Report and recommendations of the
Affiliated Libraries-The Library Task Force (UC Berkeley)
Spring 2004

The Task Force to Maximize Benefits of Affiliated Libraries - The Library Relationships was established at the end of summer 2003 in response to a need articulated by the Affiliated Libraries community. Its charge was to review and recommend on issues regarding the relationship between these two sectors of the UCB library system. This report was distributed to The Library Cabinet, The Affiliated Libraries Administrative Group (TALAG), the Academic Senate Committee on the Library, the Library Association of the University of California, Berkeley, Executive Committee (LAUC-B ExComm) and The Executive Vice Chancellor and Provost. The report is also available to the full library community at http://www.lib.berkeley.edu/LAUC/tlaltf_report_04.html

The members of the task force were Co-chairs Isabel Stirling and Lillian Castillo-Speed, Lincoln Cushing (Representative from the LAUC-B Affiliated Libraries Affairs Committee), Carlos Delgado (Library), Ginny Irving (Affiliated), Deborah Sommer (Library), and Linda Vida (Affiliated).

The Affiliated Libraries:

Architecture Visual Resources Library (AVRL)

Continuing Education of the Bar Library (CEB)

Environmental Design Archives (EDA)

Earthquake Engineering Research Center Library (EERC)

Ethnic Studies Library (ESL)

Giannini Foundation of Agricultural Economics Library (GFL)

Institute of Governmental Studies Library (IGSL)

Institute of Industrial Relations Library (IIRL)

Institute of Transportation Studies Library (ITSL)

Law Library (Law)

Water Resources Center Archives Library (WRCA)

Contents

All recommendations are summarized on insert sheet, pages 9-10.

Introduction

Library resources on the Berkeley campus of the University of California are rich and varied. There are three major types of library organizations on the campus: The Library, the Affiliated Libraries, and informally managed departmental collections that do not employ academic librarians and offer limited services. These libraries are also physically dispersed and administratively decentralized, which leads to confusion for our patrons since they tend to think that library services on campus are provided by one library. Please note that departmental collections are not considered in this report.

Affiliated Libraries are typically connected to particular departments, professional schools, or organized research units (ORUs), to which they report, whose cultures they share, and through which they receive much of their funding. They are staffed by librarians in the Librarian series and non-academic staff. These libraries are administratively separate from The Library system and from each other.

The primary mission of the Affiliated Libraries is to support the teaching and research needs of their respective organizations. Their collections and services reflect these specialized concerns. However, most Affiliated Libraries serve not only their organizations, but also the general campus and off-campus communities. And some Affiliated Libraries have a much broader mandate: to serve the University as a whole and the people of California. Whatever their missions, the Affiliated Libraries offer unique subject expertise in a variety of campus settings and play a major role in providing library collections and services to the Berkeley campus and beyond.

The broad mission of service is one that the Affiliated Libraries share with The Library system. But if services are to be enhanced and confusion reduced we need to make the patron's transition from one library to another as seamless as possible. The goal is not to make all libraries the same; the diversity of each library makes this untenable and undesirable. Rather, the goal should be to make the use of our library collections and services as transparent as possible. We all need to present a consistent message that describes the structure of libraries on campus, what they

have in common and how they differ. And this message needs to be ubiquitous, reaching not only library patrons, students, faculty, staff and community, but also the University administrators who are ultimately responsible for the development and support of our libraries.

Recommendations: 1, 2

1. Collections

The Library and the Affiliated Libraries share common goals to serve campus users by acquiring the best collections possible in all formats. However, collection users, whether faculty, staff, students, independent researchers, or members of the general community, typically do not understand that Affiliated Libraries' collections and The Library collections have different funding lines, although our public face often lists these collections side by side.

What works:

Some long term and informal cooperative agreements have helped to strengthen the overall library resources on campus. The Affiliated Libraries' collections significantly supplement The Library's collections. For example, The Library relies on IGSL to collect California local government documents; on ITSL for transportation engineering, policy, and related material; on WRCA for material on all aspects of California water; and on the Law Library for law materials. On the other hand, The Affiliated Libraries rely on The Library to provide major resources that support their collections, including long runs of serials, electronic bibliographic databases and other digital collections.

