![RULA - Ryerson University Library & Archives]

Ryerson University Libraries and Archives Environmental Scan Report November 2014

Drafted by the Strategic Planning Working Group:
>Sara Allain
>Sonny Banerjee
>Gillian Byrne, Chair
>Cecile Farnum
>Alison Skyrme
>Weina Wang

Prepared by

Socio-Cultural Committee:	**Technological Committee:**
Ursula Trescases	Elizabeth MacLaurin
Diane Granfield	Sally Wilson
Ophelia Cheung	Weina Wang
Kevin Manuel	Curtis Sassur
Sonya Panangaden	Val Lem
Alison Skyrme	Marina Morgan
Economic-Political Committee:	**Peer Libraries Committee:**
Kelly Dermody	Naomi Eichenlaub
Jane Schmidt	Trina Grover
Sonny Banerjee	Lies Weijs
Ann Ludbrook	Josephine Choi
Mandi Arlain	Flora Hon

Table of Contents

Introduction

In summer 2014, Ryerson University Library and Archives (RULA), embarked on an environmental scan to inform its strategic planning process. The Strategic Planning Working Group (SPWG) adapted the collaborative approach taken by the University of British Columbia Okanagan Campus Library, in which committees made up of librarians and library technicians explored various environmental factors, based loosely on the STEP (PEST) framework. The factors examined at RULA were:

> Social-Cultural Factors
> Technological Factors
> Economic-Political Factors
> Peer Libraries Factors

Examining peer groups is not a traditional component of the STEP framework, but the SPWG felt it was an important element to cover, so the political and economic factors were merged to create the peer libraries factor. This factor was an exploration of RULA's standing against several key Ontario library peers.

Process

Each of the four factors was assigned to a committee for investigation. The Committees looked at the areas with the following lenses:

- External environment (outside of Ryerson, with a focus on the Ontario/Canadian context)
- Internal environment (Ryerson University)
- Internal environment (RULA)

Each Committee was asked to determine approximately five factors and for each, documenting the evidence to support the factor and theorizing on its potential impact on RULA over the next 3-5 years. Finally, each committee submitted a report to the SPWG, which was posted to the Library Intranet for internal library access. The final environmental scan document was developed from these reports.

Findings

External Factors

Changing Demographics

Ontario's population is growing. Based on projections to 2038, the population will continue to grow. The majority of that growth is projected to come from immigration. (Statistics Canada, 2014)

Toronto is the primary destination for international students, accounting for 27% of all international students in Canada in 2012. Entry of international students to Toronto increased 40% between 2009-2013. (Citizenship and Immigration Canada, 2014) Ryerson's enrolment reflects this diversity, with over 700 international students enrolled in 2013. (University Planning Office, 2013)
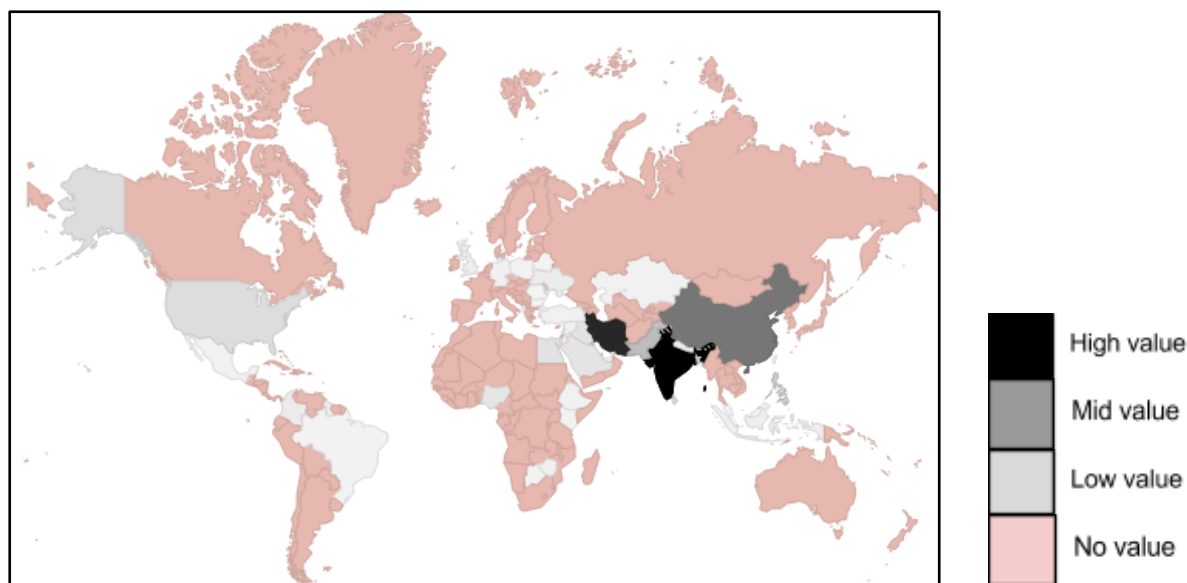

