**COLD POSITION DESCRIPTION TASK FORCE**

**WORKING DRAFT DOCUMENT**

**FINAL DRAFT – 10/12/2021**

**KEY POINTS & RATIONALE FOR FILLING EDDIE CHOY’S POSITION**

***Our goal is to outline key arguments and points to help build the case to fill the position.***

* The recent retirement of Eddie Choy from the position of Director of Systemwide Digital Library Content (hereafter Director/SDLC) presents an opportunity for the Chancellor’s Office to consider long-term future needs in a key strategic area – library services and information resources – for the largest public university system in the nation. The CSU System invests significantly in its libraries through both systemwide support and campus-level support. One of the key strategic roles of the Academic Technology Services Division within the Chancellor’s Office is to develop and maintain a robust and rich set of scholarly information resources and platforms that support the core curriculum and all academic programs in an equitable manner. As a representative of the Chancellor’s Office and on behalf of the 23 CSU campus libraries, Mr. Choy has negotiated and licensed a common collection of scholarly resources that represent a significant investment and annual expenditure of approximately $22 million. These negotiations included negotiations with a wide variety of vendors for full-text digital content as well as for the shared library services platform, the Unified Library Management System (ULMS) known as ExLibris Alma.
* Following the announced retirement of Mr. Choy, the CSU Council of Library Deans (COLD) and Chancellor’s Office Academic Technology Services staff worked collaboratively to discuss and identify key needs for both the system and individual campuses in regard to this vacancy. With Mr. Choy’s retirement, COLD feels there is a unique and critical opportunity to re-evaluate the needs of the system and member libraries prior to recruitment for this position. These discussions focused on outlining the key responsibilities of the position and the position requirements. An updated proposed position description has been developed based on these discussions. COLD recommends that the updated position be reviewed by CO Human Resources staff to ensure that the position is at the appropriate MPP level and that a market-based salary analysis be done prior to recruitment.

Recently filled positions in this area include:

* + University of California / California Digital Library – New hire made; previous incumbent was at approximately $180,000
  + SCELC Executive Director – New hire at approximately $180,000
* COLD feels this vacancy affords the CSU the chance to refocus the responsibilities of the position in a more strategic way that will serve us well in a volatile academic publishing marketplace that will undoubtedly evolve to include more opportunities for collaborative negotiations with other entities in California including the University of California System, the California Community College System, the State Library of California, and the Statewide California Electronic Library Consortium (SCELC).
* Going forward, the academic publishing marketplace and ecosystem are likely to continue to evolve offering new opportunities to collaboratively negotiate licenses and big deals on a statewide basis. At least one vendor has inquired about negotiating one contract to serve the UC, SCELC, and CSU systems. Such opportunities may maximize access to information and enhance the return on investment for the electronic resources we commit to license. In this evolving landscape, having an incumbent who has academic library/library consortium/academic publishing experience and knowledge will be critical to ensuring that CSU is well represented in negotiations that involve other systems such as the UC System as well as the California Community Colleges and the California State Library. If the person selected for this position does not possess the academic library/library consortium/academic publishing experience, CSU may be at a disadvantage compared to other library systems in the negotiation process. Both the UC System and SCELC recently hired new Directors who help to negotiate for electronic resources and both have professional experience and education from the academic library or library consortium world and strong knowledge of academic publishing.
* It is clear that it is in the best interests of the CSU to invest in an individual who has a strong understanding of the academic publishing marketplace and library experience so they can approach the process for negotiations in an informed manner that ensures the development of robust systems and licenses resources that best serve programs throughout the CSU in a manner that is, equitable, strategic and ensures the widest access.
* The candidate selected for this position will be in the position of negotiating multi-million dollar contracts for library resources and platforms that support student learning and success as well as faculty productivity and research. With the appropriate education and professional background, the individual selected will have the potential to negotiate significant savings and enhance the buying power for the CSU. Based on the importance of this position to the 23 member libraries, COLD recommends that the Chancellor’s Office recruit candidates from the academic library or library vendor marketplace with strong expertise and excellent track records in negotiating “big deal” library collections. Recruiting someone with an understanding of academic publishing and in depth knowledge of the electronic resources marketplace would enable the CSU libraries to achieve consortial savings and to approach this in a strategic manner rather than in a contract-by-contract approach favored by the “purchasing officer only” model.
* Since 1999, the Chancellor’s Office has negotiated and licensed a common collection of scholarly resources that represent a significant investment and annual expenditure of approximately $22 million for the CSU System and the individual campuses. These digital collections of full-text journals, databases, and eBooks have been critical to providing a standard set of basic resources to our 23 campuses and help to support student learning and success by ensuring equitable access across the system. During the extended closure of all campuses, these online resources were vital and critical to supporting virtual teaching and learning. Without online access to these information resources, teaching and learning would have been severely impacted in negative ways and would have placed a larger burden on teaching faculty to modify course assignments and projects for a resource-poor situation and might have rendered it impossible for students to complete assignments and projects for credit courses. It is clear that it is in the best interests of the CSU to invest in the development of robust systems and license resources that best serve programs throughout the CSU in a manner that is, equitable, strategic and ensures the widest access.
* On an annual basis, the Director/SDLC will be expected to negotiate approximately 70 contracts/licenses for electronic products for the Electronic Core Collection which supports all 23 libraries in the CSU System and (insert #) of contracts/licenses for the Opt-In Collection which supports the individual libraries for a total annual spend of $22 million, representing approximately 70 core and [need number] opt-in online collections. These online library resources, colloquially known as “big deal” collections, are costly, tend to increase in cost every renewal cycle, and are also highly sensitive to negotiation pressure for both their cost and their terms and conditions. Another [need percentage] of this role is spent negotiating licenses for other high-cost system-wide expenditures such as our common catalog, the Unified Library Management System, currently [need $ amount] per year.
* The need to expand the requirements and expectations for the individual who represents the CO and the CSU is clear from the size of the investment. The candidate selected should be able to represent the CSU from an informed position of strength at the negotiating table. COLD would like to see the candidate selected move forward with the implementation of consortial management software and develop robust data gathering and analysis in order to have a strong understanding of the usage of the various resources. Using CSU System and member libraries data to inform development of our negotiating strategies is far preferable to relying on data provided by the vendor with whom we are in negotiation as this puts CSU at a disadvantage.

