

## FY23 Budget Reconfiguration Process + Principles

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### Goal

Affirm FY23 budget reconfiguration, achieving three financial target(s).

### Process

All Cabinet members will participate in identifying feasible service changes. There are two strategies to identify service changes to reach Library's FY 23 financial targets. In both cases, Cabinet will focus on the principles proposed as Cabinet considers specific [service areas](#). Cabinet will be using *both* strategies (not either-or).

Strategy A: Cabinet members think broadly about the whole Library organization and suggest ideas across any of the service areas.

Strategy B: Cabinet members think about their own portfolio and suggest ideas that represent a percentage of their annual expenditures (such as 10%, tbd).

Cabinet members will review and discuss all suggested ideas as a group to agree on the final slate of service changes to implement in the case of the three financial targets.

While this process focuses on service reductions to be implemented in FY23 in order to reach the budget reduction, Library leadership will also frame our messaging to promote the services that Library is prioritizing and sustaining. Communications should continue to remind everyone that a strategic planning process focused on the longer horizon (5-7 years) is also commencing; that planning includes iterative processes, input from various stakeholders, and a final plan by summer 2023.

### Communication and transparency

Throughout this process the the Library will:

- Gather relevant data and feedback to inform future decisions and support continuous improvement.
- Communicate clearly to Library staff at each stage of our process of planning, providing as much information as possible without increasing uncertainty and anxiety. Focus on sharing our thought process, principles, and general ideas until the point we are confident about dates. Work closely with Roundtable managers and expect them to work with their staff on communications, feedback, and deliverables.
- Communicate clearly to campus, faculty, students, and other stakeholders about our plans, the services we can provide, and our rationale for the choices we have made. Provide avenues for ongoing feedback and conversation with the Berkeley campus community to understand their needs as they arise and evolve.

## Organizational commitments

Once decisions about the budget reconfiguration are confirmed, the Library will begin implementation.

Workforce commitments: The Library's goal is to maintain employment security for all current Library employees. As our organization evolves, however, roles and positions may be realigned toward new service priorities and activities. The Library will share with all employees the Library's position opportunities and responsibilities for work that is continuing. As employees adopt new roles or take on new positions, the Library is committed to providing professional development and training for them to grow and succeed.

Process commitments: Plans will be shared with Library staff with opportunities for them to provide input and influence outcomes. Decisions about budget reconfiguration have to be made by Fall 2022 hence the decisions outlined will be implemented in the short term but will be assessed, adapted, and iterated for the scope of the long term strategic process.

## Guiding principles

The FY23 budget reconfiguration process encompasses all Library activities and all Library units. Decisions about FY23 services, operations, workflows, and staffing will consider all six of these principles:

1. *User experience:* Prioritize services provided to UCB faculty and students, guided by the needs and preferences they identify.
2. *Resilience:* Prioritize service models that effectively match the university's strategy for instruction, research, and work (e.g. curricular changes, emergencies, flexible work agreements).
3. *Sustainability:* Design services to meet clearly defined expectations for scope within fiscal and staffing capacity.
4. *Interdependence:* Take into account the impact on, work for, and relationships with other Library units.
5. *Impactful performance:* Adopt approaches that enable staff to reduce duplicative activities; coordinate and streamline processes; and focus their expertise and energy on the most meaningful work for the organization.
6. *Staff well-being:* Align services with appropriate staffing. Actively engage employees who will be directly impacted by organizational changes to understand and address employee needs in order to make humane and successful transitions.

For Library Staff