
Leddy Library
Operations Strategic Plan

2005 – 2009

Introduction

This document details a strategic plan for the Leddy Library, University of Windsor, for the next five years (2005 to 2009). This is Leddy's second strategic plan, the first being passed by ULAC in June, 1995. This second strategic plan builds on the goals and objectives of the first plan and the subsequent Five-Year Plan adopted by the Library in 1999.

The 1995 Strategic Plan and the 1999 Five-Year Plan centred on major focal issues that would drive library service and resource development. The focal issues from the 1995 Strategic Plan were: delivery of services, collections and access to information, physical facilities and equipment, staff resources, organizational climate, achieving a greater presence on campus, and financial resources. The Five-Year Plan had two major foci. The first articulated Leddy's mandate of support for research activity on campus and the second focused on Leddy partnering with other groups on campus to foster study, learning and research skills for undergraduate students. Under those two foci, specific objectives included: partnerships in teaching and research, information literacy programmes, the acquisitions budget, consortial activity, information technology, research/scholarly/professional activities, marketing, library facilities, and resource allocation.

This 2005 to 2009 plan builds on these foci and develops new strategies to keep the Library abreast of the resources, technologies and services that are required to support teaching, learning and research at the University of Windsor. The goals, objectives and action strategies in this plan will together support the vision of a learner-centred institution that produces skilled and informed graduates and supports excellence in research and teaching, as outlined in *To Greater Heights*.

Ten years have passed since Leddy's first strategic plan and we are now more than seven years past the development of the Five-Year Plan. Those years have seen phenomenal changes in academic libraries and academic librarianship, and this is reflected in some shifts in focus between past plans and this plan for the next five years. Information technologies were just coming in from the perimeters in 1995. Today they are a given, a necessity in planning future goals and objectives for any library. Information technology underscores every library activity and as such can no longer be easily demarcated as a separate focal issue. Digital resources and consortial activity, in their infancy in 1995, are now core to our Library and run as threads throughout several goals and objectives rather than as separate foci. Information literacy, identified as a new focus in the Five-Year Plan, has been solidly integrated into Library services, intertwined with reference and collection development activities. Other foci such as facilities and space planning, organizational structure, budget, and acquisitions are clearly identified again in this plan as major issues needing development and improvement.

The following plan for the next five years should be read as a continuation of the previous plans, identifying areas of strength that need continued support, areas that need improvement, and new services, resources and structures that need development.

Process & Time-line

The Strategic Planning Steering Committee was created in April 2004. Membership included Gwendolyn Ebbett (University Librarian), Cathy Maskell (Associate University Librarian), Joan Dalton (Head, Access Services), Art Rhyno (Systems Librarian), and Peter Zimmerman (Arts & Humanities Librarian). The Steering Committee collected extensive background information from a variety of sources and distributed this material to all Library staff. This included the Library's previous strategic plan and annual updates, the report of the Reference Department's Internal Operations Committee, and the reports of recent surveys (including LibQUAL) and focus groups undertaken in the Library; University of Windsor documents, including the President's *To Greater Heights* document; as well as external documents such as other Canadian university libraries' strategic plans, recent research on strategic planning, and *The 2003 OCLC Environmental Scan: Pattern Recognition*.

One of the first tasks the Steering Committee undertook was an examination of the Library's Mission Statement, adopted in 1993 as part of the first Strategic Plan. It was felt that the existing Mission Statement remains valid and relevant and did not need revision. The Steering Committee elaborated on the Library's Mission by developing a Statement of Values. Both the Mission Statement and Statement of Values are reproduced in the next section of this document.

The Steering Committee held an all-staff meeting on April 21, 2004 as a Library-wide launch of the strategic planning process. Alane Wilson, editor of *The 2003 OCLC Environmental Scan*, was invited to present to the staff some of the larger issues facing libraries in the 21st century. Staff were also informed of the process and timelines that the Steering Committee had developed, and they were strongly encouraged to participate.

In May, 2004, the Steering Committee held seven focus groups within the Library targeting a variety of staff configurations. The data gathered from the focus groups was combined with user feedback, primarily from the LibQUAL survey.