**PROPOSED REVISIONS TO KEY PARTS OF**

**POSITION DESCRIPTION FOR EDDIE CHOY**

*We will NOT rewrite every aspect of the Position Description. We will focus on the key parts – which are below -- and Leslie will insert the final text into the PD format that the CO’s office uses when we are done.*

**CURRENT CLASSIFICATION** = Administrator II

New position description should be reviewed to ensure the position is at the correct level

*We agreed to draft the position description and then Leslie can work with CO/HR to determine appropriate classification. Based on our discussion, this position might have previously been an Administrator III when Lisa Mosley was the incumbent.*

**FLSA STATUS** = Exempt – Same

**CURRENT WORKING TITLE** = Director of Systemwide Digital Library Content

Suggested Alternative Titles?

* Director of Shared Resources & Digital Content [This matches the committee name.]
* Director of Systemwide Library Negotiations [This seems to be a title that goes back to the “purchasing officer” only approach – I recommend that we stick with current title as “Content” is more appropriate.]

*Titles from other Consortia Vacancies:*

* Shared Collections Program Director, California Digital Library
* Tampa Bay Library Consortium Executive Director
* Executive Director, Statewide California Electronic Library Consortium (SCELC)
* Program Director for Collection Development & Management, UC San Diego

1. **PURPOSE OF THE POSITION**

*Since the position description form stipulates “State the basic purpose of the position in one or two specific statements,” we will write this last after we finalize other updates to the overall position description.*

**Current Wording**

Under the direction of the Assistant Vice Chancellor of Academic Technology Services (AVC/ATS), the Director of Systemwide Digital Library Content is responsible for comprehensive leadership and management of the contracting of systemwide electronic library content, library technology applications, library services, and other related outsourcing projects in support of CSU Libraries systemwide.

**Proposed Wording**

Under the direction of the Assistant Vice Chancellor of Academic Technology Services (AVC/ATS), the Director of Systemwide Digital Library Content is responsible for comprehensive strategic leadership and management of the contracting of systemwide electronic library content, library technology applications, library services, and other related outsourcing projects in support of CSU Libraries systemwide.

