

Consultants' Report Regarding Kalmanovitz Library,  
UC San Francisco, April 18-19, 2005  
Consultants: James Curtis, Carol Jenkins, Judith Messerle

## INTRODUCTION:

At the request of Karen Butter, Director of the Kalmanovitz Library at the UC San Francisco Medical Center, three health science library directors having experience with renovation and collection management worked with the library staff and others to make recommendations regarding potential beneficial shifts of space within the library overall, and in particular regarding a proposal to convert space in the Kalmanovitz Library to classroom/study room purposes. This report documents the charge, observations of the consultants and the recommendations derived following a site visit, review of a variety of documents about the library and conversations with numerous groups at the University.

The consultants found all parties to be very forthcoming and eager to find a solution to the space needs of the institution. The importance of the Kalmanovitz Library and its collections made the recommendations difficult to identify but after much discussion, we believe that there is potential for two avenues of work. First, we believe that 'fast track' efforts to clear part of a floor are possible and could, with relative speed, provide enough space for much needed small group rooms. More importantly, we believe that there is sufficient interest and need for the administration and the library to jointly develop strategic long range plans that will make the library even more closely aligned with the changing goals of the schools. These plans could result in further changes that may or may not be consistent with 'fast track' decisions. Therefore if the institution proceeds with a 'fast track' solution now, it will be important to consider the impact of these actions on future planning.

What follows is the detail of our deliberations. We have tried to minimize the cost and work involved but if the 'fast track' model is chosen, it is likely that costs will be much higher (because of multiple moves and multiple processing) and that users will be more frustrated as materials will move several times.

That said, we believe that the library administration has positioned the Kalmanovitz Library well to move forward with a distributed model that could go far in bringing services closer to the user base. Partnership with educators to enhance the educational mission of the schools is a logical step for today's health science libraries and is encouraged, if the right

management models can be put in place. These models should ensure that the expertise of ALL parties (including library educators) is brought to bear on problems and opportunities, making the proposed changes more than just reallocation of space, but a true collaboration.

## I. CHARGE:

The Library Space Utilization Proposal outlines the work of the consultants as follows:

“To assist in evaluating the Library’s current utilization of space, finding ways to reconfigure space to better support current functions and studying the possibility of operating the library at Parnassus within reduced space.

Specifically the vendors are charged with:

1. Suggest specific methodologies for determining space utilization for library functions, including identification of appropriate drivers for calculating space needs.

2. Visit the UCSF campus during one concentrated workshop period and meet with the Library administration, the Advisory Committee on Library Space Planning and members of campus space planning committees. During this visit the Vendors shall:

- \* Provide a general overview of recent and future trends in library/information use, instructional computing support, service delivery, operations and facilities among Health Science Libraries.

- \* Describe the operations and space configurations at other health science libraries so that UCSF’s use of library space may be benchmarked against peer institutions.

- \* Review services and operations at other UCSF libraries (i.e. San Francisco General Hospital, Mt. Zion Medical Center and Mission Bay, including visits to those sites.

- \* Review the Library’s current vision and service delivery/operational practices in light of new trends and best practices in the use of health sciences libraries.

- \* Evaluate from a fresh perspective the Library’s utilization of space at all UCSF campus sites.

- \* Recommend how current functions might generally be reorganized and/or redistributed to use space more effectively.

To assist in the work of the consultants the UCSF Library agreed to:

- 1) Document the current distribution of space by function throughout the Library system at all major UCSF campus sites (Parnassus, Mission Bay, Mount Zion, and laurel heights
- 2) Supply the consultants with advance data on space and functions.
- 3) Working with suggestions from the consultants gather data from user community through methods such as focus groups and/or structured interviews to assist in determining their expectations about changes in their use of library space.
- 4) Use tools suggested by the consultants and perform new space need projections for the various key library and information management functions.
- 5) Perform traditional projection of space need using existing U.C. library space standards for purposes of comparison.
- 6) Identify, if feasible, where space at the Parnassus Library might be released from specifically library use without excessive harm to library services and operations, and recommend how such space might be transformed for compatibility with the Library
- 7) Document the outcomes of this study.

## II. PROCESS.

Three consultants were hired by UCSF to complete the charge above. They are as follows:

James Curtis, Director, Savitt Medical Library and Information Technology Services, University of Nevada School of Medicine. Mr. Curtis has been involved in numerous library facility building and renovation projects, and was Project Manager for the total renovation of the Health Sciences Library at the University of North Carolina at Chapel Hill.

Carol Jenkins, Director, Health Sciences Library, University of North Carolina-Chapel Hill. Ms Jenkins has just completed a major \$13 million renovation of this Library that involved temporary relocation of staff and collections within and outside the building during construction.

Judith Messerle, Director, Countway Library of Medicine, Harvard Medical School, Retired. Ms. Messerle worked on the planning and the completion of the \$26 million renovation of the Countway from 1994- 2000.

Planning materials and use documents were sent to the consultants by the library for review prior to the planning workshop April 18-19, 2005. These included a UCSF Library Conversion Draft Study dated May 18, 2004, and UCSF Library Space Utilization Data dated March 2005. A conference call, convened by Karen Butter, University Librarian the week prior to the event

reviewed issues under consideration as well as the agenda and expectations for the visit.

