Re-Envisioning The Library
Library Service Models Self-Study Team Report

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Executive Summary for the Library Service Model Self-Study Team’s Report

Charged in January 2012, the Library Service Models Self-Study Team (LSM) was one of two teams created by the Re-envisioning Library Service Initiative.¹

From January 26th until April 11th, LSM met weekly to visualize viable and sustainable models for providing excellent service within the reduced resources available to the Library. The team of twelve drafted service option overviews for essential library services, including access to collections, acquisitions, cataloging, circulation & stack management, instruction, reference, reserves, and web services. Consideration was given throughout to open hours and the campus reliance on current library spaces for study. LSM was tasked to determine viable levels of non-librarian staffing for service models; librarian assignments fall within the purview of the Role of the Librarian Self-Study Team.

Scope²
Selection duties (deciding what to buy, reviewing licenses, determining the appropriate level of cataloging, determining shelving location and making replacement and preservation decisions) were outside the scope of this group’s work, since they are performed by librarians. Library Human Resources, Library Business Services and Library Systems were also out of scope; these are under current review as part of the campus’ Operational Excellence initiative. Graphics, Interlibrary Services, and Preservation were also considered out of scope since they are already highly centralized.

All other Library locations/services were in scope, including Collections Services (Acquisitions, Licensing, Cataloging, Gifts and Exchange) and 24 other locations/services (Doe/Moffitt circulation, privileges, stack maintenance, reference and instruction, Art History/Classics, Graduate Services, South/Southeast Asia Library, and Morrison Library; the East Asian Library; the Bancroft Library; and the subject specialty libraries.

Process

The process included defining
- Step 1, Service options: brainstorming how traditional services could be offered in new, more efficient ways.
- Step 2, Types of Libraries: de-coupling the full complement of services, so that some libraries would concentrate on only a subset of services, for considerable savings in staffing costs.
- Step 3, Service Models: grouping types of libraries to provide full service across the campus

The Team both distributed written overviews to Library staff via email, and held open meetings to discuss them.

¹ Re-Envisioning Library Services, http://www.lib.berkeley.edu/AboutLibrary/re_envision.html
² A full list of in-scope and out-of-scope library services is included as Appendix A to the Executive Summary for the Initiative, http://www.lib.berkeley.edu/UCOnly/re-envision_exec_summary_4-18-12.pdf
Recommendation

LSM developed two models, and recommends that The Library hold Model 1 as its long-term goal.

- **Model 1**: consolidate 24 library locations into 8-9 full service libraries based on subject affiliations, format, and population served.

- **Model 2**: consolidate existing locations into a 5-7 service clusters, each with one full-service “hub” location that manages a small number of circulation-only service libraries. The more clusters, the fewer circulation-only libraries would be supportable library-wide.

The LSM Team recommends Model 1 as it will provide the best service, while being the most sustainable over an extended period of time. Model 1 is preferred over Model 2, as it:

- uses only full service libraries, which will be less confusing for people than having to understand what services are provided (or not) in the different types of libraries used in Model 2;
- consolidates collections, services and staff that will better serve an increasingly interdisciplinary faculty and curriculum;
- maximizes the number of full-service libraries, ensuring people are closer to a full-service library;
- provides extended open hours in more locations than many disciplines receive now;
- provides more flexibility to develop new and enhanced services in the long-term;
- allows for more staffing in each full-service library, which provides for increased collaboration and staff backup;
- minimizes management complexity compared to Model 2, which requires remote supervision of staff and students in circulation-only libraries; and
- allows for more stability given the possibility of future budget cuts, as Model 2 has more locations with minimal staffing levels that are more difficult to keep open if staffing is additionally reduced.

LSM also provides advice on how the Library could transition from its current service model to Model 1. These ideas include using methods such as transitional circulation-only libraries, electronic reading rooms and on-campus storage locations.
Introduction and Charge to the Library Service Models (LSM) Self-study Team

The Library Service Models Self-study Team was charged to explore and recommend sustainable service model options for the Library. The full charge, found in Appendix A, includes this quote:

“What is needed is a new landscape for library services, one that we can all share comfortably. The recommended model for this new order must be viable within the Library’s reduced operations budget.”

This team’s charge focuses on library staff and the services they provide across a range of locations. It complements the charge of the other self-study team, Role of the Librarian, that explored librarian responsibilities and how these would be assigned under three separate scenarios – employing 50, 60 or 70 librarians. The Role of the Librarian scenarios determine the funding available for staff after the librarian costs are removed. Thus, the Library Service Models charge also has three scenarios based on the funding left available for staff-based services.

For each scenario, the Library Service Models Team was directed to identify service model options, “the associated staffing levels, costs, benefits and drawbacks of each model,” and then to “recommend a sustainable framework for library services (which will include one model, or a combination of models) for each of three budget scenarios.” Finally, the charge directed the Team to “document any special issues or considerations that might assist both users and library staff with the transition, beginning in 2012 and over 2-5 years, from the current service model to the implemented model.”

Addressing the Charge

To organize its work, the team adopted the following terminology.

- **Service options** – The range of options for how each service provided by the Library could be re-envisioned and implemented in a new way. Examples of services include circulation, reserves, reference, instruction, etc.
- **Types of Libraries** – Any single library location could provide a range of services, from a minimal-service “on campus storage location” to a full-service library. The Team discussed and defined library types and the services options that could be used within each type.
- **Service Models** – Models are combinations of library types that could be evaluated for their benefits, drawbacks and costs.

The first task the Team addressed was to identify relevant services provided by the Library. For each service, there was an initial discussion and then a sub-group wrote an “overview document” that described the options for providing this service, along with the pros and cons of each. These were then shared with library staff for input, both via email and in a series of open meetings, after which a final version was created.
With a shared understanding of library services and optional ways they could be provided, the Team began to think through these questions,

- How could we package services into different types of libraries? and
- What number of staff at what classifications would be needed in each newly conceived type of library?

Given answers to these questions, a spreadsheet modeling tool was developed, using average salaries for these staffing profiles to determine how much each type of library would cost. The tool allowed us to also take the next step: vary the number and types of libraries in various mix-and-match combinations and determine the cost of each. We could then select models from all the mix-and-match combinations that would be viable given any of three different budget scenarios.