The Affiliated Libraries and The Library also cooperate on collections in less direct ways. For example, The Library staff regularly call upon the specialized collection development expertise of Affiliated staff. Affiliated Libraries send out-of-scope or withdrawn materials to The Library's Gifts and Exchange department, which are then sold. Some Affiliated Libraries serve as repositories for Government Printing Office depository materials, reducing

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demand for shelf space in Library units, while facilitating the acquisition of this material by Affiliated Libraries. Also, Affiliated Libraries and The Library depend on each other's holdings (for example, serials titles) when making cost-cutting decisions. Lastly, collections statistics for the Association of Research Libraries (ARL), the Northern Regional Library Facility (NRLF), and other purposes are maintained by The Library, thus relieving the individual Affiliated Libraries of duplicative efforts.

What needs improvement:

Three areas of collection management could use some improvement: grant writing for collections, the consistent inclusion of Affiliated Libraries in campus funding for collections, and the preservation of collections.

The Library's grant-seeking activities to enrich collections do not routinely include the Affiliated Libraries as the recipient of funding even though the existence of or access to the diverse Affiliated Libraries collections may improve the chances of receiving funding. Likewise, the Affiliated Libraries do not routinely include The Library as stakeholders in their grant proposals.

Although the users of the collections do not appreciate the administrative differences between the Affiliated Libraries and The Library, the campus administration does make funding distinctions, either specifically excluding the Affiliated Libraries collections when it comes to funding augmentations or merely ignoring any mention of them.

Regarding the preservation of collections, it is unclear if The Library Preservation Department would provide disaster assistance at no cost or routine assistance on a cost-recovery basis to Affiliated Libraries. Although several Affiliated Libraries report that help seems to be available from the Preservation Department and that they have been included in emergency plans for priority evacuation of special materials, there is no clear policy on whether and to what extent all the Affiliated Libraries can participate in those evacuation plans.

Recommendations: 2, 3, 4, 5, 6

2. Communication

"Communication" is a broad category that includes both how resources and news of the Affiliated Libraries are shared with the broader Library community as well as how The Library shares information with the Affiliated Libraries. Several mechanisms exist for the dissemination of information among and between all the library units. These include

- e-mail reflectors,
- *CU News,*

- Web sites,
- assemblies, early birds, and other gatherings, and
- printed materials.

Although most of the communications issues raised in this document are purely internal, some of the communications target the general public, and that facet is addressed under "Public Relations/Outreach," issue 8.

What works:

In general, Affiliated librarians seem to feel that the basic array of communications mechanisms function well. Affiliated Libraries are on The Library e-mail server (allusers, refstaff, etc.) and are included in items posted to *CU News.* Some Affiliated Libraries are included in The Library's Staff Web Directory. Affiliated librarians are routinely invited to be on Library task forces and to participate in Library exhibits, and they are included in outreach publications of The Library such as library maps and the Library Guide. Affiliated librarians are statutorily included in LAUC and participate on The Library councils (Social Sciences, Arts and Humanities, Administrative, Public Services, etc.).

Informal communication among librarians across units has successfully supported effective reference referrals and collection development decisions. Groups have formed autonomously on campus (e.g., Berkeley Archivists Group, Northern California Design Librarians) whose primary motive is to share information about collections, services, grants, training opportunities, and other resources.

What needs improvement:

There is often confusion when Affiliated staff are invited in "alluser" calls for participation in workshops or tours of The Library resources (e.g., database training, training on on-line cataloging tools, reference skills) but are unsure about their eligibility. The most-identified problems had to do with invitational communications.

The public aspect of this problem arises when patrons are confused about differences in library OPACs and access policies and practices. Often, these differences are not known nor communicated by Library staff when advising patrons.

Affiliated Libraries could also do a better job of communicating among themselves (for example, by using the Affiliated Libraries Assemblies to talk about common issues and concerns).

Recommendations: 7, 8, 9,10

3. Public Services

The Affiliated Libraries serve the entire campus community as well as their own constituencies. This issue focuses on how the UC community and other patrons interface with the UC Berkeley library system, including The Library and Affiliated Libraries, and what types of services are provided to them. Included are interactions through the library catalogs and various Web sites, circulation, reference services including referrals, policies affecting access to collections, and access to NRLF materials, training classes, and interlibrary loan and copy services. Some issues in Public Services overlap with Collections and Public Relations.