Table 1. Country of Origin for Students at Ryerson (2012)

Net migration is projected to account for the majority of population growth in the province. In Toronto, the population with a visible minority status is expected to increase from 1% to 4% between 2012-2017, and official language as mother tongue is expected to decrease about 3% between 2012-2017. (Environics Analytics, 2014)

Cultural Shifts

Millennials (those born since 1980), make up the largest percentage of students entering university. The mean age of undergraduates at Ryerson is 22 years old, meaning that many students now attending Ryerson fit this demographic. (Stanton, 2014) Various studies have shown that Millennials place a high premium on online materials. Research into the learning styles of Millennials is still in its infancy, however, and the assumption that Millennials have the innate ability to use technology is tantamount to assuming older generations have a natural understanding of card catalogues and indexes because they can read.

A movement toward "Open Everything", encompassing software, textbooks, syllabi, journals, and more, is being driven by technological, economic and social factors. Open Access - unrestricted free access to peer-reviewed scholarly research - has changed the way that researchers, publishers, and libraries think about the traditional scholarly journal. Open Source Software (OSS), meaning collaboratively developed software programs whose source code is made available to users, has become more sophisticated and now competes with the functionality offered by proprietary software models. This has led to OSS solutions becoming increasingly viable software options for the library sector.

Economic Implications

In 2013, the Ontario provincial government announced a cap on tuition hikes of 3 per cent on average over the next four years, down from 5%. (Ontario Ministry of Training, Colleges, and Universities, 2013) As Ontario universities have the lowest per-student grants in Canada, this represents a significant challenge. The current government has also indicated that there are no plans to increase overall funding, but instead will provide targeted funding for specific projects such as deferred maintenance.

There is evidence of a sharp decrease in federal funding, largely tied to research. The Tri-Agencies (SSHRC, CIHR, NSERC) will receive a total of $37 million in new funds from 2014-2015 onward; however, this is after several years of cuts to the agencies. In real dollars, since 2009, CIHR's budget has dropped by 6.4%, NSERC's by 5.7%, and SSHRC's by 6.8%. (Higher Education Strategy Associates, 2014)

The Canadian dollar will continue to be a challenge, as it is expected to hold at around, or even below, 90 cents to the US dollar through 2015. (Babad, 2014)

Political Climate

In 2013, the provincial government released Ontario's Differentiation Policy Framework for Postsecondary Education. (Government of Ontario, 2013) Funding for institutions is now based on the Strategic Mandate Agreement (SMA) that each institution strikes with the government. As part of the process, post-secondary institutions identify their strengths and then select key programs for expansion. Ryerson's priorities, as outlined by the university's SMA submission, (Office of the President, Ryerson University, 2012) are Economic Innovation, Educational Innovation and Community   Institutional Innovation. The differentiation framework

also lays the groundwork for increased collaboration between post-secondary institutions to allow for transfer of credits, as well as establishing an e-learning framework and developing quality assurance guidelines for teaching and learning outcomes.