It is important to note that the use of modeling to think through staffing and costs is an important tool in our process, but is not meant to be prescriptive in implementation. Our models are at a high level, using informed estimates and averages, and making recommendations on providing services, but not delving into the details. The main purpose of modeling is to provide some plausible options that can be used to spark and inform discussion in the campus wide review. There will be flexibility to work out the details during implementation planning dependent on disciplinary needs.

The process described above resulted in the detailed service model options described in the section of this report titled “Recommended Service Options.”

**Rubric for success**

The LSM Team came to believe that a successful service framework will

- foster excellent and improved services ("change” does not mean “loss"),
- reflect what’s best for the campus as a whole by providing service for all departments and campus user groups that match their varying and demonstrated needs,
- attend to the user experience holistically, focusing on coherence and seamlessness,
- pair disciplinary needs to the best model for services, and
- be modular, so that implementation can happen over time without needing shifts in paradigm.

**Service Options**

The LSM Team identified essential library services, discussed different ways to provide these services, wrote overviews, and vetted these with library staff. The full text of each Overview is available.³

³ *Library Service Models Self-Study Team Overviews. April 18, 2012*  
http://www.lib.berkeley.edu/UCBonly/LSM Overviews 4-18-12.pdf
Access to Collections

Libraries and their collections have long been intertwined, with the size of one a key indicator of the quality of the other. The Library’s collections are rich and deep, as befits a major research library.

Features: Each of the twenty-four libraries that comprise The Library contains a mix of digital and physical formats. In addition to open stacks, most libraries include microforms, course reserves, permanent reserves, reference, rare, and unbound periodicals with a variety of access restrictions. Some also contain DVDs, maps and other non-book formats, and closed stacks or compact storage. Some libraries have an adequate amount of space, including growth, and others do not. The estimate that the Northern Regional Library Facility (which has provided off-site storage for low use items for twenty years) will be full within 3-4 years has increased the pressure on storage space on campus.

Current Statistics:

- Library-wide circulations, renewals and sweeps of print resources (excluding reserves): 1.3 million/year
- Gate counts would be useful in the future.

Standardization: With an eye to making sure that all disciplines are equally well served, the Library could benefit from looking holistically at the space required to “right size” the collections and decide which material should remain on campus across all library owned spaces. Since it is staff intensive to provide access to “closed stack” material; having it in more places may limit the hours when it can be used.

Consolidation: Consolidation could be subject-based and/or format-based. Users who now use multiple libraries might be better served from a larger consolidated collection.

Collection Footprint: Reducing the space collections require on campus could allow for increased space for individual and small group study areas and for instruction and library events. It would also allow the library to shift staff from the processing of physical objects to increasing support for digitization (Reserves, for example) and for access to online resources and digital collections. Note: this reduction of the physical collection (via weeding) assumes that unique monographs can be transferred to NRLF. For journals, WEST is developing a collaborative archive. Other storage options may need to be investigated.

Equipment and Technology: Digitization of print will allow some researchers to access material when and where they want it. Additional enhancements to catalog records (such as scanned table of contents) will allow users to see inside the book or journal, and decide whether or not to request the entire object – or digital copy. If The Library is digitizing items, e.g., for reserves, additional scanners and training may be needed to provide this functionality.
Options

A. Many Discrete Collections (Current)
B. Reduced Print Footprint with no consolidation
C. Reduced Print Footprint with consolidation
D. Mix of Print Intensive and Digital Intensive Libraries

Acquisitions

The acquisition of Library materials is an essential function for the library. Acquisition of materials is an important step toward making materials available to our clientele. The Acquisitions Department serves the various libraries on campus and the campus community as a whole by acquiring important research materials for the various libraries on campus.

Note: UC is currently engaged in a rigorous evaluation of how acquisitions might be improved by considering it a UC-wide shared endeavor. Berkeley’s acquisition-related organization and services will be shifting over the next few years in response to this UC-wide review.

Features: Acquisitions includes ordering monographs, serials and e-resources; receiving and updating catalog records for monographs and serials; verifying and maintaining access to e-resources, processing government documents, managing the Gift & Exchange programs and reporting on use of collections funds. The majority of the acquisitions functions happen in the Acquisitions Department within Collection Services, and within 3-4 other Subject Specialty Libraries performing their own acquisitions.

Current Statistics: There is a great need for acquisitions functions, including ordering, receiving and processing library materials. For example, approximately 34,000 active serials titles need processing each year. This includes but is not limited to, payment for purchase titles, monitoring funds, claiming, check-in, problem solving, binding, cataloging, and general record maintenance.

Centralization/Consolidation/Standardization: Re-locating acquisitions and processing work now performed in the subject specialty libraries would free those staff up for other types of work, reduce duplicative work, create consistency in catalog and order records, and avoid accidental duplication of materials.

Equipment and Technology: Our integrated system, the Millennium client, is an important tool for performing our acquisitions functions. Various aspects of Acquisitions requires equipment such as dot matrix printers, laser printers, copiers and fax machines. Our Electronic Resources Unit, an integral part of Acquisitions, has an electronic technology and equipment footprint that is not as easily seen as other aspects of Acquisitions.
Options:
A. Partial recentralization
B. Centralizing to the Hub level
C. Complete centralization
D. Status Quo

Cataloging

The UCB Library’s six cataloging units are responsible for receiving, cataloging, and processing materials in all formats and languages, for the maintenance of catalog records, and for quality control within the OskiCat online catalog for all Library locations on campus. Without these services, the Library’s collections would not be discoverable by UCB faculty, students, and other Library users.

Note: UC is currently engaged in a rigorous evaluation of how cataloging might be improved by considering it a UC-wide shared endeavor. Berkeley’s cataloging organization and services will be shifting over the next few years in response to this UC-wide review.

Features: Cataloging comprises original and copy cataloging for monographs, journals, manuscripts, rare books, electronic resources/collections, recorded and print music, maps, motion pictures and videos. It also includes processing of pictorial collections. Currently Collection Services provides cataloging services to most of the Library. Specialized cataloging for specific languages occurs in EAL; for special formats in Earth Sciences/Map, Music, and the Media Resource Center; and in The Bancroft for its special collections.