The consultants convened for the site visit on April 18<sup>th</sup>. They toured the main library and visited the following outreach sites: San Francisco General Hospital and the Mission Bay. In addition, the consultants met formally with the following groups:

- Advisory Committee on Library Space Planning
- Library Senior Management group
- Academic Senate Library Committee
- Parnassus Planning Group

Consultants made formal presentations on the renovations of the University of North Carolina Health Sciences Library and the Countway Library of Medicine (Harvard Medical School) as well as provided an overview of current thinking on library space utilization. Throughout the two days, the consultants responded to individual and group questions about the library of the future and potential for space utilization.

### III. **OBSERVATIONS** (includes both issues and opportunities)

#### A. **Overall:**

The Kalmanovitz Library is one of the great academic health science libraries in the country. Its collections provide a broad heritage documenting the history of medicine and health sciences. The building itself is cathedral like beckoning those who seek quiet reflection. Its reputation across the library community is well known and admired. Under Karen Butter's leadership, library staff members have been able to accomplish much, partnering with others to provide specialized services in a number of arenas.

Outreach library services at multiple sites (including the San Francisco General Hospital, Mission Bay, and Mt Zion) provide distinctive services to segments of the community. This effort offers a platform for broadening interaction with constituent groups.

The layout of the Kalmanovitz Library building, as it stands today, reflects the pre-internet era in which it was designed. It was a state-of-the-art facility in 1990, and reflected the best thinking of the 1980s. In addition it was designed as a monument to learning and scholarship, and included impressive ceremonial space and generous passage and vista space, space that is not part of the assignable square footage. It is quite certain that the design could be updated to match current practices of health science

librarianship and user behavior, while maintaining the esthetic qualities that the community highly values.

## **B. Vision and Campus Culture:**

Karen Butter and her senior staff have been working on a draft vision for the library. The vision has a strong view of the future and is in keeping with that of most academic health science libraries. It does not yet have the benefit of full discussion and integration with the campus mission and strategic view and is weakened by the lack of parallelism with the communities that it serves. This vision, once affirmed by the campus community, should be the principal guide to determining how best to allocate space within the library.

The space constraints for UCSF will continue to affect where and how space is provided to support the campus' vision and mission. With the campus physically distributed over several locations the library has an opportunity to develop services customized to serve the clientele at each site, while maintaining core activities at the main Parnassus location. For example, the library at Mission Bay Genentech Building could become a site for special bioinformatics library services (the library's draft vision calls for partnering with informatics research and teaching programs). The libraries at San Francisco General Hospital, Parnassus, and Mt. Zion could expand clinical information services adaptable to all sites. In this distributed model, the Kalmanovitz Library provides core support for all other sites in the system, while also serving its local clientele with a full suite of services. Moreover, it provides the library a way to become more fully integrated into the fabric of the institution. People may continue to think of the library as a welcome sanctuary; but they may also see it as an essential partner wherever the institutional activities are occurring.

Another factor to consider is the impact of technology on the campus' evolving vision. Technology increases the potential for success of a distributed model by enabling systems in which ideas and information move, but people can stay where they are. It also suggests that the function of the library can expand to facilitate information exchange and information use, whether for education, research or patient care, rather than to be primarily the information repository. Thus a new model for library services may evolve from two binding threads: one is ubiquitous technology allowing full access to UCSF knowledge resources and services wherever the users may be; the other is the physical distribution of people and services that characterizes UCSF. Persons in locations other than Parnassus may enjoy access to the library's digital collections and services while also benefiting from library

services in their locations that respond to their specific needs. This model is discussed more fully later in this report. Its relevance here is to illustrate that on a distributed campus, a distributed library model may be more successful than elsewhere. It takes advantage of a campus culture that already exists. It also suggests a framework for addressing the current issue: how to gain space at Parnassus for education while extending the library's functionality.

### **C. Collections:**

The collections of the UCSF library are extensive and well known in the world of health science libraries. They are at once the best asset of the library and its biggest responsibility.

Research libraries such as the Kalmanovitz and the Countway Library at Harvard were built around collections. Accrediting bodies, faculty and librarians felt strongly that the size of the collection was a strong indicator of institutional commitment to scholarship. The larger the collection, the more important "learned activity." Faculty was drawn to institutions with large library collections. Library directors felt the mandate to collect heavily and to report statistics that reflected the depth of their collections. Having materials on site was a boon to the student and faculty member who could complete scholarly research without having to wait for an interlibrary loan from another institution.

New technologies began to shift that model and over the last decade, increased electronic access has made it less imperative that all materials be physically at hand. Today's interlibrary loan with technologies such as Ariel and ILLIAD can provide 24 hour delivery of many materials. UCSF's access to significant numbers of electronic journals and books makes it possible to consider an increased number of materials for offsite storage.

It is important to note that all health science libraries are seeing multiple patterns of use from their clients. While electronic resources are an important asset for those needing facts and quick information at the bench and the bedside, scholars and those who are in the learning mode find print materials essential for their work. These multiple preferences mean that libraries must walk a careful line in determining to provide online sources or print sources and in determining which materials could be moved offsite without destroying the integrity of the library for the scholar.

