

University of Guelph Library Integrated Plan in Year 5

Strategic Update for 2010/11



Overview:

This “year 5” update to the integrated plan is intended to identify progress to date on the Library’s key objectives for 2009/2010 and set some key strategic initiatives for 2010/2011.

Despite the very difficult economic climate experienced by the University (and society in general) over the past year, the Library has been able to achieve or continue a number of the key strategic initiatives which clearly align with our core responsibilities within the University, and which were highlighted in our Integrated Plan for 2009/10. These have included:

- completion of planning and initial implementation of an organizational renewal process (organizational re-structuring) which will better position the Library to respond to the University’s current teaching and research activities. This included:
 - engagement of staff in a range of planning and discussion activities, to define the Library’s vision and roles and develop an organizational structure to best support that vision
 - delivery of a number of staff training workshops to prepare them for the ways of working that will be required in the new organizational model
 - human resources management for the transitioning of staff to the new organizational model
 - successful recruitments for several manager positions which will support the Library’s organizational renewal initiative - Head of Archival & Special Collections, Head of Research Enterprise & Scholarly Communications, Web Development Librarian
- increasing the capacity and impact of the IR budget:
 - additional funding received from the University was used to sustain existing collections and support new program initiatives
 - the implementation of a new Reserves Management system and a library media server has improved faculty and student access to e-learning content, especially in DE courses.
 - working with TSS to improve the ability of instructors to manually incorporate course reserves into their D2L pages
 - moving beyond the traditional online library catalogue to implement a new information discovery tool (Primo) which uses web 2.0 functionality to improve the ability of users to find and interact with information
 - Participated in local and Ontario Council of University Libraries government publications collections projects (print management and digitization of unique or core print resources)
- sustaining and growing collaborative programming for learning and curriculum support:
 - providing leadership for the OCUL geospatial portal project
 - increased number of workshops and (increasingly) course or curriculum-embedded support for a range of academic literacies (learning, writing, information literacy, geospatial data)
 - through the Graduate Student Learning Initiative, offered new collaborative workshops for graduate students which combine learning, writing and research skills

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- continuing to foster an active academic town square through hosting of events and other initiatives (e.g. Campus Author; Living Library event; student-juried art show; Improvisation, Community and Social Practice exhibition, etc.)
- Improving Library services to the research community:
 - In response to requests from external private and public sector research partners, piloting development of a cost-recovery service for library services such as document delivery, selected dissemination of information services, and enhancing information literacy for research staff.
 - In conjunction with Graduate Studies introduced an e-thesis programme to enable digital submission of theses facilitating the submission process and increasing exposure of students' work
 - Increased the number of Open Journal Systems-hosted academic journals and collections in the institutional repository, the Atrium
 - continued development of OurOntario digital collections (making the Library's Archival & Special Collections available over the web)
- focusing development activities (University Campaign) on the Library's goals for expanding and renewing the archival & special collections facilities
- based on continuous review of building and collections usage patterns, and the need to adjust for the loss of staff positions through the VERR program, introducing facilities, staffing and work process efficiencies:
 - adjusting opening hours and material re-shelving to align with usage patterns; reducing staff intervention in the booking of group study spaces and grad carrels
 - removing collections from the OVC Library and moving to virtual rather than onsite services whenever possible. Transitioning management of the facilities and its furnishings and equipment to OVC is underway, so that it can be repurposed as study and learning space for the College.
 - reviewing and making adjustments to the Library's public IT infrastructure services e.g. distributed printing, public laptop loans and service demands, public desktop usage

The next fiscal cycle will present the Library with some very difficult financial and organizational challenges. In 2010/11, along with the rest of the University, we will be in the third year of a multi-year plan to reduce the Library's budget as part of the University's efforts to eliminate its structural deficit. May 2010 also marks the point in time when most of the Library staff that have opted into the University's 2008 Voluntary Resignation/Retirement program will be leaving, and the resulting adjustments to services and staffing priorities will need to be implemented. The Library's strategic focus over the next year will therefore be one of conservation, as we seek to maximize and carefully allocate our available resources in ways that will have the highest level of impact for our top priorities and core services.