What works:

Affiliated Libraries and The Library collaborate in providing public service to our shared constituencies. Here are a few highlights of the many examples of this collaboration. Public service staff in both The Library and Affiliated Libraries disregard administrative differences when referring library users to needed collections or services. The Interlibrary Lending unit of The Library's Interlibrary Services borrows material from both The Library and some Affiliated Libraries to lend to other UC campuses and beyond. Library-sponsored public service training sessions are open to Affiliated Libraries staff. The Library Systems Office routinely provides certain kinds of support to Affiliated Libraries, including technical support for those units with records in GLADIS/Pathfinder. Affiliated Libraries with archival collections have their Finding Aids included in the Online Archive of California (OAC), often with the assistance of The Library staff. Lastly, contracts negotiated by The Library for photocopy machines generally include the Affiliated Libraries.

What needs improvement:

A significant public service problem is the lack of a single UC Berkeley catalog. Access and circulation policies differ both between The Library and the Affiliated Libraries as well as among the Affiliated Libraries, potentially causing confusion for patrons. Some Affiliated Libraries have all their records in GLADIS/Pathfinder and some do not, causing further confusion (see also issue 5). All Affiliated Libraries' NRLF records are included in GLADIS/Pathfinder as are The Library's; however, for some of the Affiliated Libraries these are the only records that appear in GLADIS/Pathfinder.

The retrieval and delivery of NRLF materials also present problems. Affiliated Libraries lack access to The Library's autocirculation system (GLADIS Autocirc) which tracks the movement of materials requested from NRLF. Equally important, there is no intra-campus truck delivery of NRLF materials to Affiliated Libraries, although such delivery is available to Library units. These delivery and retrieval problems limit the Affiliated Libraries' ability to provide easy access to NRLF materials, causing delays and creating negative public impressions of campus library service. The intermittent demand for NRLF materials makes it difficult to justify parallel delivery services.

Lastly, because we share clientele across the campus, we also share 'problem patrons.' Lack of information about 'problem patrons' in Library settings has reduced the effectiveness of Affiliated Libraries' responses to those same patrons in Affiliated Libraries' settings.

Recommendations: 2, 9, 11, 12

4. External Funding

Libraries on campus increasingly seek external funding to support their collections and services. The search for funding can take the form of donor solicitation or grant writing. Many academic departments and ORUs also support development activities to identify potential sources of funding. The Library, the Haas Business School, the School of Engineering, the College of Environmental Design, and the Law School are among the units that maintain active donor relations programs.

What works:

The Library maintains an active and successful Development Office. According to their Web page (http://www.lib.berkeley.edu/LDO/), The Library has built a constituency of over 6,000 current donors since 1990, including UC Berkeley alumni, library users in the community, and others interested in books, publishing, and information technology.

The Library Development Office's Web site highlights The Library's collections and needs. To the extent that it does so it helps focus attention on all libraries on campus.
The Web site also makes it easy to become a library supporter (Library Associate).

Some Affiliated Libraries such as ESL, EDA, and IIRL have partnered with The Library in developing and/or implementing grant proposals. These partnerships are made more likely when the Affiliated Libraries are able to bring some funding for a particular project or proposal.

What needs improvement:

The Library's Development Office Web site is ambiguous in its representation of who receives the solicited donations. On the one hand, the language in the Web site implies that the site speaks for all libraries on the UC Berkeley campus, for example, in phrases such as "Cal's library" and the dropping of the upper case "T" from The Library's name. Also, the Arts and Humanities Collection and Sciences Collection Endowments pages indicate The Library's involvement only

in the Web site address at the bottom of the "Make a Gift Page" (https://colt.berkeley.edu:444/urelgift/library.html). On the other hand, the omission of Affiliated Libraries from the site's list of "Cal's Libraries" suggests that the site speaks only for The Library. Potential donors to Affiliated Libraries could understandably be confused.

Apart from the Development Office Web site concerns, it is unclear how the needs of some Affiliated Libraries fit into the external funding structures in the units to which they report.

Recommendations: 10, 13, 14, 15

5. Online Catalogs and Cataloging

The statistics for 2001-2002 on UCOP's Systemwide Library Planning website (http://www.slp.ucop.edu/stats) show that of a total 9,388,785 volumes in UC Berkeley libraries, 1,681,077 volumes, or 18%, were held by Affiliated Libraries, and of a total of 83,089 currently received serials, 21,830 titles, or 26%, were held by Affiliated Libraries. Discovering that these materials are available on campus can be challenging for library users.