Current Statistics: In the past twelve months the Library added over 200,000 records to OskiCat representing new resources available to the UCB community. The growing trend in library cataloging is for publishers and vendors to provide (either free or for purchase) catalog records for materials purchased by libraries. UC Berkeley’s broad and deep collection results in thousands of new materials coming from sources (vendors, publishers, governments, etc.) who are not able to supply bibliographic records for the catalog. The Library’s staff created and added over 60,000 of these records to OskiCat. Without these records, almost 30% of the Library’s new materials would not be discoverable by UCB faculty, students, and other Library users.

Standardization: For a catalog to be most useful, thoughtful cataloging practices must be consistently adhered to. Centralizing work and/or training to do the work would likely result in better catalog records.

Centralization/Consolidation: Combining some staff who are currently dispersed would allow for cross-training and backup, which is particularly important in areas where retirements have or will soon occur. It would facilitate consistent use and application of Library standards, procedures and processes and would reduce some duplicative work.
Equipment and Technology: Library cataloging units use OCLC\(^4\), the international cooperative database of catalog records in coordination with the Library’s integrated library system (OskiCat). We also use a variety of automated data input techniques such as macros, constant data records, and record templates. Some catalog records are created by machine from vendor supplied metadata.

Outsourcing: Cataloging services are available on a contract basis. Reliable vendors could, by providing lower level or specialized-language records, free up in-house staff for more specialized and difficult cataloging. Users, in both instances, would have access to materials sooner than they do now.

Options (Note: some or all of these options could be used together to accomplish different goals.)
A. Status Quo
B. Outsourcing is used to provide cataloging services
B2. Some cataloging services are centralized – Hub, no cluster model
C. Some cataloging services are centralized and use of outsourcing is increased, especially in areas currently lacking expertise

Circulation and Stack Management Services

Circulation and stack management functions are crucial to providing access to library resources. They often represent the “frontline” of library users’ experiences in the library. The visible public services on offer are built on an infrastructure of work performed behind the scenes.

Features include answering users questions, checking items out and in, placing holds and searches, scheduling library spaces, reshelving materials used in-library as well as items that are returned, new book management, maintaining equipment and facilities, and providing security for collections and people. The Library currently provides circulation and stack maintenance in all library locations.

Current Statistics: 1 million circulations; 225,000 in-library uses; 143K items identified and processed for storage; 5.2 million volumes and over 18 million items in other formats are on campus. Counts of directional and informational questions and searches performed would be helpful in future.

Standardization: Loan periods and billing policies could be usefully standardized.

Centralization: Hiring, training and deployment of students

Consolidation: Merging libraries would initially substantially increase need for stack maintenance processes; in the long run, moving more low use volumes off campus would reduce this workload.

\(^4\) OCLC, [http://www.oclc.org/](http://www.oclc.org/)
**Equipment and Technology**: Self-checkout machines

**Options**
1. Try to keep the same service points, but improve service efficiency.
2. Reduce the number of service points and improve services.

**Instruction Services**

Library instruction is a powerful method of introducing students to the breadth and depth of library resources as well as orienting them to the research practices of their discipline. Library instruction generally focuses on four main areas: discovery, evaluation, management of information, and scholarly communication. While increased access to online content might create the illusion that information is easier to access, the increased number of resources, interfaces and access points makes finding relevant and appropriate information more difficult.

**Features**: In-person instruction is provided in libraries and in classrooms, to large groups and to individuals. First-year and transfer students have very different needs than do graduate students; our classes are customized to the users being served. We create online tools such as guides, tip sheets, and web based tutorials as helpful supplement to in-person instruction.

**Current Statistics**: 1,350 group sessions taught, reaching 24,000 participants.

**Standardization**: The complexity, decentralization and non-standardization of Library systems require mediation by Library staff. Time available for other types of instructional support could be freed up if/when systems become less complex.

**Centralization**: Each option assumes that there will be four ongoing positions that will provide non-course related instruction (e.g. ED98/198, L&S 1, orientations) and library-wide support for instruction. This includes a librarian responsible for library-wide e-learning support; a librarian responsible for instruction and outreach to incoming and transfer students as well as the academic support units that serve them; a library assistant IV position that will assist in all these areas, along with providing centralized instruction scheduling and developing and maintaining a centralized instruction web presence; and an instruction coordinator who will work to ensure instruction goals are set and subsequent plans are being met, as well as represent the Library on appropriate Campus committees and task forces. The Instruction Coordinator will work to ensure that the instruction goals are set and subsequent plans are being met.

Regardless of the option chosen, there should be a centralized instructional services presence on the Web site which better explains to faculty, staff and students the breadth and depth of the instructional support the Library provides and how to access these services. This site would also serve as a gateway to instructional materials (guides and tutorials) aimed at our user population.
**Consolidation**: Unlike for some of the other services, “consolidation” does not refer to merging library collections, but to various options for creating networks of backup and support among staff to provide these services.

**Equipment and Technology**: We continually explore and adopt new technologies for teaching, but at this point we don’t feel there is a cost (and time) effective technological substitute for real-time communication and interaction between students and instructor.

**Options:**
A. Course-related instruction provided by subject specialists; non-course related instruction provided by instruction team and other staff.
B. Teams of librarians in disciplinary groups share responsibility for instruction; instruction team handles non-course specific instruction and instruction in RC program.
C. A Library Instruction unit is responsible for most undergraduate instruction; graduate instruction done by subject specialists.

**Reference Services**

As the heart of the campus learning community, the library has the duty to thoroughly acquaint users with information resources, and to teach them to effectively use these resources. Given librarians’ expertise in evaluating, purchasing and using high quality information resources from the Internet, they are well-placed to teach users about the scope of resources and how to use them efficiently. Recent studies and statistics show that an evaluation of the traditional methods of delivering reference services in academic libraries is long overdue. New reference service models are needed that respond to virtual library users and take advantage of new technologies.

**Features**: Questions asked at reference desks fall into five general categories: directional, catalog searching, general resource/databases searching, subject related in-depth research questions, group research visits (combination of the above). Reference services are provided at circulation desks, reference desks, by phone or e-mail, in one-to-one research consultations by appointment or on a drop-in basis. Reference services are currently provided at all libraries; desk hours vary by location. Beginning in 2012, the first point of contact in Doe/Moffitt for basic information and directional questions is at desks located at Doe/Moffitt’s several entrances.