Health science research libraries are still the "bedrock" for the world's health care practitioners, researchers and scholars. A recent study of overlap in

collections between the National Library of Medicine, the New York Academy of Medicine and Countway showed one third of the collection at each institution to be unique. These libraries, and the Kalmanovitz Library should be included among them, cannot discard volumes without great care lest the record of science and medicine be lost.

Great libraries bear the weight of responsibility to the collective international user community because a subset of their holdings is unique in the world. That burden of stewardship affects all decisions that are made regarding the collections.

A second burden that health science libraries with large collections must manage is that of cost. We have been balancing the needs of our users for newer material, particularly electronically accessible materials with the known high costs of managing existing collections. And while most of us have placed priority on the current needs, we have been making difficult decisions regarding retention and offsite deposit of materials over the last decade.

Utilization data can identify candidates for transfer offsite; scope definitions can identify those materials that were collected that are no longer within the “scope” of the work of the user community. The latter materials can be candidates for de-accession or relocation to another more appropriate library. (E.g. Older materials were observed in the collection relating to the chemistry of photography). Further, as is often the case with larger libraries such as the Kalmanovitz, duplicates may exist in different parts of the collection. Weeding of these materials is a possibility that would free up space.

There are also numerous special collections that are unique but may not be central to the mission of the library. These should be examined carefully to determine whether or not they are candidates for the repository. Donor implications should be included among the factors for considering these collections as well as the intellectual importance to the community.

It has been noted that removal for deposit, withdrawal or relocation is not a simple or inexpensive issue. It is highly labor intensive and requires intellectual knowledge of the collection and a systematic methodology for action. Individual volumes that are candidates for removal need to be first identified by someone who understands the use data and understands the user need. Once identified, materials need to be evaluated for disposition. The bibliographic record will need to be checked to determine if it is held elsewhere in the UC system or held nationally. The volume must be physically moved from the stacks, marked for appropriate storage (de-accession or relocation) and physically organized for removal. In addition,

the bibliographic records for each volume must be corrected in the database (catalog) to assure that the record of the library matches the reality.

Duplicate identification requires different processes which include determining which are duplicated, examining materials for best copy, and updating the bibliographic records. Again, this is a very labor intensive process which usually involves extensive problem-solving as the same volume may have been cataloged differently at various points in time. Missing volumes creates another set of problems to solve. Materials that might be moved are often not contiguous and result in freeing up space in various parts of the library. Work to refine the collections could result in shifting the entire collection to open up the broad expanse of space that would be required for the proposed group study rooms.

Yet another consideration for the Kalmanovitz Library is its responsibility to the UC library system. Agreements and policies exist that will affect how this library evaluates and disperses items in its own collection. On the plus side, there is a system commitment to a repository approach and 'last copy' policies that will be helpful. On the other hand existing agreements may limit this library's flexibility somewhat.

Despite the intense difficulty of redefining and weeding collections, almost all of the larger health science libraries have been forced to tackle the issue so that space could be converted to other important library functions. The accurate record of health sciences and the ease of use of knowledge based resources at UCSF will be dependent on the care that is given to choices regarding disposition of materials. The business plan (spelling out staffing requirements and materials movement for this undertaking) will be as important as the intellectual planning for the overall construct of the revised onsite collections.

#### **D. Services:**

The Kalmanovitz Library provides library services that are similar to most academic medical libraries. Notable, positive exceptions to this general statement include but aren't limited to the following:

- Center for Tobacco Control Research and Education (partnership)
- Center for Knowledge Management
- Biostatistical Consulting Services (partnership)
- Center for Instructional Technology
- Interactive Learning Center
- Computer Classroom
- East Asian Collection

As stated above, physically the Kalmanovitz Library building, opened in 1990, reflects library practice of the 1980's. Some space changes have been made to keep the building up with the times, and space has been carved out of the building to accommodate added functions, some closely related to the library, such as the Center for Tobacco Control Research and Education, and some less well integrated, such as the area on the first floor given to the Laboratory for Radiological Informatics.

New user needs, changing institutional vision, and altered patterns of librarianship imply a need for an overall rethinking of library space. For example, current practice calls for library spaces that promote staff visibility and user interaction; and for more formal and informal teaching-learning spaces. Many libraries are planning to reallocate space formerly dedicated to collection storage, to spaces for collaborative information-based research, learning commons, and the like. Both the Countway Library and the UNC Health Sciences Library, projects presented during the consultants' visit, are examples of this change. This major rethinking of library space at UCSF would require a campus commitment to strategic planning for the library and could result in a redesign of library work space and service points, user space, and collaborative space. A redefinition of core central service and the potential of distributed specialized services and partnerships could result in significant realignment of space in accord with a new vision.

#### **E. Staffing:**

It was not the charge of this group of consultants to examine staffing. It is sufficient to observe that the mission and functions of the library drive the staffing plan, and that the changes to these will be reflected in changing staffing patterns and space needs. However it is important to reiterate that any work with collections is likely to require additional staff (both librarians and support staff). The work is complex and detail oriented, yet essential to maintain both access and understanding for the user searching for materials.