The UC Berkeley online catalog environment is complex. Campus libraries regard the University-wide Melvyl catalog as the union catalog for the Berkeley campus. It is the only catalog that contains machine-readable records from all UC Berkeley libraries (except GFL), although circulation records are generally not available in Melvyl for Affiliated Libraries. In addition, several Affiliated Libraries have their own publicly-accessible online catalogs, including the Law Library's LAWCAT, the Architectural Visual Resources Library's SPIRO, and the Giannini Foundation of Agricultural Economics Library's ORPHA.

The recent 2001 Task Force on GLADIS and the Affiliated Libraries investigated the feasibility of adding more Affiliated Libraries records to GLADIS/Pathfinder.Its recommendations were put on hold pending the availability of funding sources and an assessment of whether the new Melvyl catalog could serve as Berkeley's local catalog. In 2003 the Pathfinder Review Committee determined that Melvyl cannot serve as The Library's local catalog at this time, leaving library users (and sometimes library staff) with the mistaken impression that GLADIS/Pathfinder is the campus' union catalog.

What works:

The Library and Affiliated Libraries collaborate informally to facilitate the discovery of research materials housed in Affiliated Libraries. For example, after many years of The Library's GLADIS/Pathfinder catalog serving as the de facto Berkeley campus catalog, some Affiliated Libraries' records (EDA, IIRL, ESL, AVRL) have been added to GLADIS, including an Earthquake Engineering Research Center

Library (EERC) electronic journal. Most Affiliated Libraries have brief NRLF records on GLADIS/Pathfinder, including GFL, which is otherwise unrepresented in any union catalog.

The Affiliated Libraries enrich collection access for all campus users. The Affiliated Libraries have in-depth subject emphases and may use specialized subject headings and classification schemes in addition to those of the Library of Congress. For example, IGSL and ITSL selectively catalog journal articles that are especially relevant to their collections and unlikely to be indexed elsewhere. These records display in Melvyl. In addition, many of the Affiliated Libraries catalog unique, ephemeral, and rare materials.

Lastly, librarian representatives from the Affiliated Libraries serve on the Technical Services and Public Services Councils, acting as liaisons between The Library and Affiliated Libraries for issues regarding the online catalogs. Also, the Library Systems Office has helped some Affiliated Libraries set up OCLC as their cataloging utility.

What needs improvement:

Having many different online catalogs on the Berkeley campus is confusing for library patrons and library staff. Also, finding NRLF brief records for most of the Affiliated Libraries on GLADIS/Pathfinder leads users to conclude incorrectly that GLADIS/Pathfinder is a union catalog for the Berkeley campus. Patrons searching in GLADIS/Pathfinder won't find documents held by IGSL, Law, WRCA, EERC, ITSL, or the GFL. In fact, for most Affiliated Libraries continued movement towards a union catalog for the Berkeley campus would be desirable.

In addition to the inconvenience to patrons of not having one catalog for all libraries, Affiliated Libraries that are not represented in GLADIS/Pathfinder do not have access to automated checkout, automated renewals, or automated reserves (unless they have their own online catalog, like LAWCAT). Nor can they view records of UC Berkeley and Stanford patrons in the GLADIS Autocirc system, which may complicate procedures to lend to patrons outside of their unit. Also, most Affiliated Libraries do not have access to the GLADIS maintenance system, which would facilitate updating records and viewing current serials holdings.

Recommendations: 9, 16

6. Academic Staff Career Development and Advancement

What works:

Five areas of Library/Affiliated shared activities support Affiliated Libraries academic staff career development and

advancement: Librarians Association of the University of California (LAUC) participation, LAUC-Berkeley Committee on Appointment, Promotion and Advancement (CAPA) peer review, committee participation, Library events, and training.

As LAUC members, all librarians may serve in an official capacity in LAUC and LAUC-B and participate in LAUC-sponsored events and programs, including LAUC research grants and Townsend fellowships. Lastly, the peer review aspect of merit and promotion review procedures (through CAPA) is equitable and effective.