**Current Statistics**: Berkeley answered 83,000 reference questions in 2010-2011. The Association of Research Libraries (ARL) statistics tracks the overall decline of reference transactions. In UCB libraries, the number of reference questions declined from 196,817 in 1999/00 to 77,126 in 2008/09, a 60.8% decrease. Recent studies also show that 90-95% of questions asked at academic reference desks are satisfactorily answered by non-librarians and that the remainder needed to be referred to a librarian or subject specialist. Librarians found that, in general, users prefer in-office research consultations to short answers at a reference desk.
Standardization: The five types of questions asked in a UCB library are best handled by these staff:

1. Directional questions – student employees and classified staff
2. Catalog searching questions – students employees and classified staff
3. General resource/databases searching questions – classified staff and general librarians
4. Subject related in-depth research questions – subject librarians
5. Group research visit (combination of the above) – general and subject librarians

Centralization: Centralize services for informational and directional questions to circulation desks and/or kiosks for self-help. Centralize services for catalog searching and general resource/databases searching to reference desks or e-mail or on-line chat. Centralize subject related in-depth research questions to librarian subject specialists.

Consolidation: Fewer service points, with more staffing, including librarians, and longer hours, would likely increase the amount of time library staff and users are in direct interaction. It also provides a depth of expertise that is not necessarily found when smaller reference operations are distributed more widely.

Equipment and Technology: Online services could be used to greater advantage to match level of expertise to user need. Simple factual questions -- such as library locations, hours, services at those locations, phone numbers, interactive maps & floor plans, etc. -- could be handled by self-service information pages or interactive kiosks/terminals. Online tutorials could answer basic resource questions. Online chat and video-conferencing could facilitate higher level consultations between participants at remote locations, or during hours that library buildings are closed.

Options:
1. Consolidate reference into four or more points by discipline; staffed by current staff
2. Consolidate reference into four or more points by discipline and staff with non-librarians at the front line.
3. Eliminate reference desks entirely; maximize value-added virtual services for self-service; provide connection to person to answer questions via video link

Reserves

Features: Reserves below refers to items put on course reserve for a limited amount of time (usually one semester). In most cases this includes both graduate and undergraduate reserves. Many libraries also maintain a “permanent reserve” collection which is better understood as a non-circulating collection which is shelved separately and is not within the purview of this document. The reserves service provides the opportunity for faculty to request items be put on reserve and for users to check them out. Behind the scenes staff are searching for and editing records in Millennium, physically processing materials, and managing circulation of reserve materials.
**Current Statistics:**
Reserve circulations: items on reserve circulated more than 50,000 times in 2010/11. The number of items put on reserve, and information about any items that do not circulate would be useful in the future.

**Standardization:** Standardization of reserve processes and policies would help the Library more evenly enforce policies, creating a more coherent experience for patrons using reserves.

**Centralization:** A smaller yet more experienced centralized reserve processing workforce would allow for maximum utilization of electronic resources, efficiencies in speed, and greater accuracy and consistency could be gained if processing staff were to work at a limited number of locations and process reserves for all locations.

**Consolidation:** Reducing reserve circulation points would mean increased efficiencies for the Library. Consolidation also has the power to increase or decrease patrons’ access to reserve materials. Reserve circulation consolidation would likely increase the physical distance between patrons and reserves (a decrease in access) but would also increase the hours reserve items are able to be checked out due to reserve checkout being offered only at larger libraries with longer hours (an increase in access).

**Equipment and Technology:**

**Options:**
A. Decentralized reserve checkout, processing, and policies. (CURRENT)
B. Decentralized reserve checkout; Centralized processing and policies.
C. Centralized reserve checkout, processing, and policies.

**Web Services**

Web services are an important and integral component of fulfilling our mission to support teaching and research at the university. As more resources, collections, and services have moved online, our website has become increasingly important in reaching and serving users wherever and whenever they need information. Through our websites and other online tools, we connect users to resources and services, guide users to recommended resources, and answer informational questions about policies, hours, locations, and contacts. The website also serves as an important marketing, public relations, outreach, and fundraising tool.

**Features:** Our current model both allows and requires individual libraries to maintain and design their own websites. Staffing and expertise for web design varies across the libraries, leading to inconsistent user experiences.
Current Statistics and Usability Studies:
- Over 5,000,000 visits in 2010/2011 to www.lib.berkeley.edu

Centralization: Centralizing the work of design would normalize the online environment for the user, help ensure best practices in web design, and free staff to concentrate more on content.

Consolidation: Reducing the number of physical libraries would help to simplify the overall landscape, but would not negate the benefit of evaluating models.

Equipment and Technology: Drupal and/or other content management systems may be deployed to make content creation and management easier.

Options:
A. Status quo, decentralized web design, separate websites based on locations primarily
B. Centralized web design, decentralized content creation based on locations primarily
C. Centralized web design, decentralized content creation based on subjects within disciplinary groups

Using these service options as building blocks, the Team mapped out different ways that these options could be mixed and matched into types of libraries, and finally how types of libraries might be successfully organized across campus into service models.

Recommended Library Service Models

Currently The Library strives to offer a full range of services in all locations regardless of size, staffing, or level of use. This has become increasingly difficult, haphazard, and unsustainable as the size of our staff has diminished through attrition.

The team’s objective was to identify viable, sustainable service models and recommend the one that best provides library services – one that will:
- a. continue to provide excellent library services to all academic departments and programs, and to all user populations,
- b. renew staff’s ability to pursue new and improved services,
- c. reduce workload to match available resources and levels of staffing, and
- d. provide an environment in which staff can thrive.

To determine the viable models, the team examined various options, discussed their pros and cons, and modeled the resources these options would require.
Based on our modeling exercises and discussions\(^5\), we present two models below that we believe are viable and could meet both our staffing constraints and our goals for services. Each model consists of one or more library types and associated service options. Each model has benefits and drawbacks.

The team recommends Model 1 because it is more sustainable, offers more opportunity for excellent service, and provides more flexibility to develop new and enhanced services in the long-term. Aspects of Model 2 and other library types will prove useful during the transition to our new service model.

