The University of Hong Kong Libraries

The 13th Annual Library Leadership Institute

Leading the Next Generation Research Library
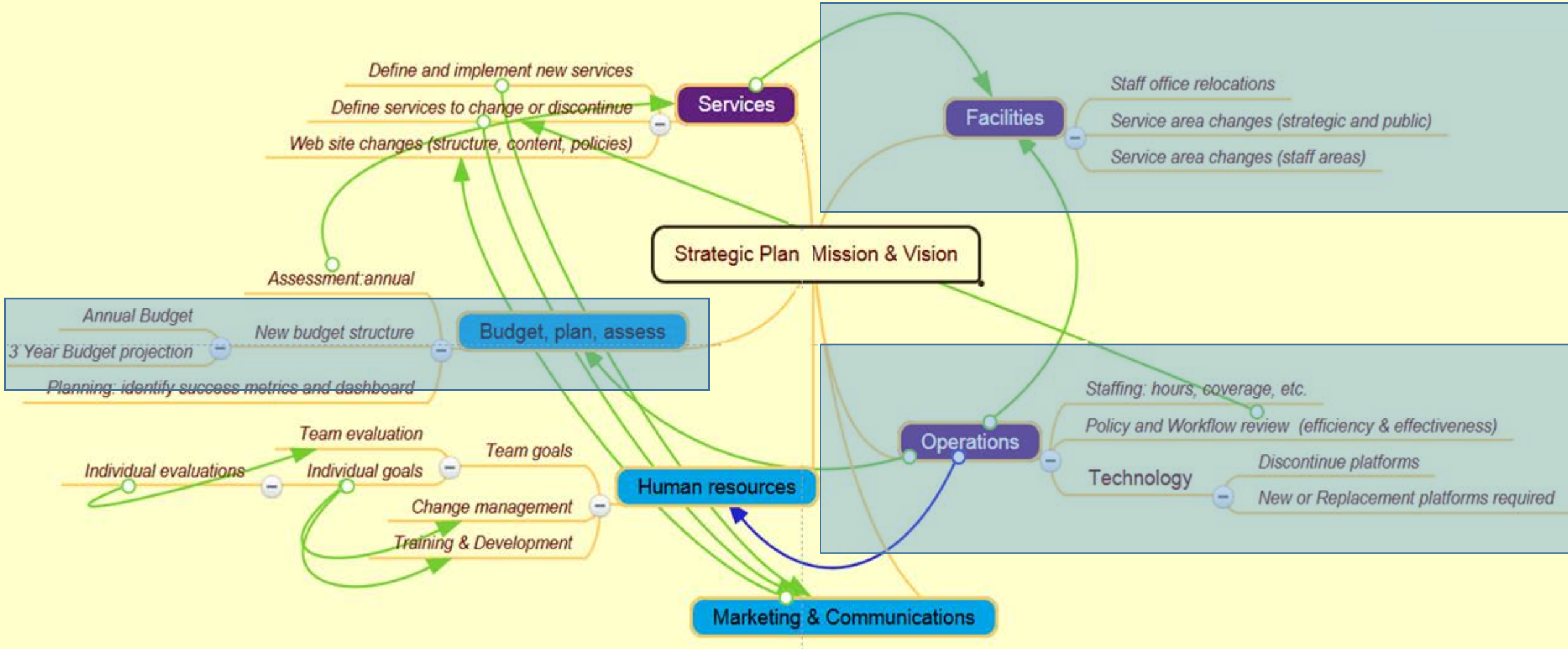
Xiamen, China | 24-28 April 2015

Session 5:

Aligning Plans, Resources and Operations

Note: the slides appearing in the version of this presentation may differ from the actual slides used during the Institute

session 5: aligning strategic resources and operations: budget and facilities

achieving strategic change: resources & operations

Define and implement new services
Define services to change or discontinue
Web site changes (structure, content, policies)
Services

Facilities
Staff office relocations
Service area changes (strategic and public)
Service area changes (staff areas)

Strategic Plan Mission & Vision

Assessment: annual

Annual Budget
New budget structure
Budget, plan, assess
3 Year Budget projection
Planning: identify success metrics and dashboard

Staffing: hours, coverage, etc.
Policy and Workflow review (efficiency & effectiveness)
Operations
Technology
Discontinue platforms
New or Replacement platforms required

Team evaluation
Individual evaluations
Individual goals
Team goals
Human resources
Change management
Training & Development

Marketing & Communications

success = good ideas + great people + discipline

think about our business in new ways …

what if a book as we no it were no longer a book?

would the library no longer be a library?