Any changes to access/egress from the library demand full security staffing. At the present front desk, circulation staff members provide security check points when alarms are triggered by materials being inappropriately taken from the library. Any new entrance to the library would need to be staffed either by library or security personnel on a continuous basis during times that the entrance is open.

## **F. Space:**

One task for the consultants was to attempt to determine appropriate space utilization for library functions, including appropriate drivers for calculating space needs. This is difficult to do without further work that would require much more in depth investigation and analysis. Two areas in which we are focusing relate to the size of the collection and space devoted to housing collections, and study space, both in terms of open seating for individuals and group study facilities. Of course, there are many other functional areas within the library building and these will be discussed as well. The following analysis describes current space usage and suggests areas for potential change.

As stated earlier, the Kalmanovitz Library's cathedral like space takes full advantage of the view from the side of the mountain. Time and again, the consultants heard about and felt the impact of that dimension of the library. Few libraries in the world have the luxury of such an aesthetic and we heard from individuals that the feeling of solitude and grandeur was particularly important to them in their scholarship.

The entry to the library and the security point is on the third floor. Given this design, the orientation of the user is to enter on the middle floor of the building, and then to proceed downward or upward, depending on the purpose of the visit. The following discussion will look at the floors in this same way, moving downward from the third floor to floors two and one, then upward to floors four and five.

There are two main service points, an information desk and a circulation desk, located near the main entrance to the library on the third floor. These are imposing desks located on either side of the entry foyer. They are not close enough to each other for easy communication between them, and users must chose the right point to conduct their interaction with staff. Staff offices located in back of the desks, and the information staff offices in particular, are somewhat hidden away and not terribly inviting for ready access by users to consult with staff. The Hearst Reading Room is a convenient space and it is located adjacent to several group study rooms. Documented use of these rooms, including the Hearst Room, seems lower than might be expected on average, but is similar to usage of equivalent areas on the fourth and second floors. The main floor area, which provides open seating in a mixture of tables, carrels, and soft seating, is the most heavily utilized space on this floor and throughout the library. This floor also houses the current journal stacks which contain fewer print titles than they were designed for, the reference collection, and reserves. All of these physical

collections are seeing decreased use and utility as electronic access replaces print. This floor also is home to the Center for Tobacco Control Research and Education. This is a function with important ties to the library's programs. In many ways the third floor expresses the grand sense of space and openness that typifies the library's design. This is reflected in the relatively low ratio of seats to square feet, with large spaces left as nonassignable.

About half of the second floor space is given to shelving of journals from 1975 to the present. Perhaps one-third of the floor is taken up by the Interactive Learning Center, a computer classroom, and related functions. The Learning Center in particular is not highly visible and reflects a dated design, has low visibility both to those outside the area and within the space, and is rather dark. At peak times usage of this area is fairly high, but on average it is not as great as might be expected. The remaining area on this floor is occupied by the Livingston Reading Room which contains 80 seats in a mix of carrel and table seating. Usage of this area is low on average at 14%, and only 39% at maximum. Some parts of the second floor of the library seem to be areas that might be used for other purposes.

Approximately one third of the first floor houses compact shelving containing pre-1970 books, pre-1975 journals, and some reference collections. There is some room for more materials in this area, and the age of these collections makes them candidates for potential weeding or transfer to off-site storage. Other functions housed on this floor include the UCSF archives, Resources Management, The Biostatistical Consulting Service, the Center for Knowledge Management, and administrative offices and conference rooms. There are only 11 seats for public use on this floor. The Resources Management area seems rather dark and cramped. Activity levels of the BCS and CKM are unclear, but these functions are very important and could be key to the future mission of the library should it choose to move increasingly into knowledge management. Relocation of these services to a more prominent location, such as the third floor, might be an attractive alternative under certain circumstances.

Over 3,000 square feet of the first floor is given to the Laboratory for Radiological Informatics. The use of this facility might be investigated to see if it justifies the space it occupies. Its relationship to the library's programs and services seems tenuous. This area might be suitable for increased compact shelving should the need for it arise, or for other purposes such as additional user space. (We note that the UCSF Library Conversion Draft Study May 18, 2004 calls for this and other non-library units to vacate the library if conversion proceeds, opening up about 6,000 square feet of space.)

Moving up from the entry level to the fourth floor, about two-thirds of the space is taken up with shelving for books from 1970 to present. This floor also has 12 faculty studies and 6 group study rooms. There is open table, carrel, and lounge seating for 190. According to recently conducted surveys all of these user spaces are very popular with users. A final feature is a browsing room. This room is not maintained or used as it was originally designed. A potentially important fact about the fourth floor is that it is on the same level as a plaza area between the library and an adjacent multiple use and student services building. If another entrance to the library building were to be created, then this is the floor in which such an entrance could be added. This possibility has been noted in the UCSF Library Conversion Draft Study mentioned above. However, an entry on this floor may be precluded due to issues related to access for the disabled.