**Model 1: Large, Consolidated Full-service Libraries**

This model proposes only large, consolidated full-service libraries at Berkeley. Currently, we have many full-service libraries of various sizes. In this model, the number of libraries would need to be reduced to match available staffing. Closing some existing libraries would be done by a combination of consolidating collections on campus and increasing materials in storage.

**Type 1: Full-service Libraries**

All Full-service Libraries would be large, provide a full range of services and the management would be local to each library. They would offer a variety of individual and group study spaces. Collaboration, consultation, and presentation spaces would also be offered in one or more full-service libraries.

The team recommends the following service options within this model:

- **Hours**: Full-service libraries would have longer hours than many of our libraries today. Hours would also be more consistent across the libraries.
- **Circulation & Stack Management**: Circulation and stack management would be managed locally within each library. Fewer service points would make staffing more sustainable and reliable, as each location would have adequate staff to back-up people attending meetings, on vacation, out sick, etc. Standardization of loan periods, policies, and procedures would be beneficial and make user experiences more uniform and consistent. Billing questions would be centralized at the Privileges Desk.
- **Reserves**: Reserves would be processed and checked out within each library. Policies and procedures would be made more consistent across the libraries.
- **Access to Collections**: Libraries would be a mix of print-intensive and digital-intensive collections as determined by disciplinary needs. Print collections would be consolidated into a reduced footprint within the remaining full-service libraries. Decisions would be based on an holistic view of our collections, established metrics, and disciplinary differences.
- **Reference**: Reference services would be tiered and provided in all full-service libraries. Circulation and information desks would remain the front-line for directional questions, referring complex reference questions to reference desks, on-call reference staff, chat reference, research advisory services, and/or liaisons as appropriate. Online services (including chat reference, subject guides, FAQ, and

\(^5\) For more on modeling, see the section “Addressing the Charge,” page 5.
more) would be expanded and improved. Libraries may offer reference internship opportunities to local library school students.

- **Instruction:** Disciplinary teams of professional staff would be responsible for course-related and graduate instruction within or across full service libraries, targeting critical classes identified through environmental scans and ensuring a more even and equitable approach to instruction. Non-course specific instruction (e.g., ED 98 & 198 classes, L&S 1), undergraduate orientations, and instruction to Reading & Composition courses would continue to be provided by a central instruction unit, which would also be responsible for library-wide e-learning support, first-year experience outreach, and instruction coordination.

- **Web Services:** A central team would be responsible for designing and supporting a standard and consistent website template deployed across the libraries through a content management system such as Drupal. Each full-service library would be responsible for developing and maintaining the content of its library website (and associated subject pages) within this template.

- **Acquisitions:** Acquisitions functions are already mostly centralized and would remain mainly as they are. Serials check-in, English-language orders and receipts, management of approval plans, and other functions that do not require specialized expertise would be further centralized. Processing would continue in the full-service libraries, but with fewer libraries, this work would be more efficient and consistent.

- **Cataloging:** Cataloging functions are already mostly centralized and would remain mainly as they are. The management of cataloging units would be consolidated into Collections Services and Bancroft for more consistent application of Library standards and procedures; cataloging expertise in recorded and printed music, cartographic materials, and motion pictures would be supervised by or consolidated into Collections Services. Outsourcing, greater reliance on student employees, re-thinking levels of cataloging, and expanded collaboration with UC and other peer libraries would be explored.

Staffing within these libraries would consist of librarian managers and subject librarians; operations managers responsible for staff supervision, daily management, supplies, and facilities; evening/weekend circulation supervisors to supervise and train students; library professionals to support collection development, reference, instruction, and web services; library assistants for processing and stack management; and student library employees (see Appendix C for staffing details). Based on our estimates, using this model we could sustainably support Doe/Moffitt, Bancroft, and 6-7 additional consolidated full-service libraries depending on the scenario. This model would require 15-16 closures and consolidations across the 24 in-scope service locations.

The team recommends that these libraries be a combination of those based on subject affinities, special collections, and special formats, with campus geography a secondary consideration. Examples of subject-based groups include: Arts, Humanities, International & Area Studies, Life & Natural Sciences, Physical Sciences & Engineering, Social Sciences, and Applied Social Sciences.
Pros:
• Provides familiar and consistent services across all libraries.
• Allows more full-service libraries than other models – with more of them, people are more likely to have a full-service library nearby.
• Provides longer full-service hours in more locations than many disciplines receive now.
• Synergies from consolidation might benefit many whose studies are interdisciplinary – people may need to visit fewer libraries to get the material they need.
• People would have the convenience of deeper and broader expertise on hand.
• With fewer service points to staff, there would be more flexibility to develop new and enhanced services.
• Easier to supervise and manage than the other models.
• Offers a larger community for backup and support within each library.
• Even with more standardization, may allow customization for large disciplinary groups.
• Maximizes the use of off-campus storage while NRLF still has space for our materials.
• Frees up space for other departmental or campus uses while reducing our future campus recharge costs.

Cons:
• May require the most change to infrastructure and be the most expensive to implement (for both the one-time costs of capital improvements and collections consolidations).
• Fewer circulation points mean some people may have to travel farther to check out material.
• Results in less seating available for study space.
• Less shelf space would require a greater reduction in on-campus collections.
• May be perceived as diminishing contact and relationships with some academic departments.
• There may not be enough space for all the required staff in each library.
• Some current service points may not fit well into this model.

The Library would commit to explore new and enhanced services to mitigate these challenges.

Model 2: Hub-and-Cluster Libraries

This model assumes that there are several Hub libraries, each associated with a cluster of circulation-only libraries. Management of all libraries in each cluster would be centralized in the Hub.

Type 2A: Hub Library
A Hub Library is essentially the same as a consolidated full-service library (Type 1) but also has management responsibility for the other libraries in the cluster. All library services would be provided in the cluster – most would be centralized in the Hub; some might be distributed among the cluster. Clusters would be based on subject affinities. There would be a variety of individual study, group study, collaboration, consultation, and presentation spaces across the hubs and clusters.
**Type 2B: Circulation-only Library**

The circulation-only library would have a growing collection (print and digital), computers and printer/scanners, and would provide circulation, study spaces, and directional/information assistance. No other services would be provided at these locations. This library type would be part of a cluster, managed from a Hub library.