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Brian Dettmer (Ted Talk)

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> *"Good management is about making choices.*
>
> *A decision __not__ to do something should be analyzed as closely as a decision to __do__ something."*
>
> – Andrew Likierman
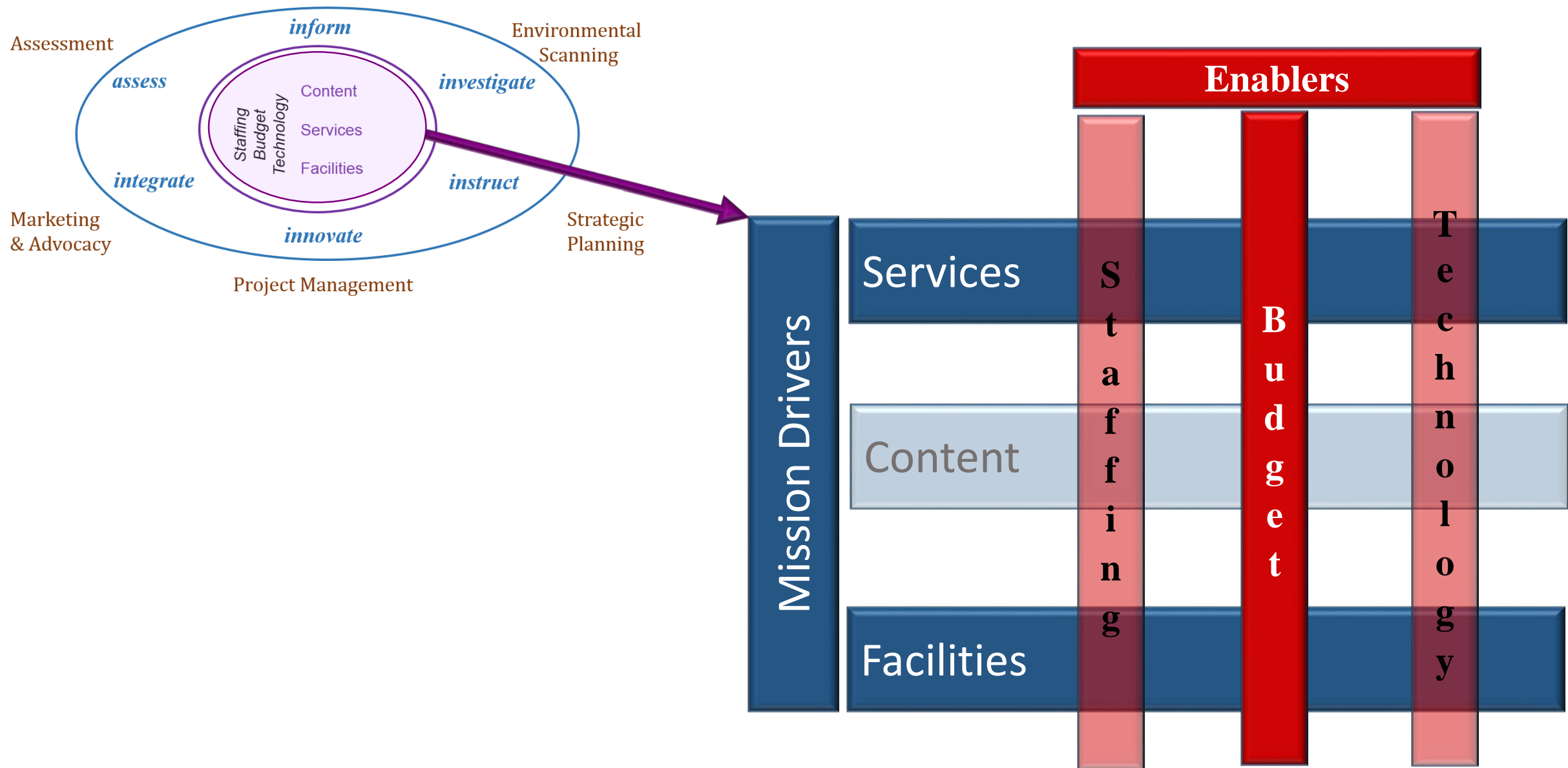
strategic budgeting