The federal government has placed an emphasis on the results of publicly funded research being publicly accessible. The *Draft Tri-Agency Open Access Policy* proposes that all publications arising in Tri-Agency funded research either be published in open access publications (gold/hybrid OA), or that final peer-reviewed full-text manuscript be deposited in an institutional/subject repository (green OA). (Canadian Institutes of Health Research, Natural Sciences and Engineering Research Council of Canada, & Social Sciences and Humanities Research Council of Canada, 2014) The same policy recommends that CIHR funded research projects be required to retain original datasets for 5 years and deposit them in a publicly accessible location.

Legislative Landscape

The Ontario government enacted the Accessibility for Ontarians with Disabilities Act (AODA) in 2005. Under AODA, the library is required to make institutional information accessible to people with disabilities, as well as making accessible versions of library resources available upon request. Full compliance is required by January 1st, 2021, although Ryerson plans to meet, exceed and lead in this initiative. Library-led initiatives provide further guidance for achieving AODA compliance. A report commissioned in March 2013 looks holistically at what post-secondary education libraries should be considering as they move towards AODA compliance. (AODA Research Panel, Heads of Libraries and Learning Resources, Colleges Ontario, 2013) The Accessibility Information Toolkit for Librarians provides practical guidelines, a checklist, procedures, and best practices for existing models that will help us achieve compliance, while also referencing legal requirements as necessary. (Scholars Portal, 2014)

The shifting landscape around Copyright remains a major issue for Canadian libraries. The introduction in 2012 of Bill C-11, the Copyright Modernization Act, broadened the scope of the fair dealing exception to include education in addition to research, private study, criticism and review. (Government of Canada, 2012) Further Supreme Court decisions also contained broad ramifications for universities, including a decision concluding that copies made by a teacher for their students may fall within the scope of fair dealing. As a result, many post secondary institutions have opted out of the Access Copyright Agreement, instead relying on Fair Dealing Guidelines and transactional licenses. The environment is still unsettled: York University faces a legal battle with Access Copyright over transactional licensing; the Copyright Board still must rule ruling on a mandatory tariff being granted to Access Copyright; and additional Copyright Act updates may to come into effect in 2017.

Technological Evolution

Recent developments in pedagogy have emphasized experiential learning and learning by doing. For example, makerspaces are open community places where members with common interests gather to share resources and knowledge and to build things using communal

resources, such as 3D printers. In academic libraries, makerspaces are places that contain materials, tools, and technologies to allow for hands-on exploration and participatory learning.

The Internet of Things emphasizes the interconnectivity between people and objects, creating a network of billions of uniquely identified embeddable computing devices. With a sensor or built in Internet connectivity, any physical object can become a part of the IoT and transmit real-time data to the world. By 2020, there will be 26 billion devices on the Internet of Things. (Gartner, 2013)

Cloud computing is defined as the practice of using a network of remote servers hosted on the Internet to store, manage, and process data, rather than a local server or a personal computer. This can operate in a public, private, or hybrid environment. Cloud storage is seen a vital component to the growth of research data and big data.