Service options are the same as Model 1 except for the following differences:

- **Hours:** Hub libraries would have longer hours than many of our libraries today. Circulation-only libraries would have reduced hours similar to our smaller libraries now.

- **Circulation & Stack Management:** Circulation and stack management would be managed from each hub library. Though there would still be a high number of circulation points, there would be sufficient staffing across the hub-and-cluster to provide reliable back-up. Loan periods, policies, and procedures would be either standardized library-wide or standardized across each cluster to allow for cross-training, back-up, and more uniform and consistent user experiences. Circulation policy questions would be referred to the circulation supervisor in the hub, and billing questions would be centralized at the Privileges Desk.

- **Reserves:** Intake of reserve materials and processing would be centralized within each hub. Reserves checkout would be centralized within each hub (for longer hours of access) or decentralized across the hub-and-cluster (for access closer to the department) depending on disciplinary preferences.

- **Reference:** Reference services would be tiered and provided in all hub libraries. Circulation and information desks in the hub and circulation-only libraries would remain the front-line for directional questions, referring complex reference questions to reference desks, on-call reference staff, chat reference, research advisory services, and/or liaisons at the hub as appropriate. Librarians could choose to schedule office hours or research advisory service appointments in circulation-only libraries.

- **Acquisitions:** Processing would continue in all the hub and circulation-only libraries, but would be managed and supervised from the hubs, therefore making the work more efficient and consistent.

Staffing within the hub libraries would be the same as within consolidated full-service libraries. There would be an additional circulation supervisor to supervise up to two circulation-only libraries. This supervisor would oversee library assistants and student employees assigned to processing and circulation in those circulation-only libraries (see Appendix C for staffing details). Careful thought must be given to how circulation supervisors in the hub library supervise their student employees at their circulation-only libraries. Based on our estimates, using this model we could sustainably support Doe/Moffitt, Bancroft, 3-5 additional hubs, and 4-10 circulation-only libraries depending on the scenario and number of hubs (the more hubs, the fewer circulation-only libraries). In addition, the number of circulation-only libraries would be limited by the size of cluster that one hub can reasonably manage. This model would require 9-13 closures and consolidations.
The team recommends that the hub-and-clusters be a combination of those based on subject affinities, special collections, and special formats, with campus geography a secondary consideration. Examples of subject-based groups include: Arts, Humanities, International & Area Studies, Life & Natural Sciences, Physical Sciences & Engineering, Social Sciences, and Applied Social Sciences.

**Pros:**
- People may not have to travel as far to checkout materials since there will be more circulation points.
- Retains more shelf space for print collections, lowering the probability that people would have to request print from storage.
- Retains more seating for study space.
- May be perceived as maintaining closer relationships with academic departments.
- Requires less physical change and would be less expensive to implement.

**Cons:**
- People may have to travel further for the full range of services as more circulation points mean fewer full-service locations.
- Seems harder for people to understand what to expect.
- More complicated to supervise and manage than full-service libraries.
- May require more standardization but be more difficult to standardize.
- Separates some subject librarians from their collections.
- More physical locations means higher future campus recharges.
- There are concerns that circulation-only libraries may not be sustainable and may not offer a future of excellent service.
- Growing demand from academic departments for central campus space might force future closures of circulation-only libraries.

The Library would commit to explore new and enhanced services to mitigate these challenges.

**Advice to Library Administration for the Transition and Implementation**

The team recognizes that it will take some time to fully convert our current service model to Model 1 and that the realities of implementation may make a full implementation impossible. However, we also believe that having Model 1 as our goal will provide Library Administration with a framework to make decisions early in the implementation process that will put us on the path toward Model 1. During the transition, we expect that aspects of Model 2 and other library types will prove useful in implementing our new service model smoothly and carefully. We recognize that there will likely be a mix of consolidated full-service libraries and a limited number of hub-and-cluster libraries in the short-term, based on factors such as discipline, collections space needs, study space needs, and campus geography. Certain functions or disciplinary groups may not have need for additional collections space or seating outside of their full-service library, while others may require a cluster of circulation-only libraries to meet their needs during the transition.
The team also discussed several optional services that might benefit users or help Library Administration mitigate challenges during the transition to our recommended model. Campus feedback and needs should drive decisions about these optional services, but it should also be noted that each has trade-offs. The cost of implementing an optional service would need to be covered by reducing the number of service points, reducing hours, and/or reducing other services.

**24/7 Study Space**

There is demand among undergraduate students for extended library hours for study space. The library has not been able to implement this within our current model, with the exception of 24/7 study space in Moffitt and Gardner Stacks during finals. In this optional service, those extended finals hours would be expanded to the entire academic year. Outside the regular full-service hours, some library space would be available to users with a Cal photo ID for individual and group study. Collections, circulation, and reference would not be available during these extended hours, but staffing would be present for security. We estimate this would cost $150,000 per year to implement.

**24/5 Study Space**

This optional service is the same as 24/7 study space except that extended hours would not be available on weekends. If extended study hours are implemented, the team recommends 24/5 study space over 24/7 study space because we believe it better reflects actual demand (as noted anecdotally and through Saturday gate counts). We estimate the cost for 24/5 study space as $100,000 per year.

**Electronic Reading Rooms**

Electronic Reading Rooms could be geared toward populations who mostly rely on electronic resources. They would have computers, wi-fi, and no print collection. This option would allow for placing a library location near departments, and help to meet continued campus demand for study space, with minimal requirements for staffing. This would be an additional library type within a cluster, managed from a Hub library.

Collections and office space could be converted into group study, collaboration and/or consultation space. Library assistants and/or student library employees would be required during all open hours to provide security and maintain workstations and printers. Staff in the hub would supervise them. In addition to the above, an Electronic Reading Room could be a pick up location for paged materials.

The team recommends that this optional service only be implemented at the request of departments or campus administration, wishing to mitigate the impact of library closures, perhaps only with financial support. We estimate the cost of an electronic reading room staffed with student library employees would be approximately $50,000 per year.
On-Campus Collection Storage with Paging

On-campus collection storage would house print collections for on-campus paging. Existence of on-campus collection storage could be short-term as part of the transition, allowing us to close libraries but continue to provide access as we gradually move parts of the collection into full-service libraries or the NRLF. On-campus collection storage could also serve a long-term need for quick paging of medium use collections, especially as NRLF and SRLF run out of space.

