, Ms. Sharel Verigin, and Ms. Heather Berringer for the instigation and organization of the Review process, documentation provided, and visit logistics. Any factual errors are entirely the responsibility of the Review Committee.

Overview

Since 2005, UBC Okanagan (UBCO) has doubled and then tripled in size, developing strong programs in alignment with the UBC brand, and building an attractive, student-centered campus. Thirteen years later, unique UBCO Faculties and programs are emerging and the University is dealing with growth issues that speak to its status as a destination campus. The UBCO Library is the heart of the campus, physically and intellectually, and highly valued by the entire University. Extending its reach beyond campus, the Library has been emblematic of the University's mandate to be of service to the community, through outreach and partnerships in Kelowna and the greater mainland community.

The Review Committee was pleased to observe the hallmarks of a well-run library — dedicated librarians and staff, heavily used facilities, appreciative Faculties, well-supported students, and evidence of positive relationships. The Review Committee was informed of initiatives that are consistent with those in other academic and research libraries: Open Educational Resources (OER), chat reference, academic integrity instruction, scholarly communication support, research support, makerspaces etc. The Library is led by a creative and visionary Chief Librarian with an inclusive,

collaborative approach who is highly regarded by the campus community. Her energetic leadership style has helped to move the Library team forward on key initiatives that should contribute to student academic success, excellence in faculty and student research, and which create numerous opportunities for community engagement. Of note is the recent opening of the new Learning Commons, to which the UBCO students contributed \$10 million dollars in capital funding, a testament to the value they place on the Library and its services and spaces.

The Review Committee did not uncover any serious issues; most concerns raised can be linked to rapid and impressive growth in enrolment and the attendant demands placed on an essential academic service such as the Library. The Review Committee is pleased to see a Library that is thriving and evolving with the University and demonstrating value to the broader community.

Recommendations are offered below in the areas outlined in the Review Terms of Reference; these are for consideration as potential avenues to achieve even greater success for the UBCO Library.

1. Governance and administration: The reviewers should evaluate the organizational structure of the Library, to determine whether it is appropriate to the Library's needs and best serves the University's interests.

Of the eight areas considered in accordance with the Terms of Reference, the Review Committee spent the most time considering the governance structure and administration of the Library.

The UBCO Chief Librarian and Associate Provost Learning Services reports to the UBCO Provost. In most large research libraries the University Librarian, Chief Librarian or Dean of Libraries reports to the Provost and Vice President (Academic), although in a few instances they report to the Vice President Research or have other reporting lines. The direct reporting relationship of the Chief Librarian and Associate Provost Learning Services to the UBCO Provost signals the importance of the library as an academic unit, an important partner in the provision of academic services, and ensures that the Library can focus on the unique needs, opportunities and local issues at UBCO.

The current reporting structure and governance for the UBCO Library is a legacy of and to some extent predates the 2005 merger. The reporting relationship between the UBCO Chief Librarian and the UBC University Librarian based in Vancouver was presented to the Review Committee as uncertain. For several people with whom the Committee met, it was not clear whether there is, ever was, or was intended to be a solid or at least well-defined dotted line from the UBC University Librarian to the UBCO Chief Librarian. The absence of a clear relationship has left the UBCO Library dependent on personal goodwill and the natural cooperative and consortial nature of library management. To date, the structure and governance has not inhibited the growth of a high functioning library. The UBCO Library has significant, essential and permanent dependencies on the UBC Library. This inherent reliance relates not only to UBC's extensive library collections and the ensuing technical services, but also to the catalogue, integrated library and discovery systems, data repositories, institutional repositories, technology infrastructure and related services that underpin an increasingly important portion of teaching, learning and research support in libraries. The UBC Library system provides considerable

value without a corresponding cost to UBCO. The financial governance established for the two campuses and “budget firewall” preserve this relationship characterized by “value” and “dependency”.

This lack of an articulated reporting relationship between the UBCO and UBC Libraries, and a similar absence of formalized financial agreements or a merged financial model, in combination with significant dependencies on UBCO’s part for services and collections from the UBC Library system, could lead to frustrations and misunderstandings, in the absence of the bounty of goodwill in existence now. Minor existing tensions between UBCO and the UBC Library system may escalate if UBC Library is not able to provide services to the extent and in the timelines required or desired by UBCO Library. UBCO values nimbleness and is not accustomed to the more stringent processes and extended timelines that are unavoidable in complex systems.