University Factors

Population
Ryerson is displaying tremendous growth in almost all areas. The number of international students has almost tripled between 2009 and 2014. The number of graduate students continues to increase. Between 2009/10 (2,120) and 2013/14 (2,358) graduate enrolments increased by 11.2%. Enrolments for 50+programs have increased and are expected to continue to increase. (Ryerson University Planning Office, 2013)
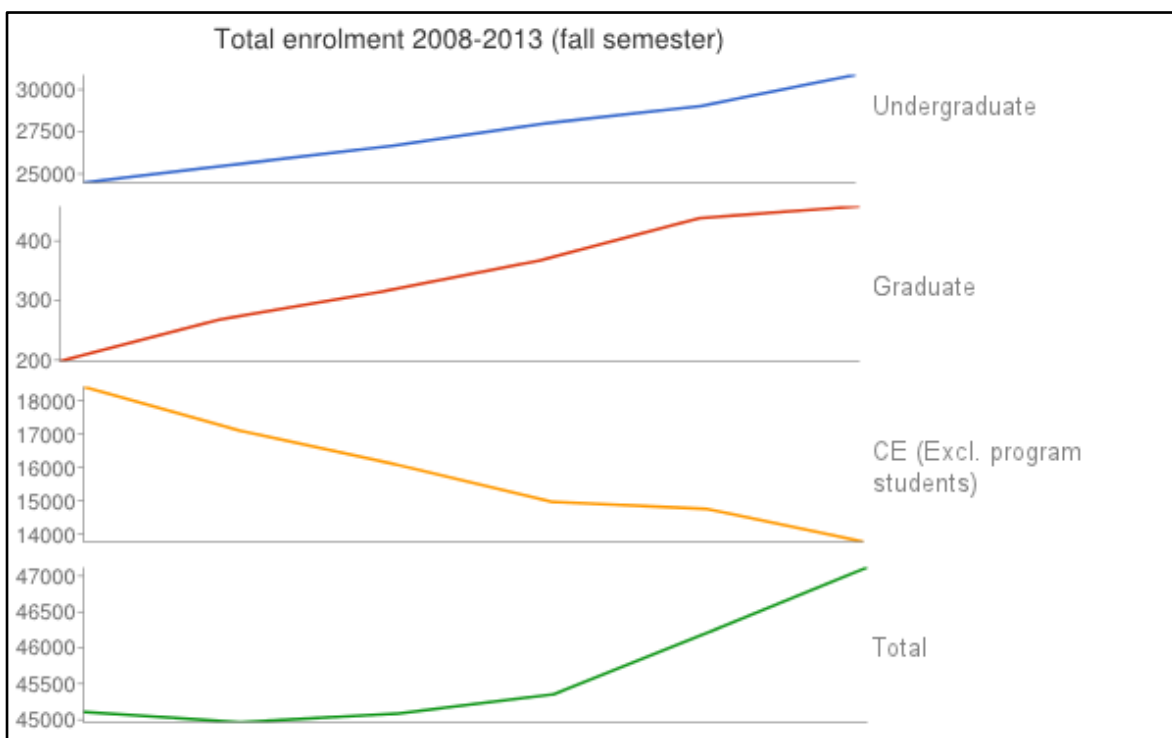

Table 2. Total enrolment 2008-2013 (fall semester)

Ryerson is a commuter campus. Although the majority of Ryerson's students come from the GTA, up to 77% of students commute to campus. (Ryerson University, 2014)

Ryerson population reflects the diversity of the GTA. Visible minorities increased from 30% in 2000 to 55% in 2012. The number of female students has increased since 2000. The ratio of male/female students in 2012 was 33.4% and 66.2% (highest concentration in part-time enrolments). The number of students having one or more children has almost doubled between 2000-2012, with the majority registered as part-time students. (Ryerson University Planning Office, 2013)

Finances

In general, Ryerson's Financial Health Indicators are positive. In the past 3 years, it has recorded a surplus in the Annual Operating Fund and it's long-term debt per FFTE Student and total liability share remain well below the system average. However, Ryerson units, including the library, have faced cuts since 2009/10.

Despite an influx of funding the past fiscal year, Ryerson Library remains very low among its peer group in key funding metrics. Ryerson ranks last among Ontario peers in library material expenditures as a percentage of university general expenditures, and low in other key metrics. Table 3 shows Ryerson's ranking compared against six Ontario libraries in our peer group.

