

CARLI Strategic Planning Focus Groups

Final Report

Prepared on behalf of
The Consortium of Academic and Research Libraries in Illinois



Graduate School of Library and Information Science
313 Library and Information Science Building, MC-493
501 East Daniel Street
Champaign, IL 61820
217.333.1980
<http://lrc.lis.uiuc.edu/>

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EXECUTIVE SUMMARY

Seven focus group sessions were held to assist the Consortium of Academic and Research Libraries in Illinois in making strategic planning decisions. Four sessions were held with respondents from member libraries, two with CARLI staff, and one with CARLI managers between April 20 and May 3, 2007.

The Future of Academic Libraries

- The move towards more electronic resources is unanimous among members, staff and managers as a change academic libraries are currently facing. Budget cuts and space considerations are influencing these decisions along with student and faculty needs. Rights management and electronic resource management systems will be areas of focus.
- Members also report a tension between fulfilling the libraries' academic mission to students and faculty and the need to bring in more people into the library. Many member institutions are implementing information commons or developing programming and/or collections that are more popular in nature. Members must constantly justify their relevancy to administrators, a situation recognized by CARLI managers.
- Challenges member libraries will face in the near future include staffing and budget cuts, staying on top of new technologies, managing student/faculty expectations and staying relevant to their needs, and maintaining or updating the library's physical space.

CARLI's Products and Services

- Development of an enterprise or faceted search engine is something CARLI should investigate according to member, staff, and manager session participants.
- Many respondents feel the OPAC needs to be updated, and Voyager was heavily criticized in all the member sessions. Open source software was raised at two member sessions and both staff sessions.
- Managers feel that CARLI could easily undertake more responsibility in brokering databases, something that members, particularly at smaller institutions, think is important for CARLI to continue.
- According to members, I-Share needs to be improved before it is expanded. Uniformity across institutions' policies will relieve some of the burdens libraries face. Managers say there is some potential here but it depends "how broad people want to take that vision."
- Members were interested in the development of a consortium-wide repository housing print backfiles, with the potential to electronically delivery items. Similarly, some members expressed interest in more cooperative collection development with electronic resources.

Shaping CARLI's Future

- There is no firm consensus among members, staff, and managers about how CARLI should calculate membership assessments except that it should be as fair as possible.
- Staff and managers anticipated the majority of complaints CARLI members had with training, going so far as to purchase a Web delivery system. CARLI staff will need time to learn the new system and ways to present information in that format. In the meantime, members stress the need of having multiple training sessions across the state and CARLI making training materials more accessible and, in some cases, understandable.
- Members at each session either directly or indirectly wanted CARLI to serve as a membership clearinghouse or develop a mentoring system to foster communication and collaboration between member institutions.
- Major concerns members have about working with CARLI include current communication efforts, whether or not CARLI can successfully meet a variety of institutions' needs, and if the level of CARLI staff is sufficient to handle new initiatives and members. These concerns were echoed in the staff and manager sessions.
- CARLI's technology products and services receive the most complaints from members. It is increasingly a point of frustration for smaller libraries that do not have the staff to support such efforts and larger institutions that are being held back.

The CARLI Organization

- The vast majority of staff and managers feel a shared space will assist the organization with internal communication and foster organizational culture.
- The majority of points raised by members were reiterated in staff and especially manager sessions about how to meet members' needs. However, there was always ambiguity about how to go about addressing the issues because managers do not feel authorized to take control away from the CARLI Board or member institutions.
- CARLI staff are overcommitted and must contend with communication barriers that still exist within the organization thanks to past mergers. Communication and information sharing between the data services, user services, and technical services needs to be improved.

CONCLUSIONS AND RECOMMENDATIONS

CARLI staff and managers anticipated many of the issues members raised in the focus groups. Staff and managers are aware of many of the pressures academic libraries are facing and how the move to more digital resources is changing library collections and services. The problems members cited with CARLI training were also recognized by staff and managers, and the ways CARLI might alleviate those concerns are already in the planning stages.