- Align budget and strategic goals to achieve high user satisfaction
- Maximize investment and minimize risk
- Balance value, cost, and fiscal capacity to ensure success of high quality, most-valued services
- Invest in goals with the highest impact
  - eliminate operational inefficiencies and redundancies
  - reallocate existing resources (reallocate)
  - create persuasive case for new funds (internal or external)
  - identify potential partners for new investment
  - fund experiments and demonstration projects
  - establish cost controls for the future

strategic budgeting: desired results

- Align budget and strategic goals
- Retain valued high-quality services
- Eliminate operational inefficiencies and redundancies
- Balance resource allocations for needed services
- Create a budget "buffer for excellence"
- Generate partnerships with other service providers
- Forestall unintended consequences
- Achieve high user satisfaction
- Establish cost controls for the future
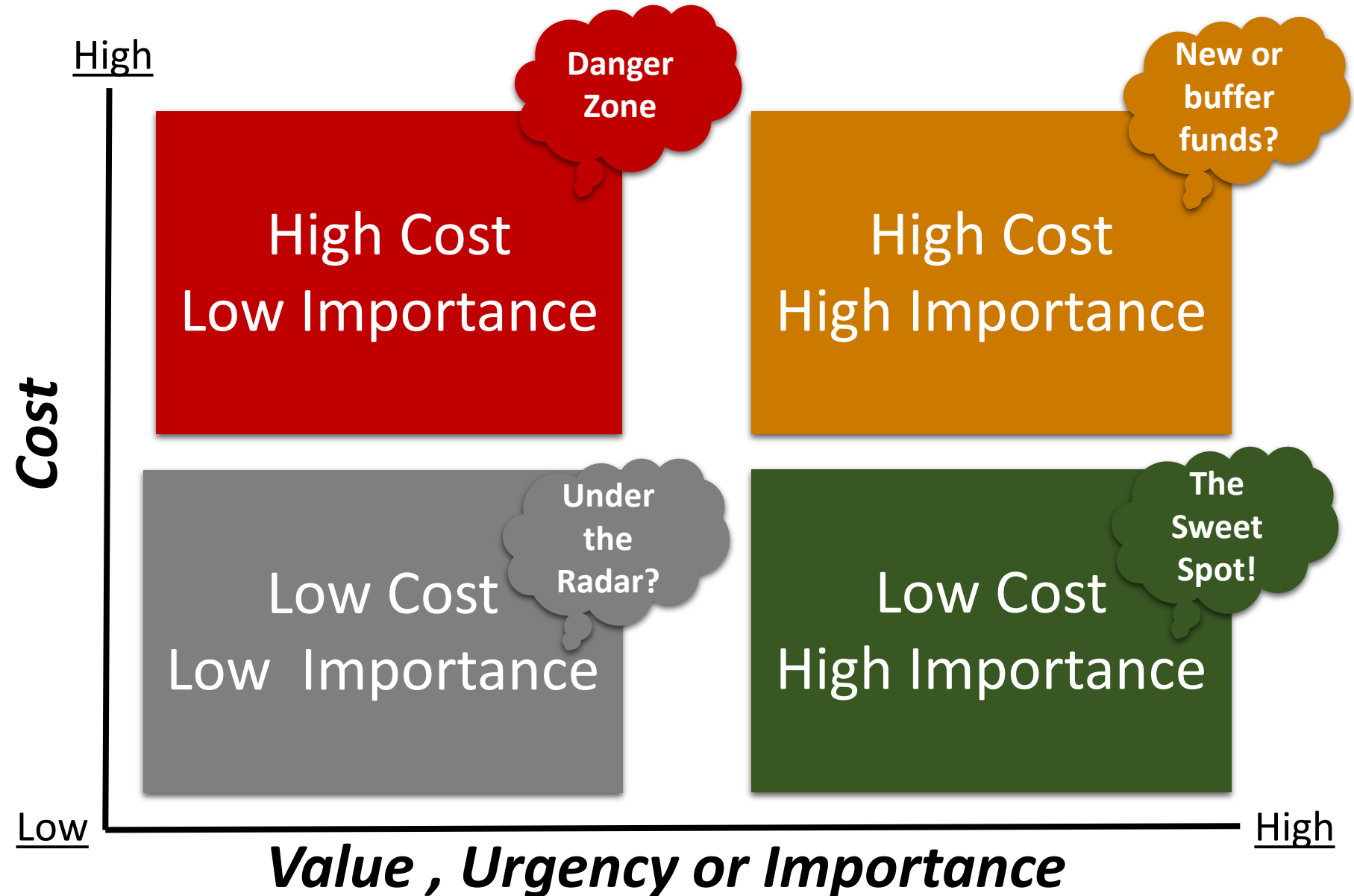
weighing value and cost