Peer Library	Ranking: ratio of students to library personnel	Ranking: ratio of students to library expenditures	Ranking: library material expenditures as % of university general expenditures	Ranking: total library expenditures as % of University general expenditures ranking
Brock	7	7	5	6
Carleton	1	3	3	2
Guelph	2	2	1	3
Ryerson	**5**	**5**	**6**	**7**
Waterloo*	4	4	3	5
Windsor	3	1	2	1
York	6	5	4	4

Table 3. Ranking of peer libraries (Canadian Association of Research Libraries, 2012)
*Waterloo was used as a comparator in place of Wilfrid Laurier, which is not a CARL member

Salaries continue to rise. Both within the university and the library, the amount spent on salaries and benefits is growing. As salaries and benefits continue to rise, we must be cognizant of ensuring that the spread between library acquisitions and salaries does not grow exponentially (see Table 4). However, growth in salaries can also be seen as a sound investment, as increases to salaries and benefits are centrally supported once incorporated into the base budget.
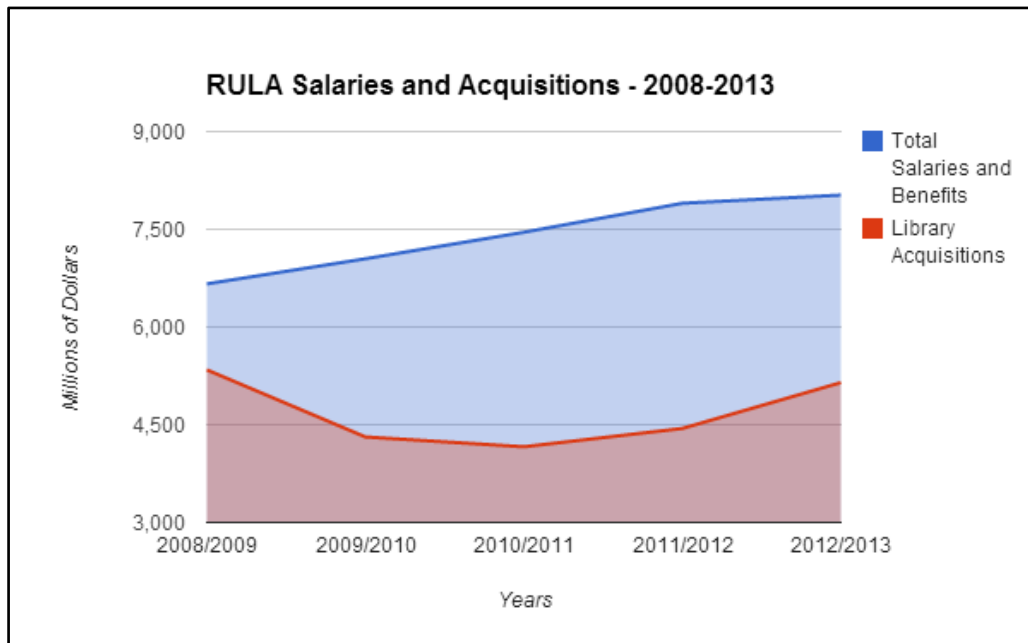
Table 4. RULA Salaries and Acquisitions, 2008-2013 (Canadian Association of Research Libraries, 2012)

University Leadership

The leadership of Ryerson is in flux. Ryerson is currently search for a new President, who in turn will lead the search for a new Vice President, Administration and Finance. Outgoing President Sheldon Levy has left an indelible mark on Ryerson in many areas, focussing on city building, transparency and innovation. It is as yet unknown what strengths and areas of focus the new leadership will bring.

Strategic Focus

Ryerson has been at the forefront of setting specific, differentiated goals for the University. These include a focus on entrepreneurial and career readiness and innovation, with obvious success stories like the Digital Media Zone and new initiatives such as zone learning.