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Strategic Directions for 2010/2011

Strategic Priority 1: Enrich the user's experience – enhance the learner's success, partner with faculty, and support research

Key Area: Create a vibrant “academic town square” and user experience

- Implementing the recommendations of an accessibility review of the Library's "soft services", which will complement the physical facilities review already completed and enable full participation in the “academic town square” for people with disabilities and assist the Library in meeting AODA obligations.
- Complete and review recommendations of User Services Review to determine resource implications and implementation strategy.
- New user experience team is charged with identifying and prioritizing areas for improving the users' experience online and in the Library and with developing and applying user experience design principles to online and in-person user service and space development
- Create a design, operational plan, and proposal for a Research Commons and Digital Discovery Centre. This is collaboration between COA, CME, CSHAS, CCS, the Office of Research and the Library. The RCDDC is envisioned as place where faculty and graduate students can collaborate on innovative research projects, explore and create digital resources and tools, manage data, and consult experts. As a commons it creates a community and knowledge network of digital scholars fostering multi- and inter-disciplinary research.
- Explore, through the Learning Commons partnership, the development of an online point of connection and suite of resources for students in search of study groups partners to improve and expand student access to peer tutoring opportunities. Responds to needs of students looking to connect with others in their classes to engage with course content and improve learning skills..
- Enhance research consultation services and programmes such as: research, data, author rights, copyright, publishing and open access consultations, and, data and information management services.
- Seek cross-University investment to increase Writing Services staffing levels, to respond to growth in embedded curricular programs and the need for ESL graduate student support

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Strategic Priority 2: Create and sustain an agile information space: IT infrastructure

Key Area: Provide computing facilities that meet the needs of library users and staff

- Replace the current networked distributed printing service system to allow for seamless wireless and wired printing and eliminating the need for a separate payment card thus reducing Library staff mediation in payment and card systems.
- Review service agreement and Library's contribution to CCS managed lab services.
- Identify best solutions for immediate server migration needs; explore collaboration with CCS's Managed Server virtualization service.
- Investigate and find solutions for storage needs in collaboration with CCS.

Key Area: Provide maximum availability and performance of online services

- Implementation of Ares portal to Access Copyright's Rights Management System. Together with our TUG partners, Guelph will be providing criteria to Atlas systems for the design of an electronic gateway from Ares to Access Copyright's Rights Management System and will also assist with the testing and development. The portal will expedite the clearance of eLearning and Reserve copyright permissions, saving time and staff resources as well as facilitating more timely availability of Course Reserve readings to users.
- Selection and implementation of a content management system to help empower Library employees and service areas to manage web content and make changes and modifications to websites quickly and easily.
- Develop a Library intranet in response to the Internal Communications Team recommendation for a centralized location for internal communications and organizational information (intranet and repository). These activities will be guided by a project charter and executed by a cross-functional project team.

Key Area: Develop and evolve the Library's online services to provide seamless access to information resources and services

- Further develop the integration of Ares Course Reserve services with Desire2Learn (CourseLink) in collaboration with TSS. Plans are underway to incorporate new features such as student Hot Lists and the automatic loading of Ares content into relevant D2L course pages. This initiative will further enhance student learning and meet faculty demands for more streamlined access to Course Reserve content within D2L.

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- Pilot electronic delivery of TUGdoc and ILL articles – this would improve service to patrons by providing immediate desktop delivery of requests and would reduce the pickup load at the Circulation desk.
- Develop a core infrastructure for local digital collections initiatives that meets national and international standards for data harvesting, metadata, access, and preservation. Take project to pilot stage and eventually into production.
- Develop a Virtual Research Environment platform to provide research teams with enhanced tools for digital asset management, collaboration, data curation and preservation, and knowledge dissemination

Strategic Priority 3: Building information collections – the digital imperative, the transformation of scholarly communication and responsible stewardship

Key Area: Build and enhance information collections

The Library's plans in regards to Information Resources for 2010/11 reflect the need to address long-term financial pressures, primarily from serials inflation on electronic resources. The focus this year is not on acquisition of significant new resources but on the costs of sustaining current resource commitments; acquisitions of significant new content will need to be leveraged from within the existing information resources budget. In addition, the forecast assumes a straight line, base currency exchange rate, and so the effects of exchange rate fluctuation have been removed from cost calculations and planning priorities.

In addition, the move by the provincial government to harmonize the provincial sales tax with the GST to form the HST will result in additional tax payable on electronic resources. Currently library e-resources are considered taxable under a ruling by CRA. The Library pays a net of 33% of tax payable on the GST (67% is rebateable). The impact of this tax harmonization in self-assessed tax on current E-resources expenditures will be a \$67,000 increase.

- Secure additional funding for our information resources in order to ensure that the Library can continue to provide access to world-class scholarly information. The Library is extremely challenged to respond to the following complex pressures on the information resources budget:
 - ⇒ rising cost of inflation on information resources averaging 6% annual base budget increases needed, approximately \$234,000 for 2010/11,
 - ⇒ need to secure funding for the Canadian Research Knowledge Network resources (the initial funding has been provided through CFI, but this subsidization will end in 2010 and the University is contractually committed to continue funding these resources after the CFI funding ends) - \$167K OTO for 2010/11