"A cynic is a man who knows the price of everything but the value of nothing."
– Oscar Wilde

"A romantic knows the value of everything and lets others worry about how to pay for it."
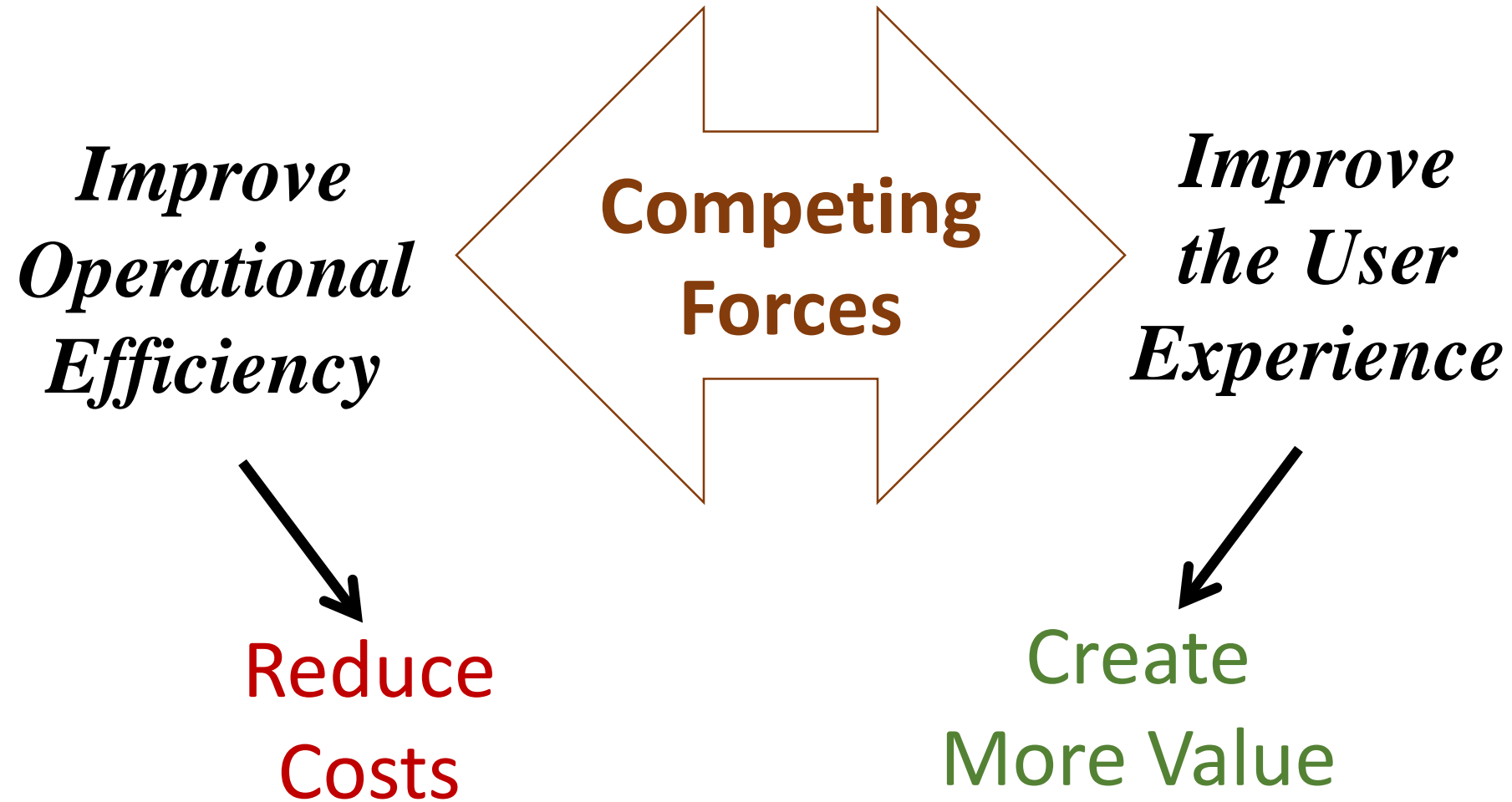
Value:
"to consider with respect to worth, excellence, usefulness, or importance."
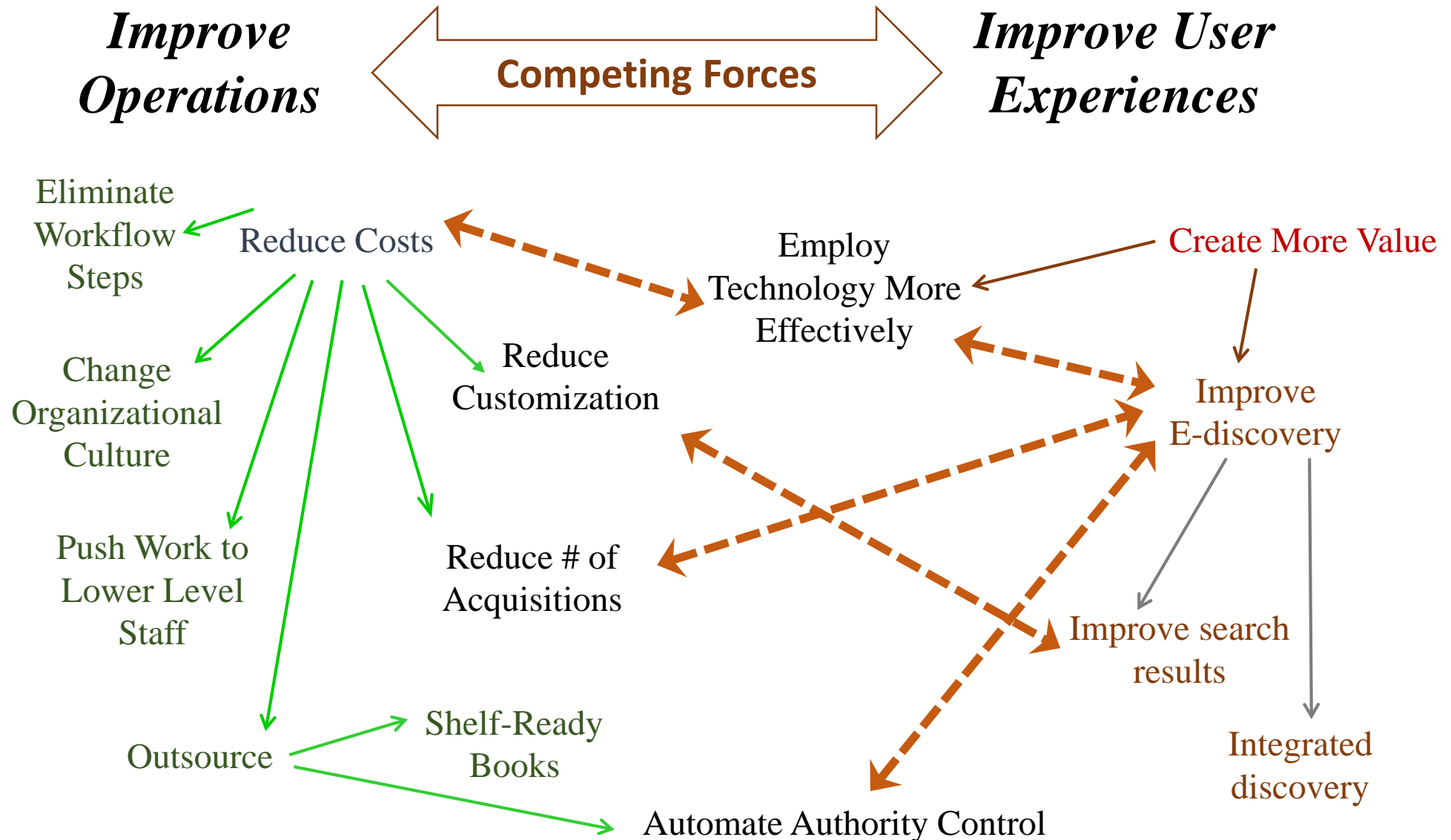
identifying "mission critical" services