Paired with this concentration on entrepreneurship and innovation is the desire to increase research funding by targeting specific areas for growth. The recently released Academic Plan highlights strategic areas of funding that "will strengthen collaboration across the university and with partners on cross-disciplinary themes". (Office of the Provost and Vice President Academic, Ryerson University, 2014) The Library must be prepared to support research growth in these areas.

Space demands continue to play a major role in Ryerson's growth. The new Student Learning Centre, attached to the Library and in which the Library has taken a leading role in development, will both alleviate student study space pressures, and present many more opportunities for growth for the Library. The new Church Street development, scheduled to come on stream in 2018, will add 250 resident students to the Ryerson population. (Ryerson

University, 2014 October 22) As a neutral space on campus, this explosion in the population will have major impact on the Library's space and services.

Collaboration

Ryerson has placed a high value on collaboration between academic units. This is highlighted in the academic plan, where collaboration is mentioned as a key success factor under every priority. The library is already participating in this strategic goal through university-wide collaborative initiatives such as zone learning.

The desire for collaboration extends beyond the university to government, also keen on the idea of shared services and systems wherever economies of scale could result. An example of this is the call for learning modules through the MTCU Ontario Online initiative, which expressly promotes universities collaborating to produce learning modules that are available to all of Ontario. This may require a shift away from developing learning tools and modules within the institutional LMS and towards creating open, shared learning objects.

Library Factors

The Library is in a period of transition. We need to adapt to the fact that there won't be a clean breaking point between preference for electronic vs. print, between open source and commercial software, between supporting new programs while sustaining existing ones. We must evaluate the best way to proceed in these cases, and be prepared to make hard choices about where to put our resources. Key to success in this environment is a flexible staffing cohort, succession planning, and solid policy creation.

The Library infrastructure, both in terms of facilities and technology, must be shored up. As is natural in a time of explosive growth, the Library has focussed on building the new; our previous strategic plan concentrated on Building our Success. We must continue to build, but we also need to consider how to sustain our successes. This includes ensuring our library technology is sustainable, well supported and developed, that our collection growth is strategic and ongoing, and our existing space developed to ensure the needs of students.

The Library's mandate is continually expanding into new areas. This is illustrated in the breadth of collection that we need to maintain to support university programs, as well as into emerging areas such as research data management and scholarly communications. The Library's tradition of collaborating with internal partners such as Student Learning Support and the Learning and Teaching Office and the DMP, and on a consortial level, both provincially and nationally will be key to rising to these challenges.

The Library must be prepared to demonstrate our value. The current economic climate has created an environment where everyone is expected to do more with less and where areas within the university are competing for a dwindling pot of money. In this environment, the Library must continue to advocate for its unique value proposition. This includes providing metrics and rationales for our activities, advocacy on the part of staff with peers and administration, and

tying our activities directly to the Academic Plan. While focusing on our achievements, we must ensure that we can illustrate our context among our peer universities. We consistently rank low in Maclean's Survey of Universities. (Macleans Magazine, 2014) To illustrate our ROI potential, we can concentrate on activities that will increase this ranking. Finally, we must not forget our intangible strengths, but instead make them obvious and transparent.

References

AODA Research Panel, Heads of Libraries and Learning Resources, Colleges Ontario. (2013). Accessible Library Services: Strategies for compliance with the Information and Communications Standards of the Accessibility for Ontarians with Disabilities Act.

Babad, M. (2014, March 28). Canadian dollar forecast to stick below 90¢ through end of next year. *The Globe & Mail*. Retrieved October 28, 2014, from http://www.theglobeandmail.com/report-on-business/top-business-stories/canadian-dollar-forecast-to-stick-below-90-through-end-of-next-year/article17692021/

Canadian Association of Research Libraries. (2012). CARL Annual Statistics. Retrieved October 28, 2014, from http://www.carl-abrc.ca/en/research-libraries/statistics-measures/carl-annual-statistics.html

