

**Robertson Library
University of Prince Edward Island**

Report of the External Review Committee

May 17, 2005

Committee Members:

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Background:

The decision to conduct an external review of the Robertson Library was made in early February of 2005. Dr. Vianne Timmons, Vice President (Academic Development) contacted the two external and one internal members of the External Review Team and coordinated a two day visit to the University of Prince Edward Island. The reviewers spent Tuesday, April 12, 2005 and Wednesday, April 13, 2005 on the UPEI campus, holding a series of meetings with the Vice President (Academic Development), Vice President (Research Development), the Academic Deans or their representatives, the Acting University Librarian, an open meeting with interested members of the campus community, as well as a series of individual and group meetings with librarians, technicians, and other interested library users. The members of the External Review Team were given extensive background documentation on the Robertson Library, including budget and staffing documents, past internal and external review documents, regional comparisons, as well as a complete tour of the facility. Members of the UPEI community were given access to the Committee via a confidential internet address, as well as personal e-mail addresses of the review committee team, and formal and informal individual and group meeting times, should they have been desired.

The members of the External Review Team were very pleased with the high level of interest in the review process. We were also struck with the degree of personal interest, honesty and passion exhibited by the many individuals and groups we heard from during the review process. The Vice President (Academic Development) charged the External Review Team with a series of 13 areas to be considered during our review, ranging from the adequacy of the collections, various collections policies and procedures, to the adequacy of communications within the library, the effectiveness of the staff, university governance structures and the role of the Library within the province, and the regional system of academic libraries. While we were certainly aware of these various areas during our evaluation, we soon realized that the entire review required a high degree of sensitivity and attention to the past, present and future concerns of the internal Robertson Library staff, as well as the larger campus community, on the "staff morale" issue within the Library. All aspects of the review, including internal discussions with staff, external community discussions with students, faculty, administrators, and other university employees, as well as written submissions and communications, centered on what became characterized as a "poisoned work environment" in the Robertson Library. Every individual we interviewed or heard from in written submissions weighed-in on the staff morale issue, including strong commentary and personal feelings on interpersonal work relationships, perceptions of fairness and inappropriate behaviours, a lack of trust, work-related stress and personal health issues, etc.

As has been documented at the University in previous reports and interventions, staff morale and the overall work environment have become the focus of the community and the highest concern for any future progress in the Library because they affect all Library personnel and impact on the quality of services that they can provide to the community. As a result, the members of the Review Team decided to address this primary issue in all aspects of the review, rather than focusing on issues of policy and practice with no

attention to the human resource and interpersonal conflicts at the core of the Library's ability to be a high-quality, effective, service-oriented and enjoyable place to work, research and study. The Review Team has concluded that our central recommendations need to focus on the transition period between the current state of affairs in the Library and the eventual hiring of a new University Librarian. From these central recommendations, the Review Team will then make other critical and related recommendations.

It should also be noted that the members of the External Review Team spent a significant amount of time studying the Internal Review Committee Report of July 2003. We found the Internal Report to be a useful and thorough appraisal of the Library's technical operations. While the Team noted that some aspects of that Report had been acted upon, and certain members of the Library staff or their responsibilities had changed, relatively little has been done to address the key recommendations detailed in that document. Now, nearly two years later, the External Review Team kept returning to the summary comments, detailed analysis and major recommendations made in that Report and will simply reference various aspects of that Report and its recommendations in our current report and recommendations.

The current administration and management of the Robertson Library and Transition to a new Management Team and Structure:

After years, perhaps decades, of recurring issues of a dysfunctional workplace and poisoned daily work environment in the Library, it is clear that the staff of this critically important academic unit are tired and frustrated with the lack of progress toward the creation of a healthy and respectful workplace. There is little sense of community or shared purpose and little trust or confidence in the administrative solutions that have been introduced or suggested. Successive University Librarians have been seen as both the solution to the Library's problems, or conversely, the source of those problems. The overall governance structure of the University and the role that the senior management team has played are seen to be lacking in the eyes of the staff in the Library. While most of the submissions received, either orally or in writing, admit to staff members' own role in creating this negative work environment, there is an overall sense of paralysis when it comes to finding a solution for making the Library a place where these individuals will feel motivated to make a positive contribution, and feel valued in their professional roles within the unit. An intricate system of historically based "camps" has evolved, each with a long-held sense of grievance, of ideas ignored, of personalities being either built-up or diminished – all based on friendships, workplace loyalties, and perceptions of unprofessional behaviour.