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- ⇒ restrictive publishing and licensing regimes (limiting the use of electronic information and requiring the payment of premiums for copyright clearance and permissions particularly for usage within D2L or other online course systems)
 - ⇒ multi-year licensing and funding commitments for electronic resources “packages”, which reduce the Library’s ability to selectively cut specific titles or resources
 - ⇒ urgent need to increase funding for new and fast-growing services such as e-learning support and open access publishing which require copyright clearance payments and author publishing and open access financial support – annual base budget increases of \$10K and \$40K respectively
 - ⇒ the demands of new academic programs and new research initiatives, which often require significant start-up funding for purchase of core information resources in order to meet assessment and accreditation criteria – annual base budget increase of \$25K requested but this does not allow for any significant investments
 - ⇒ need to secure additional funding to support the acquisition of e-books– annual base budget increase of \$25K requested
- Continue to invest in consortial purchasing and digital management of electronic resources in order to maximize the Library’s buying power and increase efficiency of information delivery and access in support of research, teaching and learning e.g. the Ontario Scholars Portal and the Canadian Research Knowledge Network (CRKN).
 - Work to re-align information resources spending with the University’s curriculum revision process as it proceeds, to eliminate spending on programs/courses which are no longer being taught
 - Maximize OTO spending on information products of high value to the University (e.g. backfiles of core journal titles), rather than committing to multi-year licensing which may not be sustainable in future years
 - Invest in strategic pre-payment for some of our multi-year electronic licenses, in order to receive discounts, ensure the long-term availability of key scholarly information products, and take best advantage of small year-end surpluses in the Information Resources budget (due to slippage in year-end vendor billing cycles)
 - Re-negotiating vendor contracts in order to achieve maximum flexibility regarding cost or payment strategies – this will help us to respond more effectively to our local needs and financial practices, and to ensure best value for money spent
 - Research and plan a re-assessment of the inclusion of file-level descriptions for Archival and Special Collections materials in Trellis
 - Continuing to support building collaborative collections with the University of Guelph-Humber Library Services through the UofGH collaborative collection development plan

Key Area: Supporting scholarly communication through open access to digital collections

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- Establish the new research and scholarly communications programme in collaboration with campus partners:
 - ⇒ Develop a Virtual Research Environment providing research teams with enhanced tools for digital asset management, collaboration, data curation and preservation, and knowledge dissemination
 - ⇒ Introduce data consultation services to steward data throughout the life of the research cycle and beyond
 - ⇒ Launch the e-thesis programme so that all students are aware of the option to submit their theses digitally, facilitating their submission, increasing exposure of their work, and contributing to the greening of the campus
 - ⇒ Growing the institutional repository to accommodate additional open access mandates and celebrate the intellectual output of the university
 - ⇒ Reach out to print-only journals to offer them our OJS platform for open access, peer-reviewed scholarly journals
 - ⇒ Promote the concept of open access by encouraging adoption of open access mandates and contributing to author-pays open access publishing
 - ⇒ Acting as a campus resource for information on author rights, copyright and alternative publishing options
 - ⇒ Leverage our relationship with vendors and publishers to advocate for publisher agreements that allow authors to retain as many rights as possible over their intellectual product
- Develop a formal digitization strategy, policy and infrastructure to increase visibility and access to unique holdings. We will continue to digitize a number of special collections (e.g. Theatre, LMM, Scottish, landscape architecture and culinary collections) and to participate in global, national, regional, and institutional digital conversion initiatives, including the Open Content Alliance and Our Ontario.

Key Area: Ensure permanent access to and physical storage of information resources

- Capital Campaign targeted to secure the funding required for a significant renovation and extension of Archival and Special Collections to accommodate the growth of these collections (the current collections facility is projected to reach maximum capacity by 2012), ensure their long-term preservation, and increase access and visibility.

Strategic Priority 4: Building collaborative relationships to achieve goals

Key Area: Collaborating in the learning and research environments

- Collaborate with COA, CME, CSHAS, CCS, the Office of Research in the design and planning proposal for a Research Commons and Digital Discovery Centre to establish critical central infrastructure and support for digital humanities and social sciences research and create a community of interdisciplinary scholars, faculty and graduate students.