- Does it promote the innovative approaches to learning?
- Does it advance learning, research and building new knowledge?
- Does it enable students to be successful, ethical information seekers?
- Does it facilitate discovery of valuable information?
- Does it provide a welcoming space for collaboration?

competing forces of strategic budgeting

Improve Operational Efficiency

Competing Forces

Improve the User Experience

Reduce Costs

Create More Value

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example: choosing among competing forces – a mindmap

Improve Operations ← **Competing Forces** → **Improve User Experiences**

- Eliminate Workflow Steps
- Reduce Costs
  - Change Organizational Culture
  - Push Work to Lower Level Staff
  - Reduce Customization
  - Reduce # of Acquisitions
  - Outsource
    - Shelf-Ready Books
    - Automate Authority Control
- Employ Technology More Effectively
- Create More Value
- Improve E-discovery
- Improve search results
- Integrated discovery

facilities
design principles for 21ˢᵗ century environments

the challenge

create an inviting and technology-enabled university commons, a campus destination that serves as the information laboratory for learning and knowledge collection, connection, creation, and curation

facilities: changes drivers

Scholarship (Learning & Research)
from analog to digital
from confined to expansive
from proprietary to open
from individual to collaborative and massive

Service Delivery:
from fixed to mobile

Technology
from limited to unlimited
from the Internet of Ideas to the Internet of Everything
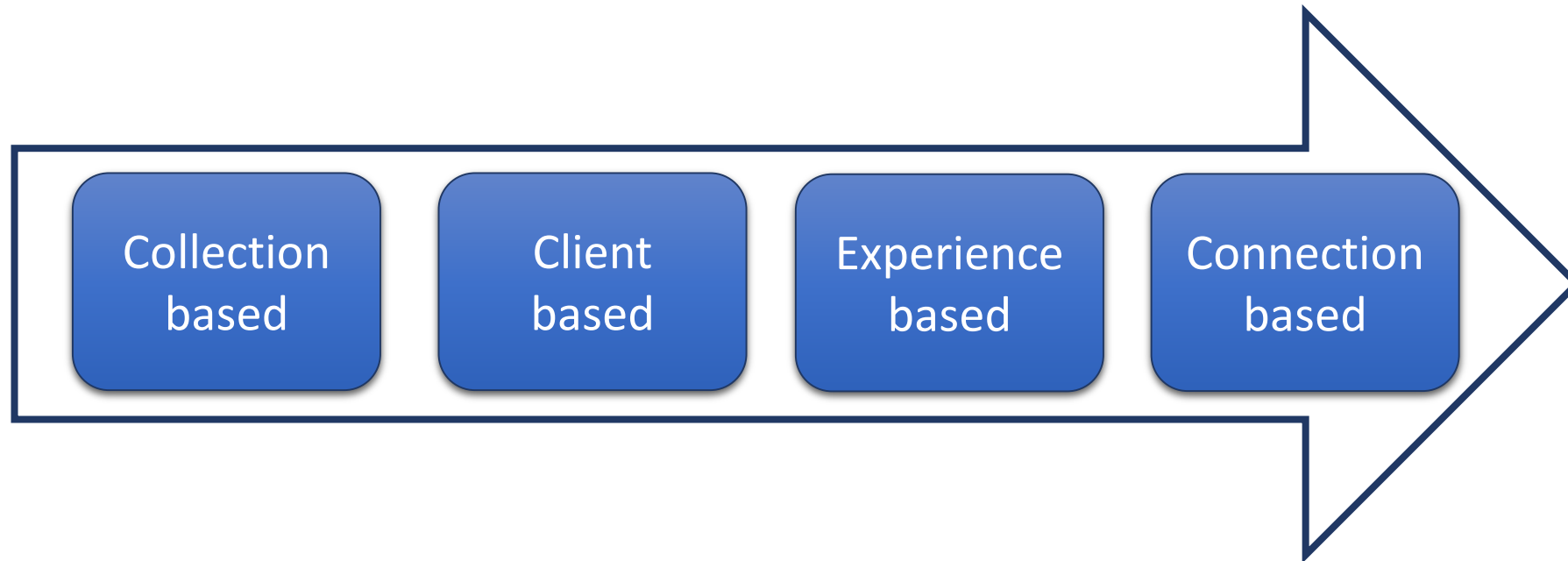
Information
from confined to open and boundless