Staffing would be needed for paging and stack maintenance, but this would happen on a roving basis from a centralized team in Doe/Moffitt Circulation or Interlibrary Services. We estimate this would cost $4,000 per location per year. The total cost would depend on the number of on-campus storage facilities, the number of runs per day, the number of days per week, and similar factors.

As Library Administration works on the transition and implementation planning, the team recommends that they take into account these considerations:

- Articulate the phases and timeline for implementation as early as possible to ease concerns among library staff and campus constituents.
- Be prepared to provide background information, statistics, and context in reply to campus questions about needs and impact (e.g., percent of collections that have never circulated in response to questions about reducing collections).
- Limit the influence of historical relationships, politics, and funding that do not add substantively to long-term sustainability in order to ensure the best and strongest decisions are made for the future of the library.
- Maintain flexibility in applying the model to existing functions and service points as appropriate to meet different disciplinary needs.
- Use circulation-only libraries, electronic reading rooms, and on-campus collections storage as necessary to make sure that study and shelf space needs are addressed during the transition.
- Allow disciplinary groups to retain more shelf space, print collections, and study space within clusters when necessary while also allowing more consolidation and reliance on electronic resources where beneficial.
- Consider all options for the role of Moffitt in the recommended service model, understanding that any use must remain true to the renovation planning vision.
- Take into account existing use and workload information when creating disciplinary groups, deciding consolidations, and distributing staff – strive for sustainable workloads and balance across full-service libraries and/or clusters.
- What legal and contractual obligations must be considered when making decisions about these changes?
- Determine statistics that will have value for ongoing assessment and focus on collecting those and the required UCOP/ARL statistics only.

All library staff will be impacted by these changes -- job responsibilities will change, work will be done differently, and new positions will be created. Staffing will be more sustainable and equitable across the libraries. The team recommends that Library Administration take these actions to assist library staff with the transition:
• Continue to emphasize that we are not planning for layoffs.
• Acknowledge that we have smart, dedicated, and hard-working staff who have already made significant contributions to this process.
• Ask staff to also contribute their expertise to the implementation planning – working groups can help develop detailed plans, standardize policies and procedures, and explore specific ideas to improve operations that were captured in our overview documents.
• Remind staff that a new model will mean new opportunities for how staff jobs are conceived.
• Make sure that recruitments and reassignments are open, fair, and inclusive.
• Provide training to help staff prepare for the new responsibilities, positions, and career paths available in our new service model.

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6 Library Service Models Self-Study Team Overviews. April 18, 2012
http://www.lib.berkeley.edu/UCOnly/LSM Overviews 4-18-12.pdf
Appendix A: Charges to the Self-Study Teams

**Overall Context**

The Library today has, on average, four people in career positions to accomplish the mission carried on by five people only a few years ago. Yet we are maintaining the same number of libraries and service points that we had when we were staffed at that higher level. One reason we have tried to do so much is that the campus has retained all of its academic and professional programs, adding rather than subtracting to meet the growth of new knowledge.

This approach has taken a toll -- staff across the Library say they are overwhelmed and have to let some work slip. It is clear that the Library can no longer provide the full range of services in as many locations, as we have historically provided. Many locations are already below skeleton staffing levels and absences (such as illness or jury duty) mean that the unit is no longer able to maintain current hours, train and supervise student employees, assist users with reference questions, check-in and process new materials, review library collections, support new services, or handle special requests. Nor can library staff take the important role they must have in the transformation of scholarly communication and teaching in the academy. It is clear that continuing to stretch our reduced workforce and provide all services as we have is untenable.

The Re-envisioning initiative allows us to develop our priorities and approaches for the long-term health of the Library. Today’s challenge is to articulate the types of services the Library should provide, and where they should be provided, to meet current and anticipated needs of our library users. We must identify services (or aspects of services) that we might standardize, automate, centralize, or cease in order to allow us to focus on activities of greatest value, and identify services (or aspects of services) that we should give preference to and grow. Equally important in this process is outlining a model for an ideal workplace for staff – one where responsibilities are assigned at an appropriate classification, the workload is reasonable, and the environment supports personal growth, librarywide collaboration, and continuous improvement. Difficult choices must be made.

**Team I -- Library Service Models**

**Context**

The Library’s current service model is a hybrid with some academic departments and programs served by subject specialty libraries and others served by the Doe/Moffitt Libraries. Historically each library has developed their policies and services autonomously. With decreased staffing, it is likely that the Library will need to weigh the options for supporting more libraries with fewer and/or lower-level services, or shifting resources from some areas to sustain current-level and/or enhanced services in fewer locations. This forward-looking assessment will need to take into account other changes in our environment. Signs of these changing times include: NRLF estimated to be full in three years, some disciplines moving more quickly toward e-resources, interdisciplinary relationships between departments and disciplines, demand for 24-hour study spaces, calls for more just-in-time services, campus changes in light of Operational Excellence (OE) and related initiatives, and internal operational costs of locally customized services.

*What is needed is a new landscape for library services, one that we can all share comfortably.* The recommended model for this new order must be viable within the Library’s
reduced operations budget. This task will be especially challenging since it may not be possible to gather all data that we may wish to have.

**Charge**

For all services provided in more than one place by Doe/Moffitt, Bancroft, EAL, Collections Services, and the Subject Specialty Libraries:

1. Describe options for viable service configurations that will provide the new framework for the number of library locations supported by the University Library, and for the services offered in each library location. These service configurations will be described as models, such as a “full service library” (a staffed location with the greatest range of services and longest hours), a “storage library” (from which materials would be paged), and all practical options in between. Centralizing services (e.g. reserves, cataloging, print serials, etc) should also be explored within these models.

2. Identify the associated staffing levels, costs, benefits and drawbacks of each model, given its service configuration.

3. Identify metrics and other considerations (such as disciplinary alliances) that would assist in determining which model would be best applied to existing library locations.

4. Recommend a sustainable framework for library services (which will include one model, or a combination of models) for each of three budget scenarios. These scenarios will be provided to your team with relevant data.