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- Collaborate with Graduate Studies on the launch of an awareness campaign for the e-thesis programme so that all students are aware of the option to submit their theses digitally, facilitating their submission, increasing exposure of their work, and contributing to the greening of the campus.
- Reinforce the partnership between the University of Guelph and the University of Guelph-Humber Learning Commons, exploring joint ventures to bring comprehensive learning services to students
- Work with other campus support and academic units to enhance and improve coordination of academic support for ESL learners
- Work with the Graduate Student Learning Initiative on their exploration into the provision of more integrated research services for graduate students, in particular in the area of research management support.
- Collaborate with other campus partners such as students, and Student Life and Residence Staff in the development of an online point of connection and suite of resources for students in search of study groups to improve and expand student access to peer tutoring opportunities.
- Collaborate with the Office of Research and other campus partners in the establishment of new research and scholarly communications programmes, services, and networks.
- A&SC will continue to collaborate in and support major national research projects by participating on archival committees and contributing materials e.g. Living Archives on Eugenics in Western Canada, Improvisation, Community and Social Practice, Canadian Writing and Research Collaboratory.
- Continue collaboration in the national CFI project *Synergies: Canada's SSH Research Infrastructure* - A platform for the publication and the dissemination of research results in social sciences and humanities published in Canada.
- Providing leadership for two OCUL projects which are enhancing infrastructure and user support for data (<ODESI> and geospatial information (the new Geospatial portal)
- Collaborate in curriculum review and development processes with OVC to enhance learning objectives through the 40% secondment of the Science Learning Specialist to OVC over the next 2-3 years
- Host the joint Association of Canadian Map Libraries and Archives/Canadian Association of Public Data Users conference in spring 2010

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Strategic Enabler A: Develop our people

Aligning our skills and human resources with our strategic priorities:

- Support training and development initiatives to enable teams and staff to meet their mandates, provide new services and fill new roles as a result of the Organizational Renewal Initiative.
- Explore collaborative training opportunities with Guelph Humber Library Services
- Seek (through Library-specific funding or collaborative partnerships) to address identified staffing needs for service growth or enhancement to support:
 - library users with disabilities
 - use of learning technologies
 - information technology development work
 - e-learning
 - writing services

Strategic Enabler B: Fostering a culture of assessment

Measuring the success of our strategic priorities:

- Further development and implementation of the Data Mart Program* to facilitate improved access, processing and storage of data collected by the Library to assist reporting, operations and management practices. *Data marts are centralized repositories for processed data.

*To measure how well we are **Enriching the User Experience**:*

- Analyze the results of the Winter 2010 LibQual+ assessment of library service, to determine if there are areas that require further investigation, and develop plans to improve our service.
- Evaluate student learning outcomes and information literacy skill levels by re-instituting the use of the Association of Research Libraries SAILS (Standardized Assessment of Information Literacy Skills) instrument.
- Systematizing assessment of user experience. Create a user experience baseline, identifying available data and gaps, and exploring new methodologies for observing and measuring behaviours as distinct from needs
- Continue to develop effective ways of assessing the academic support services provided by the L&CS team by measuring learning outcomes and development of specific skills.
- Develop new and improved procedures and tools for capturing service activities for Library teams to enable tracking and reporting requirements and management decisions.

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To measure how well we are **Creating and sustaining an agile information space and IT infrastructure**:

- Assess and evaluate in-library computing needs. In 2012 the current desktop complement will be at the end of its lifecycle, we will need to have clear evidence to support reinvestment in desktops, and to retrofit dedicated public desktop computing space to accommodate use of wireless laptops, and alternate means of providing computing capacity.
- Develop an assessment strategy and identify most appropriate tools for the analysis of web usage and navigation and the user experience (e.g. tools like Google analytics or Morale).
- Review current methodology for managing system support tickets to inform operations, predict infrastructure and human resource demands.

To measure how we **Build Information Collections and Support Scholarly Communications**:

- As the Library moves to develop a common infrastructure for digital collections, develop a digital collections use database in order to gain insight from users into the present and future demands or growth of resources.
- Analyze the results of the Winter 2010 OCUL Scholars Portal MINES assessment, Measuring the Impact of Networked Electronic Services , to determine the purpose of use of electronic resources and implications for e-resource access and collection development.

Strategic Enabler C: Transforming our spaces

- Conduct a comprehensive space review by contracting experienced library architects or space designers to develop concept plans for long-term renewal and re-purposing of the Library's physical facilities. As the University's needs continue to evolve, it is crucial that the Library adapt its facility to accommodate new kinds of academic and scholarly needs. This review will incorporate and inform the following key strategic space requirements and goals:
 - ⇒ Undertake conceptual planning and seek donor support as part of the University's fundraising campaign for expansion of the Library's rapidly growing archival and special collections.
 - ⇒ Create new learning spaces by minimizing the Library's print collection footprint (e.g. invest in compact shelving, offsite storage, digitization of collections, and e-content, etc.).
 - ⇒ Participate in the planning for the proposed Research Commons and Digital Discovery Centre by contributing to design and identifying second floor space and collections accommodation needs and requirements.
 - ⇒ Conduct a review of group learning space usage, to respond to continuing expansion of the Library's academic support programs (Learning, Writing, SLGs, Information Literacy). This review will assess facility resource availability and suitability in the Library and across campus
 - ⇒ Implement recommendations from Organizational Renewal Initiative Winter planning for Library staff relocations to enable, within available resources, co-location of new work teams.