The fifth floor houses mostly special collections. The Lange Room houses a smaller collection of the Lange books, but is mostly meeting and ceremonial space. In 2003/4 it was reserved 118 times, or an average of 2.26 times per week. When not reserved it provides some public seating. The Blumenthal Room contains an important East Asian collection. This collection appears to be static and has no curator with special expertise in the area. There is a substantial space given to history books and journals, an office and work area for archives and special collections, and a closed collection of rare books. There is one "loaned space" on the fifth floor that is the School of Medicine office of Educational Technology. This space seems unrelated to other functions on the floor, and not closely tied to the library's programs. An issue related to future uses of this floor might be the capability to control access to it and to isolate it from the fourth floor. Most areas of this floor could be locked off if required, except for the history books and journals stacks area.

Given the information available, one may make several general observations related to library space. Throughout their modern history library size and allocation of space have been driven by collection size and anticipated collection growth. Since the advent of widely available electronic resources the current thinking is that this no longer need be the case. In many instances libraries are renovating or new libraries are being built in which various service functions and learning spaces have become the drivers, essentially space dedicated to users rather than to collections. The current distribution of assignable square feet in the Kalmanovitz Library reflects the older model of library design. The space distribution works out to 50% for collections, 28% for user space, and 22% for staff functions. We feel that a redistribution of library space among these three functions could be warranted. However, it is important to emphasize that space for print collections will continue to require the most significant portion of library space for the foreseeable future. While there is no standard space

distribution, for comparison purposes the realignment of space at UNC post-renovation is 32% collections, 39% user space, and 29% for staff functions. This realignment was accomplished within an existing building footprint, as would be the case at UCSF. In the renovated Countway, however, space allocation percentages mirror those of the existing Kalmanovitz model.

Is the individual user seating provided in the library appropriate in numbers and types to the demand? Are the user facilities in terms of current study and work patterns of the right kind and capacity? Again, this is difficult to measure without specifically designed studies around these questions. We observe that this library's gate count has declined since the opening of the new library, but it remains one of the most heavily used facilities among all academic health sciences libraries. In general, libraries are showing somewhat lower use as more resources become available electronically and can be accessed from outside the library. It also is possible that the Kalmanovitz Library would show even higher use if it provided more of the kinds of spaces users want, such as group studies equipped with learning technologies; information commons areas; and the like.

University of California standards on user space may indicate that the UCSF library is short of the recommended space and seating. However, based on the use study figures provided to the consultants the capacity of the library to accommodate users appears to be in excess of the current demand. There may be implications in this fact for overall space allocation. It may mean that the number of total seats can be reduced, or that the types of seating and working areas might be changed. Most of the areas in the highest demonstrated demand are individual seating areas. That may be where the demand is, or it may be that those wishing to pursue solitary study tend to come to the library knowing that they can easily find the kind of seat that they desire, while those wishing to study in groups elect to go elsewhere because they are not confident of finding a room available. The current policy that the fourth floor is reserved for quiet study with no laptop computers allowed may inhibit users who might feel that studying without a laptop is like reading without a book. In fact, a "no laptops allowed" policy may even inhibit library users from accessing the library's own electronic resources. On the other hand, this could make the area popular as library users seek refuge from those areas of the library that are activity intense.

The library has multiple group study rooms which are very attractive to users. Libraries today find growing demand for group studies as curricula emphasize group learning activities. Increasing the number of rooms for use as collaborative spaces for staff and users, students and others would be a very positive undertaking. Some campuses choose to encourage collaboration by creating spaces that attract people having a shared purpose. Modern day

libraries support collaboration by providing not only the space but the staff, technology and support that helps such efforts succeed. This is true whether the spaces are group studies or high-tech media labs or scientific collaboration centers.

The user studies that the library is currently conducting will shed some light on these observations. The consultant team has not yet reviewed the results of these studies.

#### **IV. Recommendations**

##### **A. We recommend that the Kalmanovitz Library's programs and services be congruent with evolving library practice and the broader purpose of the institution.**

Today's libraries must be strongly linked to the mission of their parent organization. We recommend that the institutional strategic planning effort include the UCSF Library and institutional knowledge management as part of its deliberations. We encourage addressing the library's role to support knowledge generation, knowledge collection, organization, access, delivery and preservation. We strongly recommend building on the strengths of the library including its physical space, vast collections, and leadership activities with sponsored projects like the Tobacco Papers, Asian Medicine and others.

This vision should reflect the needs of the parent institutions and individual user groups, including students, residents, etc. The vision should serve as the guide to determining the use of existing and future space of the library; the decisions should be strategically rather than operationally focused.

Strategic planning is needed at the institutional and library levels to articulate the vision for the library in the organization. This vision should guide determinations about how existing or future library space is used. As a participant in this planning effort it will be up to the library to promote innovative alternatives that help others consider the possibility of a transformed library environment. Three examples of new library roles were briefly discussed during the consultants' visit. The first is the role of the library as 'neutral' space to promote collaborative teaching, learning, and research, bringing to bear advanced information technologies and skills from the library. The second is the role of the library to provide expert information services at the work site, supporting teaching, learning, research or patient care. A third role is leadership in knowledge management for the institution.

None of these roles is mutually exclusive; in fact they have natural linkages. The extent to which the library chooses to develop these or other roles will depend on its assessment of how its strengths match with institutional needs and opportunities.