As UBCO continues to grow and offer the complete range of teaching, learning and support services, the reliance on these large systems and infrastructure at the UBC Library system will also increase. Typically, in distributed campus systems, the costs are shared proportionately or based on some allocation mechanism. There are many arguments both in support of and against cost-sharing models and any accompanying service level agreements. However, the governance associated with cost sharing can help to secure a “voice at the table” and can help to manage demand and expectation. Nonetheless, the overall financial governance for the two campuses precludes “cost-sharing” as an immediate solution; it appears that there is no real ability or will to implement a charge-back system even if it were desirable without disrupting the overall culture and university governance. A well-defined governance structure and/or financial allocation model is crucial when formal financial cost-sharing arrangements cannot be put in place.

In order for UBCO Library to maintain agility, be responsive to the unique needs at UBCO, work within the existing “budget firewall” financial model, and avoid incurring the substantial cost of re-creating the library-centric technical and technological infrastructure provided through UBC (Vancouver) Libraries, it is important to consider a reporting and accompanying governance structure that acknowledges the value of these services, and facilitates participation and two-way consultation in needs based planning, partnership, and decision making.

Options for the Reporting Structure

The Review Committee discussed various models for the management structure at multi-campus university libraries, including the University of California (UC) model. The University of California Libraries consist of 10 independent libraries, each at major research institutions as well as the California Digital Library. In many respects, the governance for the UC Libraries mirrors that of the overall system, which has a single President but equivalent Chancellors at each of the independent campuses. Each library has a University Librarian that is equivalent to those in the other institutions. The institutions are independent but work collectively as part of one system as do the libraries. There is significant governance as to how the libraries participate in decision-making; contribute to and cost share all common services; gain access to the realm of centralized services; acquire, accept and process archival and special collections; select shared electronic resources; and make policy decisions that affect the entire system. This model depends on a complex governance model

<https://libraries.universityofcalifornia.edu/about/who-we-are>) that works, in part, because there are so many equivalent partner institutions. The independence, research capabilities, and library breadth and depth of the independent institutions is recognized by the Association of American Universities (AAU) and library organizations, like the Association for Research Libraries (ARL) where many of the institutions are independent members.

This model does not reflect the current state of cooperation and resource sharing in practice between the two UBC campuses (UBC Vancouver and UBCO). There are some similarities in overall governance but not all of the same equivalencies. The UBC Library and the UBCO Library are not equivalent, for instance in terms of size, budget, collections, staffing, and campus footprint. There are two separate budgets maintained and the “firewall” keeps the budgets separate. There is no cost sharing of common costs, other than collections. Adoption of the UC model would necessitate a significant change in the financial culture of the UBC organization. It would result in net allocations from the UBCO Library to the UBC Library, including shared costs for all e-resources in accordance with the academic population and a contribution to support technology infrastructure, such as the library catalogue and services rendered, e.g., cataloguing and processing, to name a few. Thus, this model could have a significant and likely unaffordable financial cost to the UBCO. In any case, the current “budget firewall” and overall financial governance for the campuses seems to preclude this arrangement.

If UBC was to change the financial governance and adopt the University of California model for the libraries at UBC, the UBCO Library might expect some increased participation in decision making related to common services, policies and access to services. However, while preserving structural independence this model might actually create a climate of increased interdependence because some of the areas where UBCO currently enjoys autonomy could become subject to common policies. Based on the UC model, one might expect a common framework for collection development, the provision of strategic services, access to services and overall library direction. That is, with some of the benefits afforded by the model, there is also a potential loss of autonomy in key areas. The Review Committee heard numerous comments about the importance of this autonomy, which deserves some scrutiny: on balance, autonomy may not be as important as the benefits to Library users, which are derived from being part of the larger UBC Library system.

Autonomy as a stand-alone UBCO Library might not lead to more participation on various consortial and association boards, which has been stated as a desired outcome of a separated governance model. If the adoption of the UC model resulted in the UBCO Chief Librarian garnering opportunities to join Canadian library organizations -- similar to some of the UC libraries independently joining ARL -- the Committee heard that this would mitigate some of the problems of isolation and the lack of a forum for collegial professional support for UBCO Library personnel. However, independence and the UC model itself is not “the ticket” or the key to membership. In the UC system, not all institutions qualify to be AAU members or ARL members. They must individually meet the stringent conditions of those organizations. Given the difference in size and structure and the overall governance for UBC, it is unlikely that UBCO Library on its own would be able to attain membership in all of the desired Canadian or regional organizations, simply by adopting the UC model. It would be eligible for regional and some consortial memberships but would lose standing as a research library.

The Review Committee also considered the model at the University of Toronto where, in spite of a fair amount of autonomy for each campus, there is only one Provost and one Board of Governors for the University of Toronto. Another difference is that the two campuses (Mississauga and Scarborough), while retaining budgetary independence, provide allocations to support the central library and technical enterprise systems and collections, with each library contributing additional funds to support the licensing of e-resources. This model would also result in a significant rise in allocations flowing from the UBCO Campus. Both the Mississauga and Scarborough Chief Librarians have a dotted line reporting relationship to the St. George Chief Librarian and are members of his executive leadership team that meets on a weekly basis. All academic matters pertaining to librarians are the responsibility of the Chief Librarian of the University of Toronto, including postings, hiring, ranking, permanent status, and leaves although each campus leads these activities, sending recommendations to the Chief Librarian.