Canadian Institutes of Health Research, Natural Sciences and Engineering Research Council of Canada, & Social Sciences and Humanities Research Council of Canada. (2014, April 28). Draft Tri-Agency Open Access Policy. Retrieved October 28, 2014, from http://www.nserc-crsng.gc.ca/NSERC-CRSNG/policies-politiques/Tri-OA-Policy-Politique-LA-Trois_eng.asp

Citizenship and Immigration Canada. (2014, June 17). Preliminary tables – Permanent and temporary residents, 2013. Retrieved October 28, 2014, from http://www.cic.gc.ca/english/resources/statistics/facts2013-preliminary/07.asp

Environics Analytics. (2014). DemoStats: Estimates and Projections. Accessed via Simply Map Canada 3.0.

Gartner. (2013, December 12). Gartner Says the Internet of Things Installed Base Will Grow to 26 Billion Units By 2020. Retrieved October 29, 2014, from http://www.gartner.com/newsroom/id/2636073

Government of Canada. (2012, June 29). Copyright Modernization Act (S.C. 2012, c. 20). Retrieved October 28, 2014 from http://laws-lois.justice.gc.ca/eng/annualstatutes/2012_20/page-1.html

Government of Ontario. (2013, November 1). Ontario's Differentiation Policy Framework for Postsecondary Education. Retrieved October 28, 2014, from http://www.tcu.gov.on.ca/pepg/publications/PolicyFramework_PostSec.pdf

Higher Education Strategy Associates. (2014, February 1). The 2014 Federal Budget: A Higher Education Strategy Associates Commentary. Retrieved October 29, 2014, from http://higheredstrategy.com/wp-content/uploads/2014/02/2014-Budget-Commentary.pdf

Macleans Magazine. (2014, January 1). University Rankings. Retrieved October 30, 2014, from http://www.macleans.ca/education/unirankings/

Office of the President, Ryerson University. (2012, October 2). Strategic Mandate Agreement submission. Retrieved October 28, 2014, from http://www.ryerson.ca/about/president/sma_submission.html

Office of the Provost and Vice President Academic, Ryerson University. (2014, June 1). Our Time to Lead: Academic Plan 2014 – 2019. Retrieved October 30, 2014, from http://www.ryerson.ca/senate/agenda/2014/Academic_Plan_Draft_Full_June_3_14.pdf

Ontario Ministry of Training, Colleges, and Universities. (2013, April 1). Tuition Fee Framework Guidelines for Publicly-Assisted Universities 2013-14 to 2016-17. Retrieved October 28, 2014, from http://www.planningandbudget.utoronto.ca/Assets/Academic+Operations+Digital+Assets/Planning+$!26+Budget/2013-14+Guidelines+for+Tuition+Fee+Framework+Implementation.pdf

Ryerson University Planning Office. (2013, January 1). Retrieved October 27, 2014, from http://www.ryerson.ca/upo/statistics

Ryerson University. (2014). Student Learning Centre Student Survey. Unpublished Survey.

Ryerson University. (2014, October 22). Church Street Development set to transform downtown. Retrieved October 30, 2014, from http://www.ryerson.ca/news/news/General_Public/20141022-church-street-development-set-to-transform-downtown/

Scholars Portal. (2014, May 1). Accessibility Initiatives: Toolkit. Retrieved October 28, 2014, from http://guides.scholarsportal.info/ACE/toolkit

Stanton, P. (October 2014) *Environmental Scan: External Factors to Consider in Academic Planning*. Presentation to Academic Planning Group. Presentation conducted from Ryerson University, Toronto, ON.

Statistics Canada. (2005, March 22). Study: Canada's visible minority population in 2017. Retrieved October 29, 2014, from http://www.statcan.gc.ca/daily-quotidien/050322/dq050322b-eng.htm

Statistics Canada. (2014, September 17). Population projections: Canada, the provinces and territories, 2013 to 2063. Retrieved October 28, 2014, from http://www.statcan.gc.ca/daily-quotidien/140917/dq140917a-eng.htm.