Discovery
from closed to comprehensive
from complicated to easy

the evolution of the library as place

Collection based → Client based → Experience based → Connection based

old library design paradigms

grand architectural statements
- Built "for the ages"
- Heavy furniture fixed-in-place
- Soaring ceilings, atria and staircases
- Polished woods and dramatic lighting

inflexible form and limited functionality
- The battle between stacks and seats
- Inhospitable to technology changes
- Slab floors with uniform load bearing

bad designs:
overbearing architecture
& communication barriers

new design objectives

- Design for the transition, not for tomorrow
  - E.g., experiential and virtual learning

- Incorporate multiple spaces for different types of users, e.g.,
  - Faculty (research support)
  - Graduate students (quiet and social spaces, secure, comfortable, inviting)
  - Undergraduate students (collaboration spaces)

- Experiment before investing heavily

new design objectives

- Don't design "for" specific technologies; naturally embed it everywhere
  - Incorporate a multi-year tech planning cycle
  - Accept that the technology you design for today will be obsolete by the time the building or space opens

- Create flexible *and adaptive* designs that can evolve naturally
  - Each new class of students brings different technology experiences and expectations

- No "architectural statements"
  - Design for mobility
  - Provide a combination of open & enclosed spaces
  - Natural light
  - Use service, not big fixed-station furniture
  - Include some space for books!

- Be ready to embrace your mistakes, and make it easy to correct them

new design analogy
the "library as airport" – a multiplicity of spaces

- Active service space [airport ticket counters]
  - Major service areas (e.g., main service station)
  - Useful for quick transactions

- Transitional space [airline waiting areas]
  - Places to work or gather before and after class
  - Wireless access, outlets, furniture to support learning

- Blended social spaces [shopping and restaurants]
  - e.g., library cafes, to mix eating, relaxing and study
  - Blend open and collaborative group study spaces

- Quiet sanctuaries [private airline lounges]
  - Quiet spaces for private study, meditation, reflection

new design principles

- Involve students in the redesign
  - o Hold contests for students to redesign the library or a portion of it
- Experiment
- Plan for continuous facility improvement
  - o Every year a new generation of students arrives with new ideas and expectations
  - o Every year returning students should see something new in the library

new designs

- Flexible and adaptive, with effective zoning
- Warm and inviting (natural light, airy)
- Combine relation and contemplation spaces
- Collaboration and individual quiet study
- Self-service (signage, easy to use and find)
- Mobility: everything on wheels
  - Tables
  - Chairs
  - WiFi-enabled
  - Electrical sockets everywhere

newer visions

- learning hubs
- information labs
- digital scholarship centers
- social centers
- collaboration centers
- Maker-spaces

create engaging client environments

before

after

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create engaging client environments

open and inviting service areas

Active areas to engage with technology

create engaging client environments

Make things fun and interesting

make advanced technologies available
DATA VISUALIZATION

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collaborative learning environments

before

after

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collaborative learning environments

… and choose a consistent and warm color palette that will not quickly date itself

collaborative learning environments

design effective instructional spaces

before

after

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design effective instructional spaces

before

after

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provide centers for digital scholarship

3D SCANNING

3D PRINTING

relaxation spaces: cafe

before

after

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relaxation spaces: art gallery

before

after

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signage

lighting

study areas

before

after

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seating

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Questions and Comments

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