This external review comes at a moment in time where the University is set to enter into the recruitment and hiring of a new University Librarian. The senior administration of the University has demonstrated that they see the Robertson Library as a key part of the overall academic program and a central part of the academic plan for the future of the

institution. Both the Vice President (Academic Development) and the Vice President (Research Development) spent a significant amount of time with the Review Team. They support the enhanced role of the Library in the overall success of the university in attracting outstanding students, researchers and teachers. They are also clear on their desire to assist the staff of the Library in developing a more positive sense of community and believe they have demonstrated this commitment over the past several years. The University Administration also appears to be tired and frustrated with the current state of affairs in the Library. The Review Team is concerned that the administration may start to perceive the Library as dysfunctional and not worthy of the time and energy needed to enhance the collection, the professional staff and the physical plant of the Robertson Library. We believe that there needs to be a series of rather immediate changes in the management of the Library – prior to the recruitment and hiring of a new University Librarian.

Recommendation #1:

The University should move to engage a Management Consultant to assist the Library staff and the senior management group of the University in establishing a work environment conducive to the most effective delivery of teaching and learning support services.

The members of the Review Team, as well as the vast majority of those interviewed during the review, were impressed with the efforts made on the part of the Acting University Librarian, Suzanne Jones. Given the current level of stress and tension, she has outlined her primary goals and has worked very hard to improve the workplace environment for all concerned. We believe that the Acting University Librarian should work with a management consultant, employed for a period of 3 to 6 months, in building trust and respect among Library staff and the other units of the University. Any delay in working with the existing morale problem in the Library will risk further damage to an already fragile situation, including loss of valuable staff, increased or extended medical leaves, further erosion of the workplace atmosphere, and a disconnect in the development of the University's academic planning efforts. Elements of the role of a management consultant in the Library would include the following:

- The management consultant would be an external change agent, not a current or former university employee or known entity to either the Library staff or the University's Senior Management Team. A nationally recognized management consulting firm should be contracted, with experience and a known expertise in dealing with such human resource situations. Members of the External Review Team could be consulted on this selection process.

- The Acting University Librarian would be charged with implementing the other aspects of this review, as well as those documented in the Internal Review and the Library's Strategic Plan and Academic Planning documents. She would work closely with the Management Consultant on identifying the major challenges within the Library, in both the personnel and operations sides of the unit.
- The management consultant should report directly to the President, with associated reports to the Director of Human Resources, the Vice President (Academic Development) and the Vice President (Research Development).
- The management consultant should be allowed to reconsider current staffing vacancies and refine or adapt to the identified needs of modern academic libraries. The replacement of vacant staff positions should proceed, allowing for adequate or increased staffing to be felt in the Library immediately. Staffing issues need to be dealt with in a parallel process to the overall morale issue, as we believe that the actual number of staff working in the library is part of the solution on workload and staff motivation.
- The management consultant should be allowed to engage in human resource counselling of all Library staff. The time has passed for group counselling and facilitation processes. It is clear that there are some long-held, serious issues that may need to be dealt with through employment counselling. The consultant should be provided with the greatest amount of latitude in dealing with these situations, including long-term medical leaves, early retirement options, transfers to other units of the university, or dismissal or employment buy-outs. All of these options will most certainly have to be developed and carried out within existing collective agreements and established employment processes.

Recommendation #2:

The University should commence the search for a new University Librarian during the October 2005 – March 2006 period. The University Librarian position should be established as an academic administrative position equal to that of a Dean and should report directly to the President of the University.