**B. Based on the institutional need for education space, and our review of the Library's services, use, and impact, we recommend that the Kalmanovitz Library consider converting some space to educational purposes. The location within the building to be repurposed, the square footage to be converted, and the assignment of new functions should be consistent with the Library's core purpose, make optimum use of educational technologies, maintain the security of library resources, and allow flexibility to evolve to meet changing institutional needs**

This course of action is appropriate only because the library has a natural affinity with education, and other uses, such as student services, would not be advisable. Such a move could create core, common purpose space that could serve a variety of educational needs as the institution's specific space needs evolve. Appropriate uses would include group studies, and reconfigurable spaces. Static medium to large classrooms which would be used, albeit intensively, for a relatively short period on a weekly and annual basis during a few, concentrated hours would be a less appropriate use for repurposed space. Traditional classrooms sit idle for much of the time, lack flexibility of arrangement and purpose, and may not suit future educational methods.

In order to change the use of space for whatever purpose the Kalmanovitz Library must determine where to relocate collections and services now occupying the space. It is likely that selectively removing items from the collections and/or moving them to a repository will be necessary. There will be significant costs involved in relocating library collections and services

Should the Library repurpose space in the building for education, careful attention must be paid to how this space is managed. If management is shared between the Library and other campus units, management issues should be worked out in advance. These issues include such things as access and security policies; maintenance costs, service roles, and communication to users.

Other measures affecting other parts of the building are outlined below in an appendix. Clearly an overall, comprehensive plan for dealing with the collection is key to repurposing space, as is a clear vision that is aligned with that of the institution.

**C. We recommend that as part of the strategic planning effort recommended above, the Kalmanovitz Library further develop a distributed model of library services that builds upon its existing services and relationships at Mission Bay, SFGH, and Mt Zion while retaining the library at Parnassus as the hub.**

The distributed model offers the opportunity to tailor services to the needs of a defined clientele, while retaining the library hub at Kalmanovitz. For example, the ongoing role of the library in the Genentech Building seems unclear once a new library opens in the new student services building. The idea of an ‘information commons’ area has been suggested there. Since the Genentech Building is dedicated to research, one role for that library could be to develop more sophisticated research support services for this clientele in that building while developing the information commons in the other building. Special services might include research information specialists in context, working in partnership with scientists; specialized services promoting the use of visualization and other technologies (see [www.hsl.unc.edu/Collaboration/collaboration.cfm](http://www.hsl.unc.edu/Collaboration/collaboration.cfm)); or knowledge management services involving research data. An example of this model is being developed in the Library at UNC, based on an evolving concept of “futures collaboratories” at institutions including the University of Illinois, Argonne National Laboratory, and UCLA. A critical success factor for the Library will be its ability to develop a program “that spans the entire scope of the library’s knowledge resources, programs, services, expertise, infrastructure, spaces, and facilities”; and that takes advantage of evolving communities of practice in multidisciplinary areas like genomics. Clearly such services will require highly trained library staff. (See: Moore, Margaret, Barrie Hayes, Wallace McLendon and K.T.L. Vaughan. "Developing an Interdisciplinary Collaboration Center in an Academic Health Sciences Library." *Medical Ref Serv Quarterly* 24(4) Winter 2005. *in press*)

This is just one example of a distributed service that makes the library an essential partner to a specific clientele. If successful, the model could be extended to other sites. It might be possible to develop a similar model at SFGH, Mt. Zion, or even at the Kalmanovitz Library that focuses on specialized research or clinical information support services. Some health sciences libraries are developing “information specialist in context” services that respond to clinical or other information needs on the fly; lead to customized information portals developed by the library that integrate information from disparate sources; and provide other services specific to the work environment and clientele. These services also require expert librarians with advanced information management skills, and time to focus on the needs of specific clientele. The overall model that emerges from these examples is one of a library that is fully integrated into the fabric of the institution, providing on-site services that match local needs as well as the

comprehensive information support needed by a world class research institution.

**D. We recommend that innovative educational technologies be considered when planning changes to the library building, for their potential to enhance education services and spaces. Such technologies can help transform the Library as a core education facility.**

Technology enables site specific services described above to be widely shared with various communities on and off campus when desired. It also suggests new uses for library spaces at all sites, but especially at the Kalmanovitz Library. Innovative learning environments are beginning to include such technologies as ‘smart walls’, ‘smart tables’, and ‘smart chairs’ for instance, that allow interactive teaching and learning to occur anywhere they exist. It would not be difficult to imagine a Kalmanovitz Library building that included such technologies throughout its spaces, in addition to more traditional learning labs and seminar rooms. As libraries plan transformed learning spaces it is important to recognize that the “born digital” generation, (present and future library users), are comfortable with a wide range of mobile technologies that allow them to pursue information tasks anywhere, anytime, and indeed they expect this capability. At UNC, for example, people use laptops and IPODs in the café, lobby, soft seating and carrels. They meet in small groups in open seating areas, or go to study rooms to hook into plasma screens. They soon will be able to videoconference from mobile or stationery devices. Health sciences curricula are becoming increasingly reliant on digital content, virtual patients and more. This content should also be easily accessible from within the library. Some libraries even support high-tech clinical skills labs. Kalmanovitz Library’s knowledge management expertise can help extend access to unique materials like the tobacco resources, as well as to images used for teaching and learning. We are impressed by the work already underway in these areas. As an essential partner in the institution, the library should continue to play a major role in supporting its educational mission by making best use of educational technologies to support instruction throughout the institution.