Contemporary research libraries work consortially when possible. It would be antithetical to split the current UBC library system into two separate and completely distinct and autonomous libraries. This would lead to duplication of services, personnel and resources and would likely lead to a diminished ability to support teaching, learning and research at UBCO with a wide spectrum of scholarly materials. A cost-benefit analysis of a complete separation of subscriptions, services, and technology systems would be useful to map gains and losses in such a scenario; in the absence of this data, the Review Committee believes that the UBCO Library would lose more than was gained by the additional autonomy and clarity of reporting structure. The benefits for any library as part of a major research library system cannot be overstated.

Beyond the California and University of Toronto models, most other systems have a somewhat hierarchical structure that flows through one senior leader, usually appointed at the decanal level, as Dean of Libraries or University Librarian. Neither the UC Model nor the University of Toronto model recognize some of the unique attributes in the relationship between UBCO and UBC Vancouver Libraries. None of these models solves the current challenges at UBCO without creating cost and perhaps some unintended consequences. Other models discussed during campus meetings between the Review Committee and the Provost include the University of New Brunswick (UNB) and Dalhousie University models, both single library systems. UNB and the Saint John campus, UNB-SJ, now have one library system, and one president, though since the campuses are two hours apart, there are two senates. The move to consolidate to one library system is recent, to achieve economies of scale as the UNB Libraries, with multiple libraries in the system. Dalhousie recently merged with the Nova Scotia Agricultural College, and there is one library system, with the previously separate NSAC library functioning as one of five within the Dalhousie system. The former University Librarian at NSAC is now an Associate University Librarian, leading for the Dalhousie Libraries with the portfolio of Library Services and serving as Head of the MacRae Library. One university-wide library system eliminates the need for any financial charge-backs and promotes a holistic, equitable approach to resource allocation and shared services. It is very common for a large research library system to include between three and 90 libraries within the system, catering to various geographical and disciplinary needs of the university.

As a final note on alternative models, a few smaller institutions have tried to merge the IT and library units, or have their libraries report to the Chief Information Officer (CIO), an organizational structure that we do not recommend. It appears that this strategy is usually focused on cost-savings and some affinities between the library and information technology. However, the strategy is problematic as it removes the library from the academic portfolio and fails to recognize the importance of the library as “the heart of the campus” and an integral partner in teaching, learning and research. We note this structure because it emerges when organizations are not deliberate about their library and when the need for cost savings predominates. While this is clearly not the environment at UBCO, it is useful to understand what can happen in times of organizational stress and change. It also highlights the importance of a reporting structure for the library that is not only clear and understandable but one that reflects the culture of the organization and its relationship with the library. A change such as this one, where there were no longer at least parallel structures, with the two Library leaders reporting to the two Provosts, would also create an even greater disconnect between the UBCO Library and the UBC Library system, putting at risk the many financial and service dependencies that are in place.

The current model in practice at UBC has one University Librarian, a Deputy University Librarian position (currently vacant), four Associate University Librarians, and a Chief Librarian at UBCO, who does not have an academic administrative appointment that fits into the hierarchy at the associate dean / associate university librarian level. On the UBCO campus, the Chief Librarian is a member of Deans’ Council and a direct report of the Provost’s, and is a valued colleague at the senior administrative level. This positioning on the UBCO campus is worth preserving. The issue lies with the lack of integration into the UBC Library hierarchy in an accountable and authoritative manner, which would open opportunities for the UBCO Library to lead UBC Library initiatives and contribute in a meaningful way as part of the system. The Review Committee met with one Associate Dean who reports to a Dean based in Vancouver, and is the delegated member of Deans’ Council at UBCO; a similar arrangement for the UBCO Chief Librarian, appointed at the Associate or Deputy University Librarian level, but retaining the Associate Provost role at UBCO and membership on UBCO Deans’ Council, would provide the best relationship for the UBCO Library with the UBC Library system and the UBCO campus.

Recommendation One: UBCO Provost and UBC University Librarian and other senior leaders consider a solid line reporting structure for the UBCO Chief Librarian within the UBC Library, and a corresponding title change. This could be at either the Deputy University Librarian level, if there were two Deputy positions created, one for Vancouver and one for Okanagan, or as an associate university librarian with the UBCO Library as part of their portfolio with other system-wide responsibilities. This five-year renewable academic administrative appointment would be concurrent with and in addition to the Associate Provost role held at UBCO, ensuring accountability and integration with both the UBC Library system management and UBCO’s senior leadership team. This will require a review of library administrator roles and the supporting structures to complement and be in alignment with this system-wide role in the UBC Library.