The University Administration has already appointed the Acting University Librarian to a further year, ending in June of 2006. This period should be used to position the Robertson Library and the University so that they are able to recruit a high-quality University Librarian through a national search process. The groundwork completed by a management consultant will assist in demonstrating that the University is serious about dealing with the staff morale issues currently debilitating the Library's role within the

university. The Review Team believes that having the University Librarian on par with other academic units, and having the UL hired as a Dean, will attract the right individuals to the University and will send a clear message to the university community that this is a key academic unit. There was strong support from all areas during the review that suggests that this type of reporting structure would assist in moving the Library forward on personnel, budget and operational fronts within the university.

The search process for a new University Librarian could involve the management consultant, if desired. A national search is recommended and we recommend that the University follow the guidelines for the appointment and review of University Chief Librarians, as set out in documents by the Canadian Association for University Teachers (May, 2003).

Recommendation #3:

The University should establish the position of Associate University Librarian (Operations), to be appointed after the appointment of a new University Librarian.

The appointment of an Associate University Librarian (Operations) would assist in the day-to-day operations of the Library, including the management of the range of staffing, budget and other operational aspects of the Library. This would allow the University Librarian to concentrate on the strategic and academic planning required for the Library, as well as integrating library operations and plans within the larger University-wide planning and delivery models. The University Librarian should have a much higher profile across the University, in terms of budget development, academic policies and governance issues, establishing outreach to the other parts of the campus, as well as the larger community, the government, alumni and potential partners and donors. Again, it is recommended that the University Librarian follow the CAUT guidelines for the appointment of an Associate University Librarian.

Recommendation #4:

The University should establish a Library Advisory Council that recommends on the formulation of Library Policies. Membership should include all librarians. The University Librarian should chair the Library Advisory Council and there should be elected representation from library staff/technicians, as well as one student representative, nominated by the Student Union. All members should enjoy voting privileges.

A Library Advisory Council is certainly the norm within Canadian universities, with most having a reporting mechanism to the University Senate. Such Councils allow professional librarians and staff technicians a forum in which to discuss any issue that has an impact on librarians, the library, or issues in academic librarianship in general. Most universities establish the roles and responsibilities of Library Advisory Councils within relevant collective agreements.

It appears that the current Library Advisory Group (LAG) has been an attempt to create a forum for advice to the University Librarian, yet there has been a series of identified structural problems with this group. The LAG has become part of the poisoned environment developed within the Library and the External Review Team heard a range of criticisms about the structure and relevance of this particular body. Following the two day review period, the External Review Team was so concerned about the morale within the Library that we suggested the following immediate actions on the part of the Acting University Librarian and the Vice President (Academic Development):

- Suspend the Library Advisory Group (LAG) as it currently exists and establish, in an *ad hoc* fashion, an advisory group consisting of all Librarians and the current Lead Technicians. This will allow all librarians to participate in the advisory process, yet respect the current administrative advisory process established for representation by Lead Technicians. If one or more Leads is/are on medical leave, an election of a representative from the entire technical staff should be completed. All meetings would then be open to all librarians. Minutes should be taken and distributed to all interested members of the community, via the library webpage.
- Establish regular meetings with the Vice President (Academic Development) to keep her informed of activities and challenges within the Library. These should be at least once every week.
- Maintain regular contact with other regional academic librarians, including the newly formed Northumberland Caucus and other Atlantic universities. This will assist in shared professional development activities for all of the librarians, as well as increase access to new ideas emerging in library science.
- The members of the Review Team, especially the University Librarian from the University of Windsor, have agreed to remain in touch and available for consultation with the Acting University Librarian.
- The Acting University Librarian, as a member of the University Senate, should investigate the possible addition of Librarians to the university Senate, or the possible change in eligibility criteria needed in order to allow for academic librarians to be nominated and elected to the University Senate.
- All of these *ad hoc* changes would be subject to review by the new University Librarian, once appointed.