1. **MAJOR RESPONSIBILITIES**

|  |  |
| --- | --- |
| Provides strategic leadership for systemwide negotiation, licensing, and management of shared resources and digital content for the CSU Libraries. | **60% ?** |
| Manage CSU Systemwide library contract for library applications as the Unified Library Management System (ULMS), intercampus content delivery, and technologies and services that support library services that support library services throughout the CSU. | **30% ?** |
| Manages ongoing innovation in systemwide digital library acquisition by developing new licensing strategies to incorporate open access and seeking out transformative agreements and collaborative approaches to fund author processing charges. | **10% ?** |

**IV. LIST OF TASKS OR DUTIES**

**Current List of Tasks & Duties**

* Responsible for periodically renegotiating existing systemwide E-resources contracts and negotiating new E-resources contracts totaling approximately $22 million. Specific duties include:
  + Working with campus librarians and other staff to develop user requirements
  + Developing bidding documents
  + Evaluation of proposals
  + Contract negotiations
  + Ongoing vendor relationship management
* Manage E-resources agreements with the University of California library consortium (CDL) and Statewide California Electronic Library Consortium (SCELC).
* Serve as liaision between E-resources vendors and CSU Council of Library Deans (COLD) an Electronic Access to Information Resources Committee (EAR).
* Oversight of legal and contract management issues involving E-resources agreements.
* Oversight of E-resources website and CSU E-Resources Contract Store.
* Assist campus librarians with the development, review, and interpretation of E-resource agreement rights and restrictions.
* Coordinate with campus libraries on the delivery and issues of implementation of contracted services and issues.
* Manage business relations with contractors for other systemwide library products and services, including content preservation, content facilities management strategies, and book delivery services.
* Manage business relations with contractor for the Unified Library Management system (ULMS) – ExLibris Alma – and all the related technologies and services integrated into this library technology platform.
* Coordinate the integration of the contracted E-resources with the CSU’s systemwide digital library discovery services.
* Manage new E-resources projects (eBooks, etc.) including:
  + Working with campus librarians and other staff to develop user requirements
  + Development of cost/benefit analyses
  + Developing bidding documents
  + Evaluation of proposals
  + Contract negotiations
  + Ongoing vendor relationship management
* Incorporate data analytics to prepare data for publisher negotiations and CSU library prioritization
* Manage the incubation and innovations in systemwide digital library acquisition through distribution.
* Other duties as assigned.