2. Provision of services: How well is the Library meeting the needs and expectations of the University community? Are collections and services adequate to support the University's mission with respect to teaching, learning, and research?

The Library is meeting the University community's needs and expectations. While the number of people interviewed was low, the Review Committee heard glowing testimony from satisfied graduate and undergraduate students, faculty members, Deans, and other UBCO administrators, all indicating that the Library is exceeding expectations and delivering a fulsome array of innovative and productive services.

Access to the impressive UBC Library collections, one of the five largest collections in Canada, is immediate in the case of e-resources, and there is a small but focused collection based at UBCO. Books in the Vancouver-based collections are delivered by inter-library loan and arrive generally within two days, a time considered acceptable by the users we encountered. There are reciprocal document delivery services provided from UBCO Library to the UBC Vancouver campus. There is a cost-sharing agreement in place between UBC Library and the UBCO Library, which allocates financial responsibility for a varying number of e-resource subscriptions to each. This is not an equal division of subscription costs, with UBC Vancouver paying a much greater proportion. Pressures on the UBCO acquisitions budget are predicted to increase now that unique programs are being developed at UBCO; this program will require access to new and relatively expensive scholarly and research resources. The importance of the UBC Library's collection and their ability to continue to support to the UBCO Campus without additional funding from the UBCO Campus may not be sustainable, especially with the projected enrollment growth of the UBCO Campus and their development of unique programs.

The UBCO librarians have developed effective instructional programs, which have varying levels of uptake depending on the disciplines, as is the norm on other campuses. The students particularly appreciate the services offered by the Writing and Research Centre and the frontline Access and Reference services provided in the recently remodeled UBCO Library's main floor. Faculty members mentioned the value of librarian researchers serving on research teams, conducting systematic and literature reviews and doing policy development. New Research Data Management (RDM) services are emerging in tandem with national initiatives and local requirements, and UBCO will be able to respond to Tri-Agency requirements as Open Access policies are implemented. The Library is active in supporting faculty-led Open Science initiatives and is viewed as a partner in this endeavor. Digitization, archiving and records management services are being developed and are now housed in a bright, climate-controlled facility in the Commons, injecting new capacity for physical and programmatic growth in this area.

Librarians noted increasing workload pressures as they continue to deliver customized and personalized research and teaching services to students and faculty, and note the growth of new 'portfolio' roles in addition to their liaison librarian responsibilities. New services required in a research library are being developed by librarians who have expressed an interest in leading in these areas, and balancing the portfolio role with liaison duties is an increasing challenge with the growth in enrolment. There is a desire to continue the high-touch, personal services that are endemic at the UBCO Campus.

With growth, this may require new structures that are scalable to develop a sustainable model of high quality services. There are several vacant positions, which, if filled, would reduce the workload pressures in the UBCO library system. While there may be strategic reasons for keeping the positions vacant and potentially adaptable for future services, there is a tradeoff between maintaining flexibility and reducing stress in the system.

Recommendation Two: The current mechanism for including UBCO Library input into new program development be preserved and strengthened to ensure, as new programs are created, that the additional requirements for scholarly resources are considered and adequately funded, in most cases through a transfer of additional funds to the Library's base acquisitions budget.

Recommendation Three: Consideration should be given for ways to index growth of UBCO Library librarian and staff complement to the growth of student enrolment and faculty size. While many library services are scalable and can be adapted to serve larger numbers of students with the same staffing levels, UBCO is known for high quality, individualized attention to students and faculty, and it would be a loss to the community if Library services cannot be sustained with some personalized elements remaining. Additionally, there is an increasing demand for services to support the research enterprise, digitization, records management, and scholarly communications, all placing demands on a relatively small cadre of library staff.

Recommendation Four: Recognizing the time demands on the Vice Provost and Chief Librarian, vacant positions should still be filled as soon as possible.

3. Leadership and administration: How effective is the overall leadership of the University Librarian and the senior management team? In what ways, and to what effect, does the administration consult with Library staff and users? What steps has senior administration taken to strengthen the Library's reputation nationally and internationally?

The Review Committee heard repeatedly that the Chief Librarian is highly respected and is extremely effective in her role. The Library team expressed confidence in the Chief Librarian as leader and champion of the Library, and appreciate her ability to advocate for resources for the Library. The Chief Librarian's ability to engage and consult with staff and users was praised and mentioned frequently. Staff and librarians are accustomed to being fully included at a very early stage on all new initiatives and appreciate knowing the rationale for decisions made, and in many cases their ability to influence decision-making. We also heard librarians, staff, and faculty members speak well of the UBCO Deputy Chief Librarian's ability to manage the day-to-day operations in a collaborative manner.

