

Libraries Budget Review Working Group Update Report

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The Working Group

In April 2024, Provost Dr. Susan Tighe struck the Libraries Budget Review Working Group (LBRWG) to review the recommendations outlined in the McMaster Libraries External Review and identify a pathway for consideration by the Provost and the Dean and Vice-President of the Faculty of Health Sciences (FHS). The working group was comprised of Dina Brooks, Executive Vice-Dean and Associate Vice-President, Academic, FHS; Vivian Lewis, Associate Vice-President and University Librarian; Jennifer McKinnell; Director, Health Sciences Library; and Melissa Pool, Associate Vice-President, Academic Planning and Finance.

The complete set of recommendations the external review panel put forward was considered. However, the group focused specifically on those recommendations directly related to joining the two library systems at McMaster.

The following core values and assumptions were drafted to guide discussions and inform decisions related to proposed implementation strategies:

- **Organizational Excellence:** We will leverage each organization's most successful components. In some areas, we recognize that the best solution may be to abandon current practices in both libraries and build something completely new together.
- **User Experience:** We will propose changes that maintain or enhance the overall user experience in our physical and digital spaces.
- **Employee Experience:** We will maintain or enhance our employees' workplace experiences when proposing changes.
- **Respect:** We will respect the distinct information needs associated with specific disciplines and each library's unique culture.
- **Expertise:** We will leverage specialized knowledge across the system to enhance the user experience and create more rewarding roles for workforce members.
- **Stability:** We will be deliberate and thoughtful in our approach. We will avoid introducing undue disruption to our users or our workforce.
- **Efficiency:** We will reduce duplication of effort where it exists and, in doing so, free up workforce members to engage in more rewarding and value-added work.
- **Planning:** We will create new opportunities for shared visioning and planning
- **Communication:** We will strive to enhance opportunities for communication across all libraries.

A Made-at-McMaster Model

The LBRWG supports the concept of bringing the two organizations closer together, building on their strengths and impact - both with local stakeholders and across the North American research and health library communities.

For that reason, we will introduce a "made-at-McMaster" model that:

- a. leverages the most successful components of each organization
- b. focuses on leveraging existing resources
- c. reflects a mix of organizational and governance changes, and
- d. incorporates a plan to review, evaluate, and revise the model over time.

The following initial framework outlines immediate and longer-term strategies for implementing change. We are committed to leading the campus libraries through new opportunities as they arise and building upon these advances well into the future.

Immediate

The areas below require immediate attention: name, structure and governance; library budget; strategic planning; digital assets; and library statistics and impact.

1. Name, Structure and Governance:

The concept of the University Library (comprising Mills Memorial Library, Innis Library and the Thode Library of Science and Engineering) will cease to exist as a separately defined and named system, to be replaced by a new campus-wide system collectively known as McMaster University Libraries (MUL), inclusive of the Health Sciences Library.

The Director of the Health Sciences Library will become a full member of a newly reimagined McMaster Libraries Leadership Group (MLLG). The mandate for the MLLG will be rewritten to serve as the executive leadership team for McMaster University Libraries.

A dual reporting framework will be established for the Director of the Health Sciences Library outlining their responsibility to the Associate Vice-President and University Librarian and the Executive Vice-Dean and Associate Vice-President, Academic, FHS. The LBRWG acknowledges that this reporting framework will be reviewed regularly and may require adjustments over time.

All individuals working in the Health Sciences Library will continue to report to the Director.

2. Library Budget:

The budgets of the two organizations will be consolidated for submission to the Budget Committee beginning in FY2027. (A shadow budget will be created in FY2026 for internal use.) Accounts will be rolled up into a combined McMaster University Libraries budget tree. Allocations within this new budget structure will continue to roll up to specific members of the MLLG based on position roles and responsibilities, including the HSL allocations. Under this approach, the Director of the Health Sciences Library will retain oversight over HSL budget allocations.

The Director of the Health Sciences Library will participate in all budget logistics and priority-setting conversations alongside other McMaster Libraries Leadership Group members. Within this context, a more robust process for collectively deciding if, when, and how vacancies will be filled will be introduced to ensure consistency, transparency, and financial prudence across the organization. Existing practices for prioritizing, projecting and monitoring collections and other operating expenditures will be reviewed and improved.

3. Strategic Planning:

The McMaster University Libraries will manage a single strategic planning process that reflects campus libraries' shared vision, mission, and objectives. The process will incorporate both a new, combined multi-year Strategic Plan (effective 2026) and an annual planning process. The Health Sciences Library's commitment to the healthcare community will be incorporated into the process to ensure critical health information services and access to resources continue. The annual planning process will include enriched opportunities for individual units to create, share and seek feedback on operational plans.

4. Digital Assets:

McMaster University Libraries will establish a more cohesive and collaborative process for building and maintaining key digital assets, in particular, public web pages. To that end, a working group will be struck with representatives from both organizations. This work will start shortly under the purview of the newly established MLLG.

5. Library Statistics and Impact:

McMaster University Libraries will begin to work on a consolidated strategy for collecting, storing, and using library data for decision-making. Where it makes sense, an attempt will be made to standardize data collection across campus libraries. Individual libraries will continue to collect specialized metrics appropriate to their subject domain and required by professional associations.

Longer term

Workforce Engagement

In addition to the above immediate priority areas, several other library functions require attention, including, but not limited to, resource acquisition and maintenance, open scholarship, archives and special collections, support for research and innovation, support for teaching and learning, and front-line services. To this end, working groups of key stakeholders from within and outside the libraries will be struck (with clear timelines and mandates) over the next several months to inform opportunities, achieve efficiencies and adopt positive change. To reduce staff burden, the teams will be structured to work sequentially.

Administrative Operations

The LBRWG acknowledges that joining administrative operations, which in the case of the Health Sciences Library, are delivered through the Faculty of Health Sciences, will require significant input from additional stakeholders. Facilities management, human resources, support for desktop computing, advancement, communications, and budgeting support are all areas that need further consideration, costing, and capacity review before any final recommendations can be made. The Associate Vice-President and University Librarian and the Director, Health Science Library will lead these consultations and, where changes are significant, produce recommendations for consideration by the LBRWG.

Conclusions and Next Steps

The LBRWG views the immediate changes to name, structure and governance, library budget, strategic planning, digital assets and library statistics and impact, not as the final product, but as the foundation for future work. Our desire is to expand and evolve the Made-at-McMaster model over time, with a focus on forward movement and adaptability.

The LBRWG will continue its work for the next twelve to eighteen months to both oversee progress and guide further explorations and decision-making.