## **V. Strategies**

There are significant reasons to reconsider how to utilize the space in the Kalmanovitz Library to help achieve the UCSF vision and mission. This process may require a phased approach, and the specific actions taken will depend to a great extent on whether the need for space is the primary driver; or planning or funding is a primary driver. If space is the primary driver, and time is of the essence, a “fast track plan” presented below may be worth

considering. However, we recommend taking the longer range, more “strategic approach” also presented below, if time and space needs permit.

Strategic Approach:

**A. Solidify the vision, building on the library’s knowledge management role in the institution, and seek institutional adoption of this vision.**

It would be worth renovating the entire library if feasible, since changing practice has created unused space as well as space that is not used effectively and efficiently.

**B. Carry out a thorough collection analysis to release enough volumes to repurpose space in the Kalmanovitz Library equivalent to about one floor; and to create a long range policy to guide the Library’s retention of its print collections into the future.**

This will require time and resources, but it is the only way to develop a long term strategy for managing a large print collection that contains many unique items worth preserving forever, as well as other items that are not necessary to retain when their space is needed for other uses. Another consultant with collection analysis expertise could be helpful in accomplishing this. The results will be pivotal in shaping the library’s future.

**C. Broaden the dialogue among library users and stakeholders.**

There is an immediate need to collect information about users’ current and anticipated information uses; and their views on what library services/spaces are most important. The advent of electronic resources and indeed, technology in general has changed the way users think about, access and use information. Wireless technology, text messaging, beamed video are all changing the ways in which learning occurs and information is retrieved and managed. Younger generations think about information in different ways than those who grew up before the introduction of the internet. Methods of instruction, access to information about the patient, and new ways of manipulating research data all signal changes in physical use of the health science library of tomorrow. Gathering information from the variety of user groups that the library serves, will be important in determining how best to configure and use library space.

Beyond this, it is important to share the news of the Kalmanovitz Library’s significant accomplishments in digitization of unique archives, and more. It is important to educate the user community about the library’s strengths, enhance the library’s credibility and influence however possible. It would be worth hiring a public relations professional to develop a marketing program for the library.

**D. Determine what space can be made available in the Kalmanovitz Library that can accommodate expanded educational functions while staying true to the Library's core purposes and positioning it to adopt new or expanded roles.**

It is our understanding that several scenarios have been considered to identify spaces within the Kalmanovitz Library that meet these goals, so we make no recommendations about which space would be most appropriate. We believe there are several possibilities that could meet these goals and expect that the decision will be based on cost, timing, and other factors as well. For the robust future of the Kalmanovitz Library itself full consideration should be given to the library vision of the future, user need, traffic flow, logical arrangement of materials and operational efficiency.

The attached appendix constitutes suggestions for how the Library might move forward with space reassignment regardless of which space is finally chosen. These represent possible scenarios and the specifics should be carefully considered for their merits and their relative contributions to either the short term or longer term goals of the institution as a whole and of the Kalmanovitz Library in particular.

Respectfully Submitted:

James Curtis  
Carol Jenkins  
Judith Messerle  
July 8, 2005

Attachments:

Fast Track Plan  
Article by Moore et al.

## Appendix

“Fast Track Plan”:

**1. Create space quickly by removing collections.**

Clear space in the library as quickly as possible by arranging to send volumes to an off site repository. Use scope as the first criterion, and date as the secondary criterion for identifying volumes to remove. If use data is available this may also be worth considering. This would precede the deliberate collection analysis recommended above, and might require moving some volumes more than once. This could involve moving older volumes on the first floor to storage, creating space for newer volumes to come downstairs. Maximize the availability of compact shelving on the first floor, and fully utilize the space for collections.

**2. Identify off site storage space for items removed from the collection, unless they are weeded.**

Karen Butter has indicated that storage space in the off site repository currently used by the library may not be available immediately. Preferably space in this repository could be reserved; otherwise alternative storage space will have to be identified. Any offsite space should provide quick and accurate retrieval of materials that might be needed by users.

**3. Repurpose space gained for educational purposes, bearing in mind these premises: the need for flexibility in space configuration; the need to maximize the use of technology for interactive teaching and learning; taking opportunities to expand the Library’s educational role; and addressing how to manage shared educational functions and spaces.**

As part of the “fast track” approach it may be possible for the Library to experiment with new education spaces and services as the institution’s strategic planning efforts are occurring. For example at UNC the Library installed a multi-media development lab in one small space prior to its renovation and evaluated its success before committing more space and resources to it once the full building renovation began. Kalmanovitz Library may identify similar opportunities to “test drive” options like media-enhanced learning spaces for students.