**Proposed List of Tasks & Duties**

* Works with the CSU Council of Library Deans (COLD), the Shared Resources & Digital Content (SRDC) Committee, and Chancellor’s Office staff to envision, articulate, and implement the collaboratively-developed strategic direction and initiatives for building and managing the CSU systemwide collection of electronic resources (E-resources), a collection that supports student learning and success in an equitable manner in addition to supporting the core curriculum and the teaching, learning, and research mission of the CSU system, the nation’s largest public university system.
* Advises and keeps the CSU Council of Library Deans (COLD) and the Shared Resources & Digital Content (SRDC) Committee apprised on topics related to licensing and management of E-resources as a systemwide consortium. Develops and maintains a current understanding of the academic publishing ecosystem and market trends, vendor developments, market mergers and acquisitions, product and platform development, etc.
* Serves as permanent member of the Shared Resources & Digital Content (SRDC) Committee and works with committee members to support cooperative and collaborative collection development, develop sustainable shared strategies that ensure the CSU Libraries provide access to rich and robust collections, and foster transparent and open licensing models that ensure CSU authors retain maximum right and distribution in transformative agreements wherever possible.
* Coordinates development of overall budget proposals for the CSU Systemwide Digital Library Content program and develops specific requests for funding including requests for specific products for the ECC, projecting future needs, and preparing requests and compiling data for CSU System legislative proposals for additional funding.
* Responsible for strategic and day-to-day management of the selection, deselection, and licensing of electronic information resources and platforms for the largest public university system in the nation including the Electronic Core Collection (ECC) and Opt-In Collection contracts. Negotiates new and existing systemwide E-resource contracts for databases, E-journals, and E-books, currently [need total number] contracts totaling approximately $22 million annually. Works with COLD and campus librarians and staff to identify products for consideration and procurement including setting up trials, identifying user requirements, developing bidding documents, evaluating proposals, handling contract negotiations, and managing vendor relationships.
* Serves as the chief procurement officer representing the CSU in negotiations with E-Resources vendors on behalf of CSU, COLD, and the Shared Resources & Digital Content (SRDC) Committee. Responsible for oversight of legal and contract management issues involving E-resources agreements. Responsible for oversight of E-resources website and CSU E-Resources Contract Store.
* Advises and provides guidance and training and professional development for CSU campus librarians on licensing and negotiation topics. Assists individual campus librarians in developing negotiating strategies as needed. Assists campus librarians with the development, review, and interpretation of E-resource agreement rights and restrictions.
* Coordinates assessment activities for shared resources and digital content working with campus partners and vendors to collect, maintain, report, and analyze data and statistics generated by systems. Develops strategies, methods, and processes to efficiently and effectively monitor and evaluate usage and value of digital content including specific products and platforms to CSU faculty, students, and researchers. Compiles data on usage and conducts analysis of usage to inform negotiations with vendors. Manages deselection of products and platforms as needed. Prepares presentations and reports on collections usage and value for CSU audiences.
* Coordinates system-level Accessible Technology Initiatives (ATI) ensuring that all electronic resources licensed for the CSU Libraries are reviewed for accessibility prior to procurement. Develops and maintains current knowledge of accessibility requirements for electronic resources.
* Works collaboratively to support CSU Affordable Learning Solutions (AL$) Program assisting in eTextbook licensing and other shared resource strategies. [need more details here?]
* Fosters strategic partnerships with organizations outside the CSU – including University of California’s California Digital Library (UC/CDL), Statewide California Electronic Library Consortium (SCELC), California Community Colleges, State Library of California, etc. [are there others?] – that facilitate opportunities to offer and expand access to information resources. Represents CSU in joint negotiations between these external consortia and vendors including development of bidding documents and evaluating proposals. Manages E-resource agreements that are partnerships with these external consortia.
* Works with COLD and Scholarly Communications Committee to seek out publishing models and negotiate agreements that prioritize open access and to educate CSU authors on their rights as authors and on open access publishing options. Strategizes on the negotiation and implementation of transformative publishing agreements to secure Open Access (OA) publication for CSU authors and to control costs for the CSU Libraries.
* Works with COLD to support systemwide initiatives – such as the Ethnic Studies requirement – by identifying electronic resources that may be added to either the Electronic Core Collection or Opt-In Collection of resources.
* Coordinates the integration of licensed E-resources with the CSU’s systemwide digital library discovery services.
* Manages the business relations and contract renewal negotiations with the vendor for the Unified Library Management System (ULMS) – ExLibris Alma – and all the related technologies and services integrated into this platform. [Clarify this role with David’s role?]
* Develops and maintains good rapport and business relationships with information industry providers in order to obtain the best and most economical services and resources for CSU Libraries.
* Manages business relations with contractors for other systemwide library products and services, including content preservation, content facilities management strategies, and book delivery services.
* Coordinates with campus libraries on the delivery and issues of implementation of contracted services such as the courier service.
* Manages ongoing innovation in systemwide digital library acquisition by developing new licensing strategies to incorporate open access and seeking out transformative agreements and collaborative approaches to fund author processing charges. [This may need more clarification – what is this duty?]
* Supervises 3 FTE employees and responsible for recruitment, onboarding, coaching, and evaluation of direct reports. [insert more detail here on scope of supervisory duties?]
* Pursues professional development activities and attends professional meetings and conferences to develop and maintain knowledge, skills, and abilities. Represents CSU at appropriate professional meetings and conferences.
* Coordinates special projects and performs other duties as assigned.

**V. SUPERVISION OF OTHERS**

|  |  |  |
| --- | --- | --- |
| **Name** | **Classification Title** | **Type of Supervision** |
| Teri Joiner | Administrator I | Direct |
| Grace Torres | Administrator I | Direct |
| Ying Lui | Administrator I | General (via T. Joiner) |

**VI. POSITION REQUIREMENTS**

1. **LIST EDUCATION AND YEARS OF EXPERIENCE REQUIRED. IF APPLICABLE, INCLUDE NECESSARY CERTIFICATES AND LICENSES.**

**Current Wording**

* Bachelor’s degree in Business, Accounting, or related field; Master’s degree preferred.
* Seven years of progressive experience in contract management and reporting, business management, and/or project management.
* CPM or CPPO

**Proposed Wording**

* ALA-accredited MLS/MLIS degree OR equivalent advanced degree such as an MBA OR equivalent work experience in one or more fields of library services, contract management, or project management.
* Five to seven years of progressive experience in collection development and management in an academic or research library or similar setting (working for a consortium, vendor, etc.) including direct experience negotiating licenses for electronic resources including databases, eJournals, and eBooks.
* Certification in project management (CPO) and/or in public procurement (CPPO) preferred.