The changing role of research libraries, which aligns with the changing nature of teaching, learning and research, will require greater dependency on enterprise systems and technologies deployed through UBC Libraries. It is imperative that the Chief Librarian UBCO and the UBC University Librarian align resources and strategy, model strong working relationships, and develop structures to support the realization of their respective yet complementary visions for library services at the two campuses. This

will require inclusion and integration in the planning processes for these systems, to ensure there are no unintended consequences that undermine the strategic directions of both library systems.

Within the UBCO Library, there were indications that the level and frequency of consultation and engagement by the Chief Librarian with library staff has fallen away over the past year or two. This can likely be attributed to the considerable demands placed on the Chief Librarian as project manager during the design and construction of the Commons; this left little time for the previous practice of extensive consultation and discussion, though the frequency of meetings with librarians and staff is still impressive and above the norm for most research libraries. Comments from staff and librarians indicate that attention needs to be paid to ongoing internal communications practices during this time of growth and transition, to ensure they still feel informed, consulted and well represented. The nature of the communications may need to become more asynchronous and varied than in the past, as the hours of operation for the Library and the demands on staff time at every level increases. The Review Committee believes that the Chief Librarian is mindful of this situation, and there is no recommendation required in this report.

It was clear that the Library is an integral part of the academic community at UBCO as evidenced by the Chief Librarian's participation on Deans' Council and through the variety of academic support services provided through or in conjunction with the Library. To support the academic mission fully, it is important that the Library continue to be led by a librarian with a MLIS, PhD or equivalent degree in Library and Information Science.

Recommendation Five: Intentional and meaningful bi-directional input and consultation in the strategic planning processes for the libraries at each campus is essential for the achievement of their academic missions. Developing structures and shared accountabilities in these areas will support these activities. Focusing on a couple of collaborative initiatives would provide a means to develop best practices for sustainable, mutually beneficial working relationships. This could contribute to increasing the national and international reputation of the libraries and the university.

4. Infrastructure and Resources: The reviewers should consider the physical and financial resources of the Library, including its space, teaching facilities, equipment, and financial base. Is the Library adequately resourced to support innovation in learning and research, and to develop collections in support of new academic programs?

The UBCO Library's budget is adequate for current needs, but does not have any indexing for annual inflationary increases, which will eventually lead to problems, given that scholarly publication pricing includes annual inflationary increases of between 2 and 6%. Additionally, unfavourable currency exchange, in particular with the United States, presents additional challenges for the acquisitions budget.

It appears that it is difficult to provide adequate collection support for new programs at UBCO that have no presence at UBC Vancouver. While interlibrary loans and document delivery provide some solutions, the budget mechanism makes it difficult to build a collection for unique programs.

Recommendation Six: Best practices for the protection of acquisitions lines, annual inflationary indexing and mechanisms to protect against currency fluctuations be examined and implemented for the UBCO Library budget. However, any new indexing should be consistent with practices at UBC Vancouver libraries.

Recommendation Seven: A review of the distribution and sustainability of budgetary allocations to support UBCO Library growth be undertaken by the UBC University Librarian and the UBCO Chief Librarian.

5. Internal and external relationships: The review should examine the relationship between the various branches of the Library system, including UBC Vancouver, UBC Okanagan, the hospitals, and the “satellite” libraries that are part of the system. The review should also evaluate the working relationship of the Library with academic faculties, departments, institutes, and centres, to determine how effectively the Library is meeting their needs.

The internal relationships among other units and Faculties at UBCO are excellent and it is clear from discussions with campus leaders that the Library is perceived as a problem solving, collaborative partner. Though the Review Committee did not meet with representatives from the hospitals and Southern Medical Services, it is our understanding that the relationships are positive and that appropriate access to scholarly resources is provided between the UBCO Library and healthcare facilities. There were no representatives from centres and institutes present in the Review meetings, but any difficulties would likely have been raised by the Deans and this was not the case.

The relationship that is flourishing the least is that with UBC Vancouver. This seems to be a residual effect of the amalgamation of two university libraries of very different sizes, one recently transformed from a college library serving a primarily undergraduate population with a strong emphasis on teaching excellence, and one with national status as a preeminent research library supporting a research-intensive university. While there has been much gained by each library with the merger, and the relationships are respectful, the size difference and the lack of formal integration of management teams has created a situation where trust and collaborative working relationships have not been able to thrive. As outlined earlier, a more clearly enshrined leadership structure will reassure colleagues in the smaller library that their voices are valued and by design guaranteed to be heard. After a leadership structure is better defined, and some resulting committee membership adjusted, more parity will be evident in the system. More participation on truly system-wide committees and project initiatives by UBCO Library personnel will enable collegial relationships to grow and new opportunities for collaboration to be identified. With video-conferencing capabilities, there is no geographic impediment to full participation and leadership emanating from the UBCO Library.