Library representatives are sometimes invited to serve on Affiliated Libraries search committees. Affiliated librarians serve on a variety of Library-sponsored committees and groups. We have identified the following:

> Administrative Council
> Arts & Humanities Council
> Collections Council
> Sciences Council
> Social Sciences Council
> Technical Services Council
> Web Implementation Group (WIG)
> Selected task forces
> Public Services Council
> Roundtable

Affiliated staff are usually invited to Library-sponsored events, for example, Early Birds, the winter party, and lecture series. These events offer opportunities to enhance career development through formal presentations, as well as through informal contacts with peers.

On an as-needed basis Library staff assist and train Affiliated staff in certain tasks, for example, preparing NRLF deposits, writing grant proposals, original cataloging, sharing Teaching Library PowerPoint training presentations, and in the use of specific databases and other research tools. In addition, Library-sponsored training opportunities are sometimes made available to Affiliated staff.

What needs improvement:

Although the professional development and career development environment is generally robust for librarians from both The Library and Affiliated Libraries, there are a few areas that could be improved. For example, occasionally the administrative review of Affiliated librarians by the University Librarian has been problematic. Some aspects of Affiliated Librarian's dossiers may be inappropriately compared to The Library dossiers because the University Librarian may be unaware of constraints (for example, limited staffing and budgets, as well as explicitly different priorities) peculiar to specific Affiliated Libraries and administrative units. In order to secure a positive recommendation from the University Librarian, an Affiliated librarian may feel pressured to conform his or her work and dossier to the perceived goals and priorities of The Library, which may differ from the goals and priorities of his or her administrative unit.

Outside the review process, administrative funding support for professional travel varies among units, including The Library. Inadequate funding support limits the ability of some librarians to participate in career development activities required for advancement. Communication could be improved between The Library and Affiliated Libraries in a variety of settings. For example, invitations to training and professional events issued to the allusers e-mail reflector are ambiguous about the inclusion of Affiliated staff, who cannot be confident that their presence or attempts to sign up will be accepted. Affiliated staff are generally not invited to the training sessions sponsored by Library Human Resources Department (LHRD). Also, Affiliated staff representatives on Library committees do not consistently report back to TALAG or the Affiliated staff in general.

Recommendations: 1, 5, 7, 10, 17, 18, 19, 20, 21

7. Non-Academic Staff Career Development and Advancement

Non-academic career staff have varied opportunities for career development and advancement. Issue 7 of this report specifically addresses the larger campus context rather than individual work environments.

What works:

Non-academic staff career development and advancement are supported on campus in three principal areas: committee participation, Library events and tours, and training. Affiliated Libraries non-academic staff may serve on selected LAUC and The Library standing committees and groups:

> Arts & Humanities Council
> Berkeley Archivist Group
> Classification Committee
> Circulation Services Group
> LAUC-B Committee on Cultural Diversity
> Sciences Council
> Social Sciences Council

Affiliated staff are usually invited to Library-sponsored events, for example, Early Birds, the winter party, and lecture series. These events offer opportunities to enhance career development through formal presentations, as well as through informal contacts with peers. On an as-needed basis Library staff assist and train Affiliated staff in certain tasks, for example, preparing NRLF deposits, writing grant proposals, and in the use of specific databases and other research tools. In addition, Library-sponsored training opportunities are sometimes made available to Affiliated non-academic staff.

What needs improvement:

Invitations to training and professional events issued to the allusers e-mail reflector are ambiguous about the inclusion of Affiliated staff, who cannot be confident that their presence or attempts to sign up will be accepted. We suspect everyone would benefit from an increase in informal contact between Affiliated and Library non-academic staff; however, the lack of awareness of opportunities to meet each other limits the development of an informal network. There appears to be no centralized funding source for non-academic staff professional development; Affiliated staff are not eligible to receive Library Staff Development Committee funds.

Recommendations: 5, 7, 10, 22, 23

What needs improvement:

Sometimes Affiliated Libraries are left out of the loop in situations where the University has an opportunity to tap the expertise of its complete library community. It is also sometimes the case that Affiliated Libraries resources are inadequately represented in The Library's public information about collections and services. For example, The Library's Sciences Council posted a web list of electronic journals to which they subscribe. Although most of the electronic journals are licensed through The Library, some Affiliated Libraries have access to unique electronic journals that could have been added to the list.