Repurposed space should be carefully thought through from a management perspective. Without attention to this detail it will be unclear who has responsibility for the equipment, scheduling, security, and maintenance of the area. Because the library building is perceived as a whole by users, they will assume that the library is responsible for everything within the walls. Careful attention to these details will avoid

major problems in the future. Should these activities be taken on by the library administration, appropriate resources should be added to the library.

**4. Relocate non-core services to locations outside the library.**

Determination of what is “non-core” will require staff and user input. Candidates for services to be relocated would be at a minimum those that can be carried out under the distributed model outlined above, and those that are not well connected to the mission and functions of the library.

On the first floor consider the possibility of relocating the Laboratory for Radiological Informatics so that the space could be recovered for library use, most likely for collections. This may be neither politically nor financially possible, but should be explored as the library would be proposing giving up substantial space, and this space could probably support additional compact shelving. This assumption would need to be confirmed

**5. Repurpose spaces elsewhere in the Kalmanovitz Library to support its core mission, giving priority to uses that Kalmanovitz users highly value**

The second and fourth floors appear to provide the best spaces for potential repurposing for educational uses. On the second floor the Livingstone Reading Room could be converted to group study, meeting, or classroom space. The Interactive Learning Center could be redesigned and expanded. Extensive stacks space could be cleared and changed to other uses as well if the collections housed there could be relocated.

The third floor could be extensively redesigned along lines deriving from the library’s mission and directions for the future. If the library wished to play a greater role in instruction and collaboration around knowledge-based resources, perhaps an expanded knowledge management role of its own along the lines of Charting the Future, the third floor could be the space in which to carry out these new roles. [see: *Building on Success: Charting the Future of Knowledge Management Within the Academic Health Center*. AAHSL Charting the Future Task Force, Association of Academic Health Sciences Libraries, c2003.

[http://www.aahsl.org/document/Charting\\_the\\_Future\\_viewable.pdf](http://www.aahsl.org/document/Charting_the_Future_viewable.pdf)] For example, the Hearst Reading Room and the group studies could serve as the library’s instructional and learning laboratory space, multi-media development space, collaboration space, project space, etc.

The rest of the floor could be updated and the desks down-sized to human scale and perhaps combined. The office spaces might be opened up and the whole area labeled D, B, and E on the floor plans redesigned. A

popular approach today is to combine service desks into one single service point, thereby reducing confusion and enhancing user access. The physical single point of service in some ways mirrors the virtual point of service, the library's web site. The reader space around the journal stacks and on the Irving Street side could be made into highly attractive and usable areas to either read or use laptops. A mixture of seating types might be advisable and should be maximized as this would be a high use area if previous use patterns continue, and because the area is on the library's entrance level.

**6. Maximize flexibility in the building to meet changing needs over the next few years by creating easily adaptable spaces**

Wherever possible utilize interior partitions, design and furnishings that will allow for future alteration of areas that may be the subject of subsequent change in function. This is a shorter term response to an environment that is likely to undergo change as strategic decisions are reached down the road.

**7. Use compact shelving where possible to optimize use of space in the building for collections**

The potential addition of compact shelving will depend upon an engineering analysis of the possibilities for placement of such shelving in areas that will carry the load. The first floor, which already has compact shelving in both the archives and collections areas, is the most likely to be able to support such loads. That is one reason for suggesting above that the relocation of the Center for Radiological Informatics should be considered.

**8. Retain and refurbish the ceremonial spaces users value**

The feasibility of isolating and securing the fifth floor should be investigated. Provision for the security of any library materials remaining readily accessible on the fifth floor must be seen to. It may be necessary to relocate these materials to within the lower library floors. Presumably all other areas of the fifth floor could be secured. These include the Blumenthal Room, the Lange Room and the Rare Books areas and offices.

The Lange Room could be essentially the same in function as it is now. We recommend refurbishing this room and considering use of catering facilities that might serve it and the Blumenthal Room.

The Blumenthal Room seems clearly not to be used as designed. Consider removing its collections, and repurposing the room, perhaps using it as an on-campus meeting place for faculty. It could become a home-base for them when away from their offices. It could be a place for faculty to get

computer access when on the Parnassus campus, to meet informally, hold seminars, etc. In general, make it multipurpose, but for faculty. The need for this type of use will depend on results of the library's user studies, but we heard initial interest expressed.

The Office of Educational Technology, if it remains in the Library at all, should be co-located with core education services if possible.

**9. Develop and implement a communications plan and a management plan for education services that are to be provided within the Library..**

During times of transition, users quickly identify issues that they find troubling. By developing and putting in place a set of strategies to communicate coming changes and the rationale for those changes, the library will go far in softening the discussion that is sure to come.

A management plan for education services that would be provided in the repurposed area is also critical. Library space is different than typical administrative space. Users and visitors identify the whole library as being the library. Tenants and services provided within that space are almost always presumed to be the responsibility of the library. Printers that jam, programs that are not accessible in the education space will prompt users to come to library staff for help. It is imperative that the management of service issues and the communication of those plans to users be given high priority as transition to new models is underway.

**10. Continue strategic planning to ensure the library's central knowledge management role is recognized in institutional planning. As part of this effort, develop the framework for enhancing customized library services at other campus sites.**