5. Document any special issues or considerations that might assist both users and library staff with the transition, beginning in 2012 and over 2-5 years, from the current service model to the implemented model.

To clarify, the team is asked to identify a viable service framework(s) which take into account the number of library locations and services each can support. As part of this process, the team may articulate criteria they used in their decision making. The team is not asked to identify specific plans for individual libraries.

**Team II -- Role of the Librarian**

**Context**

The Library has developed ties with academic departments and programs which are sustained primarily by library liaisons. Librarians and other professional staff serve in these roles with responsibilities for collection development, instructional services, reference and research consultations, and other outreach activities. The Library must take a new look at the way we support all disciplines.

In addition to the liaison assignments, many librarians are managers who spend a significant amount of time handling operations and supervising staff. As the campus adjusts to the OE Organizational Simplification guidelines, the Library is wise to consider how librarians, and by extension other professional staff, can be best utilized as supervisors, managers, and leaders. Additionally, along with historical areas of value (such as preservation, acquisitions, and
cataloging), new issues are emerging that might be best served by an individual or group of library staff with appropriate expertise (e-research, GIS, online instruction, and assessment, for example).

As we operate the library with fewer staff, including librarians, a key question becomes what is the role of the librarian in a re-envisioned library? What are the most important responsibilities that must be filled by librarians? What tasks can be reduced, redesigned or transferred to other staff? In this review the self-study team will develop recommendations to assist the Library in determining priorities for librarian positions and allocations of their time to guide us as we plan.

**Charge:**

1. **Inventory current and potentially new responsibilities for librarians at the UC Berkeley Library** (selection, liaison, reference, original cataloging, instruction, management/supervision, and administration, for example.)

2. For each of these responsibilities, investigate and document approaches for providing them in new or reduced ways (including potential benefits and drawbacks when possible)

3. Our current workforce is 80 FTE librarians—69 career & 11 temporary. Recommend how responsibilities should be assigned in scenarios with a librarian workforce at lower levels (numbers forthcoming).

It is important to understand that the work of this team is not a theoretical exercise, but will have consequences on how the library operates. For example, if it is found that all the current librarian responsibilities must be retained at their currently reduced levels, it is reasonable to conclude that these would have to be applied over fewer service points and broader subject areas to be sustainable.

I also call to your attention to The NextGen LAUC Member: A Report from the LAUC Committee on Professional Governance as an important resource.

**Working Life of both Teams:**

The teams will meet, separately, every week. Library Administration representatives on the teams will serve as a bridge between the two self-study teams. Library Human Resources Department (LHRD) and Library Business Services (LBS) will be providing key data as requested, making Susan Wong and Elise Woods Consultants.

Final reports with recommendations should be submitted to the University Librarian no later than April 15, 2012. Both reports from the teams will be released for review and comment by the full range of our community—faculty, graduate students, undergraduates, library staff and the campus academic administration. At the end of the review process, the University Librarian will issue an “Outcome Letter” that delineates new priorities, the service models, and articulations of the role of Librarians. The Letter will have associated “action items” for the Library to implement.

Tom Leonard

Jan. 10, 2012
Appendix B: Current Library Service Points

The University Library

In Scope

1. Anthropology
2. Art History/Classics
3. The Bancroft (including Magnes)
4. Bioscience & Natural Resources
5. Business
6. Chemistry & Chemical Engineering
7. Data Lab
8. Doe/Moffitt (including Circulation & Privileges, Stack Management, Reference & Instruction)
9. East Asian Library
10. Earth Sciences & Map
11. Education/Psychology
12. Engineering
13. Environmental Design
14. Graduate Services
15. Mathematics/Statistics
16. Morrison
17. Media Resources Center
18. Music
19. Newspapers/Microforms
20. Optometry
21. Physics/Astronomy
22. Public Health
23. Social Welfare
24. South/Southeast Asia

Out of scope (already maximally centralized and/or under Operational Excellence review)
1. Budget, Business, Building Management & Facilities, and Design
2. Graphics
3. Human Resources
4. Interlibrary Services
5. Preservation
6. Systems Office

Affiliated Libraries (out of scope)
1. CED Visual Resources Center
2. Environmental Design Archives
3. Ethnic Studies
4. Giannini Foundation of Agricultural Economics
5. Institute for Research on Labor and Employment
6. Institute of Governmental Studies
7. Institute of Transportation Studies
8. Law
9. Pacific Earthquake Engineering Research Center
## Appendix C: Non-Librarian Staffing for Different Types of Libraries

### Type 1 - Consolidated Hub

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<th>Staff Salary</th>
<th>FTE</th>
<th>Position</th>
<th>Notes</th>
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<tr>
<td>$ 49,339</td>
<td>1.00</td>
<td>Library Supervisor 2</td>
<td>Operations Manager/Daytime Circulation Supervisor -- Supervises all career staff in unit, daily management, purchases, training, workflow, statistics</td>
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<tr>
<td>$ 41,305</td>
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<td>Circulation Supervisor (Evening/Weekend)/Stack Management Supervises/manages/schedules all student employees</td>
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<td>Library Professional 4</td>
<td>Reference, Web work &amp; Instruction (place holder)</td>
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<td></td>
<td>1.00</td>
<td>Library Asst IV</td>
<td>Reference &amp; Web work (place holder)</td>
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<td>Library Asst III</td>
<td>Stack Management/Reserves/Processing</td>
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<th>GA Cost</th>
<th>Open Hours</th>
<th>GA</th>
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<tr>
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<td>73.00</td>
<td>GA @ $12.90/Open Hour</td>
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| $ 279,664    | Hub 1a TOTAL |

### Type 2a - Hub with Cluster (add to type 1)

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<tr>
<td>$ 279,664</td>
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<td>Cost of 1a hub</td>
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<td>$ 320,969</td>
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### Type 2b - Circ Only Library

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</thead>
<tbody>
<tr>
<td>$ 39,382</td>
<td>1.00</td>
<td>Library Asst III</td>
<td>Processing/Stack Management/Circ Backup</td>
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<table>
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| $ 71,568    | Type 2 - Circ Only TOTAL |

### Type 2c - Electronic Reading Room

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<td>$ 48,950</td>
<td>73.00</td>
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| $ 48,950    | Hub 1a TOTAL |