Recommendations: 1, 2, 9, 10

8. Public Relations and Outreach

This issue overlaps "Communications" (issue 2) but concentrates on the ways in which the differences between The Library and the Affiliated Libraries are presented to the general public. Affiliated Libraries serve undergraduates, graduate students, and faculty, and play a valuable role in expanding the reach of the collections and expertise of the UC Berkeley libraries. Many of the Affiliated Libraries, by nature of their specialized collections and audience, fulfill a significant role in reaching out to public and academic communities that The Library does not.

What works:

The special collections represented by the Affilated Libraries have gradually become more visible to patrons. For example, special collections information on The Library's Web site now includes Affiliated Libraries, and not exclusively The Bancroft Library, as in the past. Some Affiliated staff are included in The Library's Staff Web Directory. Affiliated Libraries are also usually included as distribution points in The Library's public relations efforts; for instance, they receive bookmarks and posters about Teaching Library classes and flyers about special exhibits. Affiliated Libraries are included in other Library publications such as library maps and the Library Guide.

In the area of campus library staff outreach, The Library's "Making Effective Referrals" tours include several Affiliated Libraries. *CU News*, The Library's in-house staff newsletter, includes articles about Affiliated Libraries and librarians

Some Affiliated Libraries have developed good relationships with broader-reaching media; for example, IIRL regularly has articles and graphics published in *The Berkeleyan* on subjects such as donated collections and photo exhibits.

9. Special Projects

Much of the work done in a large research library requires bringing together groups of people to work on analyzing and developing recommendations related to specific problems or policies. These groups are dealing with issues that relate to traditional library services and practices, involving subject expertise, technical processing, or reference services, as well as with issues that incorporate new technology, like the Web, into library routines. For example, there was a call for membership on the Web Advisory Group (WAG), which has as part of its mission to "create a vision and mission for the Library website." However, that call may not have reached Affiliated Libraries. As a highly professionalized organization it is very common to pool the talent of its members and put it at the service of broader goals and objectives. The use of committees, task forces, and working groups in developing and implementing special projects is thus expected and encouraged as a management tool. It is more likely that these special projects will be successful if Affiliated staff are invited to participate.

What works:

The participation of Affiliated Libraries on Library-wide special projects and task forces seems to be the norm and not the exception. They are represented in Roundtable, both Subject and Function Councils, and in other standing Library committees. They participate freely in these groups and are able to share any information of interest with other Affiliated librarians.

Affiliated Libraries have also been included in the implementation phase of projects like the Library Faculty Fellows for Undergraduate Research (Mellon Library Partners).

What needs improvement:

There are concerns when new non-standing committees or working groups are being formed. It is not always apparent if the calls for volunteers to new non-standing committees or working groups include Affiliated librarians or not. For example, it is not clear if the call for membership on the Web Advisory Group (WAG), which has as part of its mission to "create a vision and mission for the Library website," ever reached the Affiliated librarians.

Recommendation: 8

10. Administrative Structure

The ultimate goal of this report is to enhance the organizational effectiveness of libraries on campus by improving communication and the sharing of knowledge, as well as facilitating the decision-making process. In this regard, as the task force explored issues of concern to Affiliated Libraries it became apparent that a review of their inter-library administrative structure is desirable. We are pleased to note that preliminary discussions on this report with the head librarians and directors of the Affiliated Libraries have resulted in substantive changes in their group's structure. For instance, they have decided to transform the convener position into a Chair position that is empowered to represent their group, which has been officially renamed The Affiliated Libraries Administrative Group (TALAG).

What works:

The Affiliated Libraries have traditionally associated themselves as a loose-knit community of shared interest. One of the unit heads is designated as the TALAG convener, and that person calls for meetings when there is a concern or problem in common to discuss. This structure seems to work well insofar as it facilitates communication among TALAG members.

What needs Improvement:

Affiliated Libraries need to clarify their place in the broader campus library community. Part of the problem is that there is no one single place, person or structure to contact for information. No single entity speaks for the Affiliated Libraries, that is, there is no position among the Affiliated Libraries that is analogous to that of the University Librarian for The Library. It is very common to hear people ask "Whom do I contact when I need to get information or address issues related to Affiliated Libraries?" This question is heard from those working in the Affiliated Libraries as well as those working in The Library. [As noted above, TALAG has recently taken steps to remedy this situation.]