Recommendation Eight: Explore ways to increase participation on UBC Library committees and project initiatives by UBCO librarians and staff, to demonstrate collegiality and to ensure the UBCO perspective is incorporated in planning and decision-making. Conversely, consideration should be given for ways to encourage participation by UBCV librarians and staff on UBCO-led committees, and

with the upcoming Strategic Planning process for the UBCO Library. Ideally, this planning process will include the University Librarian as well.

6. Community Engagement: In what ways, and how effectively, is UBC Library engaging with the broader community in British Columbia and beyond? What role is it playing in lifelong learning locally, nationally, and internationally?

As noted above, the UBCO Library is praised for exemplifying the University's mission to be of service to the community. The reciprocal relationship with the Regional Public Library, with a service point for the public library in the UBCO Library, and the UBCO Library's Innovation Library located downtown in the public library, increases visibility and use for both library systems. Faculty, staff and students commented on how much they appreciate the service on campus. One stakeholder noted that libraries are playing a role as a portal for community engagement, and that UBCO has an active and open interest in trying to make the Library a resource for the community, more welcoming and accessible to all, such as the Innovation Library. The Innovation Library, while interesting at a conceptual level, has yet to hit its stride, but proposed changes to the staffing and the proximity of potential partners in the downtown core should lead to increased engagement.

The UBCO Library is also developing important relationships with Indigenous communities in the region, and assisting with the preservation of valuable archival and heritage materials, through the Digitization Okanagan History initiative. Indigenous communities in the Okanagan Valley differ from those on the lower mainland, and elsewhere in BC; it is not possible for the UBC Library system to fully address the needs of all of these communities nor would it be appropriate, as these communities are self-determining. However, important relationships are being established and expertise in digital preservation, digitization, and the creation of oral histories is being shared with area museums, archives and Indigenous libraries. This in one area that particularly benefits from the independence of the UBCO Libraries as works well because there is no common UBC overarching policy or priority relative to building relationships with indigenous peoples.

Lifelong learning is becoming increasingly valued in the age of rapidly evolving technology, changing career options, and the need for new literacies — digital, data, visual, and algorithmic literacies are needed to ensure the success of engaged productive citizens. The UBCO Library and Learning Commons offers a "Third Space" outside of the home and the classroom, where informal learning can occur and expert research assistance is available. Similarly, in an online environment, the Library can be a pervasive presence providing access to resources and services. The Review Committee did not hear much discussion regarding lifelong learning but it is a recognized key deliverable for many types of libraries.

Recommendation Nine: In the forthcoming Strategic Planning process for the UBCO Library, a strategy for continued community engagement, and the support of lifelong learning, should be considered in light of existing and anticipated needs.

Recommendation Ten: Conducting user research to develop a vision and functional program for the Innovation Library would go a long ways to ground this entity for a vibrant future.

7. Operations: The reviewers should consider the daily operations of the Library in terms of efficiency, working conditions, and staff morale. Are the physical spaces occupied by the Library appropriately serviced and maintained? How does the Library implement the University's employment and education equity policies?

Daily operations in the UBCO Library are noteworthy in several ways: there is a high degree of collegiality, and perhaps as a result a high degree of interaction on a daily or weekly basis among all staff. The frequency of staff meetings and the amount of formal and informal training provided, combined with regular social events, have resulted in a cohesive, convivial team who enjoy working together and almost universally feel well supported in their various roles.

There is some indication that growth in responsibilities and activities for the Library leadership has resulted in a decline in communications and meetings, but this was largely due to the demands of the Learning Commons construction; a restoration to previous levels of engagement is anticipated. Staff and students spoke enthusiastically of the renovation to the first floor of the Library, corresponding to the opening of the Commons, and are pleased that attention was paid to this. The new service desk has been praised by everyone with whom the Review Committee met, with the height-adjustable service counters, barrier free entry points for service, and transparent service delivery interspersed with student seating.

The UBCO Library is commended for its efforts to develop cultural competencies with their staff. The Review Committee was not presented with data relating to the University's employment and education equity policies, nor was there discussion of this. This may be an indication that there is no issue to be addressed here, but as an observation, the personnel in the UCBO Library do not seem to reflect the population served, as the University approaches 25% international student enrolment, and 10% Indigenous student enrolment. As with all universities in Canada, more attention can perhaps be paid to EDI initiatives.