What was perhaps most interesting was the silence or lack of deep responses from both members and managers about what products, services, or initiatives CARLI should be doing immediately. When members were asked this question, they were either unsure or their responses reflected the local needs of their institution, not things that would necessarily relate to the consortium as a whole. In the manager session, it seemed that they held back, evidently because they see their role as letting users drive new initiatives and priorities. They see their primary responsibility to be responsive to the needs members bring to their attention. This situation suggests that members are looking to CARLI for leadership, but the CARLI staff does not feel it is necessarily their place to provide it. They are not unwilling to provide direction, as the focus group comments demonstrate, but they do not feel they are authorized to.

In this time of rapid technological change, where some institutions have raised questions about the relevancy of library services, member institutions are looking for not only more leadership from CARLI but also want CARLI to react more quickly to their changing needs. In order to respond, the CARLI Board of Directors should consider having the staff take up a greater role in directing the organization's priorities. This focus group report will help the Board and CARLI staff to articulate a set of priorities for near-term implementation and a set of goals to be working towards for the future. To carry these out, it will be vital for Board and staff to build as effective a working relationship as possible. Not only does the staff have the expertise and understanding of user needs, but they are also aware of what CARLI can provide to meet those needs effectively. As staff members reported, they are often brought in when it is too late for them to suggest alternative solutions to make initiatives more sustainable and scalable, significant

problems that members are running into now with Voyager and other CARLI products. The organization's future will depend on the Board setting clear goals for CARLI, allowing more opportunity for staff input, and authorizing the staff more flexibility in deciding the boundaries of their work and responsibilities.

Internal communication needs to continue to be an area of focus. The merger of the several organizations has brought the types of challenges all such mergers bring. The fact that the CARLI organization is housed in different locations – including the individuals who work from remote sites – complicates communication and work. Employees cited the weekly internal emails as having the information about the organization they desired, but they “still need to read it” in order to benefit from it. Because the staff feel they are too busy even to “cross-train,” it may be difficult to find the time across the organization to foster camaraderie and erase the organizational artifacts remaining from the AITS, ILCISO, IDAL, and ICCMP mergers. As one manager commented,

[W]hen the merger happened, functionally, people's jobs didn't change much. How we talked about things and the product names might have changed. How things came together might have changed. Functionally, people's jobs didn't change much and so I don't know if that's a good thing or a bad thing.

CARLI will also need to disentangle many of the issues raised by staff members with regards to information sharing, communication, and the technology troubleshooting process across the data services, user services, and technology services departments. While this was not an area emphasized in the focus group guide, the number of comments in this particular area suggest it is a significant problem and needs to be addressed.

General communication with members is a source of concern as well. Staff members expressed disappointment because when they “look at the actual activity on the listservs or the amount of traffic coming in on the suggestion forums and suggested products,” the level of use is not as high as expected. A few members were also concerned at the traffic on listservs and asked for greater involvement with other CARLI institutions, as opposed to always going to CARLI. In one session, they discussed the possibility of mentoring among institutional members. At another, respondents thought

CARLI should create a membership clearinghouse. In addition to linking CARLI institutions together more effectively, and fostering communication between members, respondents also want CARLI to provide more effective training materials, especially cheat sheets, best practices, and implementation guides. Making training handouts and presentations more visible on the Web site is another area mentioned by participants. Changes to the provision of training and sharing of information will also alleviate many of members' concerns, especially among the smaller institutions. Similarly, CARLI needs to demonstrate to larger institutions that their technology products and services are a benefit to them, not a hindrance, and extra care should go towards ensuring scalability in future endeavors.

Members appreciate and support CARLI, but the pressures facing member institutions and the library field in general, especially when it comes to library budgets and technology, require more action from the organization. One respondent stated in the Chicago session that CARLI is "being overwhelmed, and it's not as helpful as it once was. That's how it's losing its uniqueness. It's totally overwhelmed." Fortunately, CARLI staff appear to be devoted to their work and talked about wanting to see the best for their member libraries. As one staff person commented, "It's a fundamentally an ethical place to work. What we're doing is aiding and supporting resource sharing, which is something you can get out of bed feeling proud of." CARLI's strategic planning efforts will help the organization identify initiatives they should focus on and decide how to best harness the staff's expertise and members' suggestions in these areas. The responses from the focus groups provide many insights into members' views and the CARLI's organization as a whole, and they are a valuable resource as CARLI prepares for the future.