One example of oversight by The Library is the omission of Affiliated librarians from the annual Association of Research Libraries (ARL) salary survey, which has resulted in at least 20 librarians being excluded from what is intended to be a comprehensive and accurate data set. Another arose in 2003 when The Library received a Mellon Library Partners grant as part of the Mellon Faculty Institute of Undergraduate Research. As part of the grant, faculty applied for and received funding to develop or revise their course curriculum to better utilize campus library resources. Several Affiliated librarians worked with faculty in their subject specialties who had received grant funding. This kind of faculty-librarian cooperation is commendable and is encouraged. However, some Affiliated librarians had not received any advance information about their potential inclusion in this project.

Recommendation: 24

Affiliated Libraries-The Library Task Force Recommendations

3/10/2004, UC Berkeley
Full report available online at
http://www.lib.berkeley.edu/LAUC/tlaltf_report_04.html

Abbreviations used in these recommendations:
LAUC-B Library Association of the University of California, Berkeley
LHRD Library Human Resources Department
NRLF Northern Regional Library Facility
OPAC On-lIne Public Access Catalog
TALAG The Affiliated Libraries Administrative Group
WAG Web Advisory Group
WIG Web Implementation Group

> **Note:** These are recommendations referred to in the accompanying "Report and Recommendations of the Affiliated Libraries-The Library Task Force (UC Berkeley) Spring 2004." The task force recognizes that some recommendations are mere enhancements to already existing relationships, while others may be problematic because of limited resources, administrative structures or other reasons. However, none are impossible and the potential benefits to the campus library community and the population it serves are immeasurable. We suggest that, with this in mind, TALAG, The Library Cabinet, LAUC-B, and the campus administration identify those recommendations that come under their respective purviews and take steps to discuss their implementation.
> -- Respectfully, The Task Force

1. TALAG should meet with the University Librarian or his/her representative on a regular basis. In addition, TALAG is encouraged to invite a Library representative and the LAUC-B Affiliated Library Representative to sit with the group *ex officio*. (This may require a LAUC-B bylaws change).
[Issues Introduction, 6, 8]

2. The Library should adopt the general principle of inviting Affiliated representation or input on policies, projects, or actions that affect Affiliated Libraries and users of those libraries. Collections funding is an example of an important shared library function. Equally important are those groups that help define the public face of libraries to the campus community and beyond. Examples include WIG, WAG, and the committee revising The Library Web. This would ensure that Affiliated Libraries are adequately represented in these systems. Equally important, The Library could benefit from the Affiliated Libraries' special collections and professional expertise.
[Issues Introduction, 1, 3, 8]

3. TALAG and LAUC-B Executive Committee should recommend to the Executive Vice Chancellor and Provost that supplemental funds for collections include *all* campus libraries.
[Issue 1]

4. TALAG should ask The Library's Preservation Department staff to meet with them and discuss possibilities for both routine and emergency preservation services.
[Issue 1]

5. Affiliated Libraries representatives sitting on Library and LAUC committees, task forces, Councils, etc., should be encouraged to speak out on Affiliated Library issues and more consistently report back to their constituents.
[Issues 1, 6, 7]

6. Affiliated grant writers should consider including The Library as a stakeholder; The Library grant writers should consider including the Affiliated Libraries.
[Issue 1]

7. Although we would like to assume that invitations to Library-sponsored events and training sessions include Affiliated staff, to avoid ambiguity invitations to such events should routinely specify whether or not Affiliated staff are included. Special conditions applying to Affiliated staff should also be explicitly stated.
[Issues 2, 6, 7]

8. TALAG should ask Library to review its e-mail reflector system to determine if Affiliated staff (both academic and non-academic) may be included in 'allusers' as well as some of the focused e-mail reflectors, e.g., 'selector' or 'reference.' This will help inform them of any special projects being developed. TALAG should also use the Affiliated Library reflectors to communicate better among Affiliated staff:
Affiliated librarians: affil@library.berkeley.edu
TALAG: affil-ad@library.berkeley.edu

Affiliated librarians should be considered for inclusion in WAG since its work will affect the Web presence of their libraries.
[Issues 2, 9]

9. To help campus library staff educate themselves and our users about the circulation policies and procedures in Affiliated Libraries as well as catalog access to Affiliated Libraries' collections, we recommend the following:

The Library's publicity, teaching and public service activities should reflect the variation of policies and catalog access across the campus.