Recommendation Eleven: Work with UBC HR programs to review UCBO Library hiring practices to develop recruitment and retention strategies to increase the percentage of staff who reflect the composition of the student and faculty corps.

Recommendation Twelve: Work with the University Librarian to explore the development of a library system-wide program to expose undergraduates to the library and information science profession as a career option. While this is a long-term strategy, it will serve to add much-needed professionals from historically under-represented populations to academic research libraries.

8. Future development: The review should identify the challenges and opportunities facing the Library, and to make recommendations about possible directions for its future growth and development.

Challenges that the Review Committee witnessed and discussed more generally in the section on governance, pertain to the increasing tension vis a vis technology systems, services, and expertise resident at the UBC Vancouver campus and are required by UBCO Library. Areas such as repositories for digitized material, and metadata services -- essential for the digitization program and research data management -- are considered under-served at the UBCO Library, because they are dependent upon the services and expertise of the UBC Vancouver Library. It is essential that the two library systems work collegially to arrive at a sustainable path forward.

There are differences between an academic library designed to support teaching and learning and a research library that has a mandate to provide an array of collections and services to support not only teaching and learning but research. Engaging as a research library requires a broader array and generally more expensive collections and a range of other services and infrastructure. UBCO benefits from the research library environment at the UBC Vancouver campus. However, a research library also has greater obligations to do due diligence on all initiatives and projects and to consider the scalability and sustainability of collections and services. It also must uphold rigorous standards that facilitate interoperability, appropriate access and authentication management, long-term preservation etc. These requirements have implications for staffing -- skills and experience -- and governance. This diligence suggests that a research library is rarely as nimble and responsive as libraries operating in a non-research focused environment. There is a tradeoff between expediency or nimbleness and meeting the requirements of a research library. UBCO libraries are at a critical juncture where they must determine whether it is more important to align as a research library with UBC Vancouver or remain more nimble and responsive in undertaking projects. This is not to suggest that by aligning as a research library all nimbleness is lost but rather to suggest that as a research library, UBCO would have to recognize additional or more stringent standards and policies. Compliance with standards and policies is likely to require an enhanced staff commitment and elongated timeframes to advance projects and implement new services.

Recommendation Thirteen: To address critical areas of need, it is essential that the University Librarian and Chief Librarian collaborate on the development of sustainable set of best practices for services that utilize the talent and expertise at both campuses.

List of Recommendations

Recommendation One: UBCO Provost and UBC University Librarian and other senior leaders consider a solid line reporting structure for the UBCO Chief Librarian within the UBC Library, and a corresponding title change. This could be at either the Deputy University Librarian level, if there were two Deputy positions created -- one for Vancouver and one for Okanagan -- or as an associate university librarian with the UBCO Library as part of their portfolio with other system-wide responsibilities. This five-year renewable academic administrative appointment would be concurrent with and in addition to the Associate Provost role held at UBCO, ensuring accountability and integration with both the UBC Library system management and UBCO's senior leadership team. This will require a review of library administrator roles and the supporting structures to complement and be in alignment with this system-wide role in the UBC Library.

Recommendation Two: The current mechanism for including UBCO Library input into new program development be preserved and strengthened to ensure, as new programs are created, that the additional requirements for scholarly resources are considered and adequately funded, in most cases through a transfer of additional funds to the Library's acquisitions budget.

Recommendation Three: Consideration should be given for ways to index growth of UBCO Library librarian and staff complement to the growth of student enrolment and faculty size. While many library services are scalable and can be adapted to serve larger numbers of students with the same staffing levels, UBCO is known for high quality, individualized attention to students and faculty, and it would be a loss to the community if Library services cannot be sustained with some personalized elements remaining. Additionally, there is an increasing demand for services to support the research enterprise, digitization, records management, and scholarly communications, all placing demands on a relatively small cadre of library staff.

Recommendation Four: Recognizing the time demands on the Vice Provost and Chief Librarian, vacant positions should still be filled as soon as possible.

Recommendation Five: Intentional and meaningful bi-directional input and consultation in the strategic planning processes for the libraries at each campus is essential for the achievement of their academic missions. Developing structures and shared accountabilities in these areas will support these activities. Focusing on a couple of collaborative initiatives would provide a means to develop best practices for sustainable, mutually beneficial working relationships. This could contribute to increasing the national and international reputation of the libraries and the university.

Recommendation Six: Best practices for the protection of acquisitions lines, annual inflationary indexing and mechanisms to protect against currency fluctuations be examined and implemented for the UBCO Library budget. However, any new indexing should be consistent with practices at UBC Vancouver libraries.

Recommendation Seven: A review of the distribution and sustainability of budgetary allocations to support UBCO Library growth be undertaken by the UBC University Librarian and the UBCO Chief Librarian.