The adequacy of the collections to support the University's academic programs

The Review Team reviewed past User Surveys, as well as hearing from student, faculty and community user groups that the Robertson Library collection is not keeping pace with the current role of an academic library, in terms of both the quality of the collection and the quantity of the collection. The University of Prince Edward Island has displayed enormous growth and change over the past several years, in terms of the number of undergraduate students enrolled, the development of graduate programs, exponential growth in the research taking place at the University, and the role the University plays in the larger community. By any measure, whether it is the regional comparison of libraries through the Council of Atlantic University Libraries, or the annual *Maclean's University Rankings*, the Robertson library has not kept pace with the growth in student numbers, the changing role of academic libraries and the overwhelming growth in print and electronic journals needed in today's world. The University of Prince Edward Island is falling behind other academic libraries of equivalent size and risks losing its ability to make a valuable contribution to its own students, faculty and community, as well as the regional network of academic libraries.

The External Review Team noted some progress on the development of a more comprehensive Collections Policy, yet there is still much need for the establishment of a weeding policy in all areas of the library, as well as a collection management plan. The Review Team supports the Internal Review Report and recommends the following changes:

Recommendation #5:

The University should increase the acquisitions budget by at least 5% annually with a substantial percentage of this increase devoted to those areas of the collection that require additional print materials and to allow for the purchase of e-materials, including full-text journals, that support all academic areas, especially the social sciences and humanities. This budget increase should be based upon a multi-year plan, prepared by the Collections Librarian and the University Librarian, that provides a comparative analysis of the changing university student and program populations and requirements for resources, and the existing collection.

– The Effectiveness of Services

Although students, staff and the overall community recognize the range of staff issues present in the Robertson Library, the actual effectiveness of services to students in undergraduate and graduate programs, as well as those on faculty and staff, remain quite

high, with service as the core of the Library's mission. There appears to be agreement that the Library needs to develop on-going methods for evaluating services and that each member of the staff, both librarians and technicians, need to be aware of emerging trends within the profession and always focus on the users and their needs. One of the key areas in basic service to the community involves the actual number of hours of service that can be provided. This is an area where the staffing of the Library is clearly problematic and a number of suggestions and solutions were heard during the review process. Any enhanced budget for the library should attempt to produce an increase in opening hours. The following recommendations, if adopted and funded, would most certainly enhance the number and distribution of professional and support staff, as well as the overall effectiveness of services to the University community.

Recommendation #6:

There should be an increased allocation to staffing so that the Robertson Library can open for longer periods of time, especially evenings and weekends, as well as periods before and during examinations. The members of the Student Union should be consulted on these periods of extended hours.

Recommendation #7:

The University Librarian should work with the staff, unions and administration to study the feasibility of increasing staff hours to a standard 37.5 hours per week, as well as a plan to create more flexibility in the number of hours worked at different times of the day, week and academic year.

Relationships and Communications

One of the most powerful vehicles for a culture change in the Library will be the development of internal and external relationships and an enhanced communications strategy with those individuals and groups. Just as the library staff must be knowledgeable about trends in scholarly communication, the Library must also become much more active in the promotion of the Library across the campus – and beyond. The University Librarian will be key to the development of an enhanced external presence for the Library, both on campus, across the Island and throughout the Atlantic region. The promotion of the Library's services and collections will also require a much higher level of "friend-raising" and "fund-raising" activity, so that all of these initiatives can attract financial support beyond the usual operating budget. The members of the Review Team found that the Library enjoys an important role and status in the minds of those who see the mission of the University as one that spans students, staff and the larger community across Prince Edward Island. Yet there is a need to have those positive feelings turn into

active and visible support for the critical role of the Library. We found that the Internal Review Committee Report of July 2003 has some excellent recommendations on ways in which the Robertson Library could enhance its image through communications with various stakeholders. Beyond the recommendations listed there, we would urge the University to consider the following recommendations:

Recommendation #8:

Under the direction and leadership of the University Librarian, the Robertson Library should become an identified centre of excellence for enhanced fund raising efforts and a key partner in establishing outreach to the campus community, the province and the Atlantic Region.

Recommendation #9:

The Robertson Library, under the leadership of the Vice Presidents, Deans and University Librarian, should become a full partner in the development of the Webster Centre for Teaching and Learning that is expanding into the former student lounge. Further, the External Review Team would recommend that the Library become part of an integrated approach to teaching and learning at the University, where the Learning Centre, Math and Writing tutorial services, already incorporated into the Centre, and a Library Information Commons, would be combined into a seamless learning environment which would optimize the use of space in the building, as well as returning the Library/Learning Centre to a focal point for students and faculty alike.