In addition, descriptions of campus-wide library services should include variations based on location. For example, although Library practice is that an NRLF request will be filled within two working days in most cases, for many Affiliated Libraries the average turnaround time is much longer because of the difficulties in transport service currently available, as most Affiliated Libraries deliveries go out from the Library Mailroom into the campus mail before arriving at the Affililiated Library. The Library's publicity about NRLF service does not address this difference.

To promote this ongoing awareness effort, TALAG (or another body, such as the LAUC-B Committee on Affiliated Affairs) in collaboration with the Public Services Council should sponsor an Early Bird or other event about Affiliated Library OPACs and access policies.
[Issues 2, 3, 5, 8]

10. The Library's Web site should continue to publicize the presence of Affiliated Libraries on Web pages and other media, and the reverse should be true for Affiliated Library Web pages.

Affiliated Libraries can help identify Library Web pages that should have links to their libraries, services, and current public service policies.

TALAG should maintain on the Affiliated Libraries Web site unit-by-unit policies on circulation, NRLF, and catalog access, etc.

TALAG should review the Affiliated Libraries web site for completeness (http://www.lib.berkeley.edu/AFFIL/). In addition, all Affiliated staff should be listed in The Library's Staff Web Directory.
[Issues 2, 4, 6, 7, 8]

11. The delivery of NRLF materials to Affiliated Libraries should be reviewed since all of the libraries have a shared goal of providing improved public access to materials. The Library is encouraged to negotiate a "memorandum of understanding" concerning the intra-campus delivery of NRLF materials to the Affiliated Libraries for which this is an issue.
[Issue 3]

12. To encourage more communication on shared public service concerns, issues that affect all public service points in campus libraries, including Affiliated Libraries, should be brought to the attention of the Public Services Council.
[Issue 3]

13. Any listing of libraries in the Development Office's Web pages should either include Affiliated Libraries or link to a page for 'other libraries' that would include all Affiliated Libraries. The consistent use of such a list, like the one included in *Bene Legere*, no. 60 (Spring 2002), could help portray the true diversity of libraries on campus.
[Issue 4]

14. The Library's Development Office needs to make it very clear that donations made to it are only for libraries that form part of their system. Donors should know that their donation will not reach any of the Affiliated Libraries unless specifically designated.
[Issue 4]

15. Affiliated Libraries need to articulate more clearly their staff and collection needs to their academic units in order to be highlighted as a priority in annual gift drives. This would make it easier for them to get the attention of potential donors.
[Issue 4]

16. The Library and Affiliated Libraries should continue to work towards a UC Berkeley union catalog, as recommended by the 2001 Task Force on GLADIS and the Affiliated Libraries (see http://www.lib.berkeley.edu/Staff/Admin/AffGlad/affglad-final.html for the final report). In addition, the Affiliated Libraries' use of The Library's automated circulation and catalog maintenance systems should be investigated by TALAG and The Library's Systems Office or Technical Services Department as appropriate.
[Issue 5]

17. When preparing merit, career status and promotion review dossiers, Affiliated librarians should be encouraged to be explicit about local constraints affecting their cases.
[Issue 6]

18. TALAG should advise the University Librarian about the particular peer-review constraints affecting their libraries.
[Issue 6]

19. Affiliated Librarians should be encouraged to request from the Academic Personnel Office redacted confidential letters in their dossiers, Including the letter from the University Librarian to the Executive Vice Chancellor.
[Issue 6]

20. LHRD should be asked to reserve a minimum of one place for Affiliated staff attendance at LHRD-sponsored training events and to invite Affiliated Libraries to participate on a space-available basis.
[Issue 6]

21. LAUC-B Executive Committee should address the inequities of administrative supplemental funding for professional development.
[Issue 6]

22. TALAG should ask The Library to invite Affiliated staff to participate in the Berkeley Technical Services Discussion Group (BTECH).
[Issue 7]

23. Supervisors should encourage non-academic Affiliated staff to participate in committee and Council activities, as a means of developing informal connections with Library staff.
[Issue 7]

24. Affiliated Libraries should consider creating a formal organizational structure to represent their needs and interests on campus. Such a structure would provide a unified voice to represent their shared concerns and facilitate communication with The Library by identifying one person who represents all Affiliated Libraries.
[Issue 10]