Recommendation Eight: Explore ways to increase participation on UBC Library committees and project initiatives by UBCO librarians and staff, to demonstrate collegiality and to ensure the UBCO perspective is incorporated in planning and decision-making. Conversely, consideration should be given for ways to encourage participation by UBCV librarians and staff on UBCO-led committees, and with the upcoming Strategic Planning process for the UBCO Library. Ideally, this planning process will include the University Librarian as well.

Recommendation Nine: In the forthcoming Strategic Planning process for the UBCO Library, a strategy for continued community engagement, and the support of lifelong learning, should be considered in light of existing and anticipated needs.

Recommendation Ten: Conducting user research to develop a vision and functional program for the Innovation Library would go a long ways to ground this entity for a vibrant future.

Recommendation Eleven: Work with UBC HR programs to review UCBO Library hiring practices to develop recruitment and retention strategies to increase the percentage of staff who reflect the composition of the student and faculty corps.

Recommendation Twelve: Work with the University Librarian to explore the development of a library system-wide program to expose undergraduates to the library and information science profession as a career option. While this is a long-term strategy, it will serve to add much-needed professionals from historically under-represented populations to academic research libraries.

Recommendation Thirteen: To address critical areas of need, it is essential that the University Librarian and Chief Librarian collaborate on the development of sustainable set of best practices for services that utilize the talent and expertise at both campuses.

Appendix 1: Schedule and List of Interviewees

External Review: LIBRARY SERVICES					
Wednesday, February 13, 2019		Thursday, February 14, 2019		Friday, February 15, 2019	
Time	Room: ADM 101	Time	Room: EME 4116 until 3pm	Time	Room: EME 4116

7:30 - 8:30	Dr. Patricia Lasserre , Associate Provost Enrolment and Academic Programs	8:00 - 9:00	Breakfast - Grad Students (1)	8:00 - 9:00	Breakfast - Undergrad Students (5)
8:30 - 9:30	Heather Berringer , Chief Librarian	9:00 - 10:00	All librarians	9:00 - 10:00	Todd Zimmerman , Associate Director, IT Engagement Services Peter Newbury , Director and Senior Advisor, Learning Initiatives, Centre for Teaching and Learning Stephanie McKeown , Dchief Institutional Research Officer Rosemary Thompson , Manager, UBC Studios Michelle Lamberson , Director Flexible Learning Special Projects (regrets)
9:30 - 10:30	Phil Barker , VP Research - will phone in Janice Larson , Tri- University Partnership Office Kristen Korberg , Manager Office Research Services	10:00 - 10:30	Library and Commons Tour - Barb Sobol	10:00 - 11:00	<i>Break</i>
10:30 - 11:00	Robert Janke , Associate Chief Librarian; Lois Marshall , Manager Planning and Operations; Margaret Doyle , Digital Storyteller Communications Officer (regrets)	10:30 - 11:00	Dr. Deborah Buszard Deputy Vice- Chancellor ADM 102	11:00 - 11:30	Heather Berringer , Chief Librarian
11:00 - 12:00	<i>Break</i>	11:00 - 12:00	<i>Break</i>	11:30 - 12:00	<i>Break</i>

	Lunch with Deans: Dr. Gordon Binsted , Dean FHSD (regrets) Dr. Bryce Trasiter , Dean FCCS Dr. Reghan Sadiq , Associate Dean, School of Engineering				
12:00 - 1:00	Dr. Barb Rutheford , pro tem Dean, IKBSAS Dr. Dwayne Tannant , pro tem Dean, College of Graduate Studies Dr. Roger Sugden , Dean Faculty of Management Dr. Allan Jones , Regional Associate Dean, Southern Medical Program	12:00 - 1:00	Lunch - Undergrad Students (4)	12:00 - 1:30	Lunch: Dr. Patricia Lasserre , Associate Provost Enrolment and Academic Programs
1:00 - 1:30	<i>Break</i>	1:00 - 1:30	<i>Break</i>		
1:30 - 2:00	Ian Cull , AVP Students Rob Einarson , AVP Finance and Operations	1:30 - 2:00	Staff - first group		
2:00 - 2:30	Chris Brunet , Finance Manager	2:00 - 2:30	Staff - second group	1:30	Working Session at Four Points
2:30 - 3:00	<i>Break</i>		ROOM CHANGE: ADM 006a:		
3:00 - 4:00	Campus Tour	3:00 - 4:00	Faculty		
4:00 - 4:30	Susan Parker - skype	4:00 - 4:30	rsvp: Karis Shearer 330; Tamara Freeman;		
5:00	Working Session and Dinner at Four Points	5:00	Working Session and Dinner at Four Points		