Recommendation #10:

It is recommended that the University contract a Space Consultant to assist in the overall design of the building, including the new Learning Centre area and various spaces within the current Library facility. It is strongly recommended that the current space devoted to a "Retired Faculty Lounge" within the Library be relocated to another building (perhaps part of the current Faculty/Staff Lounge area) and that this space be used to add appropriate research and study areas for students and researchers.

The members of the Review Team have found a recent publication to be very helpful in these areas. Entitled: *Library as Place: rethinking Roles, Rethinking Space*, is a February 2005 publication by the Council on Library and Information Resources, Washington, D.C. It is recommended reading and is free of charge at:
<http://www.clir.org/pubs/abstract/pub129abst.html>

Recommendation #11:

The University Librarian should open dialogue with the Dean of Education to explore the possible integration of the Education Resource Centre into the Robertson Library. This would certainly provide an extra level of integration and service on the part of the Library.

Recommendation #12:

The University Librarian, in consultation with the President, should develop a clear role for the Robertson Library as a major partner with the Province of Prince Edward Island's archival holdings, Prince Edward Island Collection, Government Documents and Media Centre .

As the province's only university, with an established national reputation for the Prince Edward Island Collection, there is a clear need and responsibility for the government to enter into discussions on this partnership arrangement. Several reports have already been written on the extreme value to the University and the Province of establishing a centralized records management and archives program, including the hiring of a full-time, qualified archivist. We view this as a very important area for financial and human resource discussions with the government. There is a key role for the University in the overall historical framework of the province. As a Centre of Excellence, the University and the province may be eligible for federal infrastructure and heritage funding.

Cooperative Ventures with other libraries

The Robertson Library is well positioned to be a major leader and active participant in the development of the Council of Atlantic University Libraries ASIN Portal Project. Having students and faculty at UPEI connected to a broadcast catalogue search, as well as a contributed information content source, as part of a regional network is very promising. The recent addition of professional development activities to this network is evidence that small, primarily undergraduate universities can be competitive through such consortia.

Recommendation #13:

The Robertson Library, through the University Librarian and professional staff, should participate fully in the development of the ASIN Portal and other related projects, as a member of the Council of Atlantic Universities. Sufficient budget allocation should be provided for this expanded level of participation.

Concluding Comment

The University of Prince Edward Island is an important part of the cultural and educational fabric of the Atlantic Region. The University has been undergoing a significant period of growth, in terms of student enrollments, program development, increased graduate level studies and unprecedented growth in research and development. Everyone associated with this review agreed that the Robertson Library is an essential part of the continued growth and success of the University. Yet there are serious problems within the Library that could paralyze the University and its ability to move forward on these various fronts. The External Review Team were very impressed with the enormous level of respect for individual professionals within the Robertson Library, as well as its on-going reputation as a place that serves its users, regardless of the internal conflicts that may exist between these individuals or the rather limited budgets and staffing levels. The senior administration of the University has recognized that it is essential to address the staffing issues and we were pleased that the External Review was viewed as another positive step towards resolving these issues. While we were not called upon to solve the human resource problems within the Library, we recognize that mechanisms exist that could assist the University in dealing with these issues. Following the recommendations of the July 2003 Internal Review Committee Report would be a very positive first step. In parallel with the recommendations of that Report, this External Review Report is designed to provide a series of recommendations that would see the ultimate resolution of the management and human resource issues at hand and allow the administration to consider a long-term budget process, where the Robertson Library grows to, at least, regional levels of spending, staffing and collections.

The situation, while critical, is certainly within the University's ability to solve and it is essential for all of the members of the professional and technical employee groups of the Library to put the best interests of the students, staff and the University first as they work through these difficult times. The Library must remain the life-blood of the university and no one individual or cause should stand in the way of the mission of this academic unit. We remain confident that the Robertson Library will regain its impressive reputation as a beacon of service and academic quality within the region.

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