1. **LIST ADDITIONAL SKILLS, KNOWLEDGE, AND ABILITIES REQUIRED FOR THIS POSITION, AND TELL WHY EACH IS REQUIRED. RELATE THIS TO THE REQUIREMENT OF THE MAJOR RESPONSIBILITIES. DIFFERENTIATE BETWEEN SKILLS THAT ARE REQUIRED AND SKILLS THAT ARE PREFERRED.**

**Current Wording**

* A significant understanding of the decision-making process and structure of a large, complex, educational institution like the CSU.
* Ability to communicate strategic and tactical plans effectively, in written and oral form.
* Ability to direct complex tasks and projects while managing E-resources contracts and formulating proposals for implementation and improvement of policies and procedures.
* Ability to identify and resolve issues, escalating them as needed to management as appropriate.
* Ability to define, organize, and manage multiple projects concurrently.
* Ability to research numbers and facts and present them clearly and concisely.
* Ability to effectively supervise subordinate staff.

**Proposed Wording**

* Experience working successfully within the structure and culture of a large, complex educational institution like the California State University System OR with a regional or statewide academic or research library consortium.
* Experience in academic library collection management activities across a range of subject areas, including experience with emerging modes of content acquisition, licensing, discovery, and delivery.
* Direct experience in negotiating terms, pricing, and contracts for electronic resources and services for an academic library or library consortium. Experience in managing a multi-millon dollar collections budget and in developing budget requests and proposals.
* Working knowledge of trends, issues, models, and strategies related to existing and emerging academic library collection management, scholarly communication and publishing, and open access. Familiarity with the full range of open access initiatives and strategies employed by the higher education community including awareness of the range and structure of transformative publishing agreements and open educational resources.
* Demonstrated working knowledge of business practices and workflows surrounding library and/or consortia content acquisition. Ability to coordinate maintenance of licensed resources and troubleshoot as needed.
* Understanding of integration and interoperability of library services platforms and systems, repositories, websites, and research platforms.
* Experience in and ability to develop data-driven collections assessment activities including developing appropriate strategies and methods to collect, evaluate, and analyze electronic resources collection usage data. Ability to extract collections data housed in various CSU and CSU Libraries management systems and from vendors. Experience presenting collections assessment data to diverse audiences of stakeholders.
* Confident, clear, and compelling communication skills, with exceptional writing, oral and presentation abilities. Experience in communicating strategic and tactical plans effectively in written reports and communications, in virtual meetings, and in formal presentations.
* Experience in project management and ability to manage projects, set and adjust priorities, make informed decisions, meet deadlines, and follow tasks through to completion while working under pressure and ensuring quality and accuracy. Demonstrated ability to identify, define, outline, organize, and manage multiple projects concurrently so that timelines and deadlines are met and projects remain within budget.
* Experience in program development and management, including strategic planning and implementation, partnership development, problem solving, and budget management.. High level of initiative and ability to recognize and anticipate what needs to be done to identify and resolve issues, escalating them as needed to management as appropriate.
* Exceptional problem solving, critical thinking, and analytical skills.
* Ability to develop creative solutions for successful outcomes while working with key stakeholders within an institutional framework and collaborative environment.
* Demonstrated sound professional judgement and ability to exercise discretion and tact in working with multiple stakeholders.
* Ability to effectively advocate for the CSU Libraries in contract negotiations and other venues.
* Demonstrated cultural competence and ability to provide leadership in ways that center equitable and inclusive collection practices.
* Ability to establish and maintain effective working relationships with a broadly diverse community of colleagues including administrators, faculty, and staff in a manner that fosters collaboration to facilitate strategic planning and decision-making.
* Experience as supervisor and manager and demonstrated leadership and administrative skillset to lead, manage, and coach a diverse staff and facilitate ongoing development of professionals and ensure outstanding service. Ability to develop long-term and short-term goals for the team.

1. **LIST MACHINES, TOOLS, EQUIPMENT, AND MOTOR VEHICLES USED IN THE PERFORMANCE OF DUTIES.**

**Current Wording**

* Knowledge of Excel, Microsoft Word, Adobe Acrobat, and PeopleSoft Financial/HR Systems.

**Proposed Wording**

* Working knowledge of Microsoft Office Suite (Word, Excel, PowerPoint, Outlook) and Adobe Acrobat.
* Experience working with PeopleSoft Financial and HR systems.