The LibQUAL survey provided further compelling evidence with respect to the Library's operations and services. The survey achieved an exceedingly high participation rate from the

campus community. Faculty, staff and students took the opportunity both to stress the high value of the Library, and to emphasize areas of concern.

The survey and other feedback mechanisms pointed to four broad areas of particular importance that have a synergy for staff and the Library's patron community, and it is these that have formed the structure of this plan. The areas are:

- Governance and Staff
- Collections and Resources
- Services
- Space and Facilities

On August 31, a representative group of librarians and staff attended a strategic planning retreat moderated by Melody Burton from Queen's University Library. Participants were asked to identify and prioritize issues and to generate ideas to carry into the next phase of the planning process. The morning sessions consisted of the whole group brainstorming around what needed to be done in each of the four focal areas. In addition, the group talked about the ongoing impact of technological change. The afternoon of the retreat was spent in breakout sessions that looked in more detail at each of the identified focal areas.

After the retreat, the Steering Committee put out a call for volunteers to take part in subcommittees each charged with developing recommended goals and objectives for one of the focal areas. The work of these subcommittees makes up the bulk of this plan. The subcommittee members were:

Governance and Staff: Cathy Maskell (chair), Christina Pringi, Mita Sen-Roy, Graham Staffen, Leila Wallenius.

Collections and Resources: Peter Zimmerman (chair), Alexander Affleck, Pat Belanger, Bill Jackson, Jennifer Soutter.

Services: Art Rhyno (chair), Katharine Ball, Anne Kaay, Alan Laporte, Kirsti Stipanivic.

Space and Facilities: Joan Dalton (chair), Bob Elliott, Lucy Formicuccia, Pat Moore, Marg Smole.

The subcommittees began meeting in October and completed their final reports early in December. The Steering Committee then consolidated the subcommittee reports and distributed the first draft of the Strategic Plan to the Library community in February, 2005.

Organization of This Plan

The plan is put together in the same format as the 1995 Plan. The sections are arranged around the four focal points described above: Governance and Staff, Facilities, Resources, and Collections. Each section begins with a short text describing the rationale behind the recommendations and providing some context for the reader as they consider the goals, objectives and action strategies as laid out.

The rationale statement is followed by a listing of the goals, objectives and action strategies for that focal issue. As with the main sections, each goal is followed by a brief rationale to provide a clearer definition of that goal. Goals should be considered a general guiding statement, targeting the accomplishment of a particular aspect of the larger focal issue. Objectives are more specific actions or strategies that together will realize the larger goal. Action strategies are tasks or actions that will realize each objective.

Note #1: The goals, objectives and action strategies are phrased in terms of the current structure of the Leddy Library. It is understood that the realization of some objectives or action strategies may impact other processes initiated by this plan, and that some aspects of the plan may need to be changed or refined in light of the activities created by this document.

Note #2: The term “staff” refers to all library staff, librarians and support staff together. References requiring the identification of a subset of staff (i.e. “librarian”, “support staff”) will refer to that specific subset.

Table of Contents

Leddy Library Mission Statement	8
Core Values	8
Focal Issue 1: Governance	9
Goal 1: Goals & Priorities Setting	9
Goal 2: Workload for Librarians	11
Goal 3: Accountability	12
Goal 4: Role of ULAC	13
Goal 5: Orientation & Training.....	15
Goal 6: Communication	15
Goal 7: Service Culture	17
Focal Issue 2: Collections and Resources	19
Goal 8: Acquisitions Budget	19
Goal 9: Institutional Repositories.....	20
Goal 10: Acq/Bib & Collections: Interactions	22
Goal 11: Collections Policies	23
Goal 12: Collections Maintenance.....	24
Goal 13: Data for Collections Work	25
Goal 14: Approval Plans	26
Goal 15: Training & Best Practices.....	27
Focal Issue 3: Services	29
Goal 16: The OPAC.....	29
Goal 17: Web Services.....	30
Goal 18: Computing Environment	31
Goal 19: Communication & Interaction with Patrons & Departments	33
Goal 20: Public Tracking Measures	33
Goal 21: Photocopying & Printing.....	34
Goal 22: Service for Print Collections & Interlibrary Loans Service	35
Goal 23: Library Hours.....	36
Goal 24: Peer-to-Peer Service for Students	37
Focal Issue 4: Space and Facilities	38
Goal 25: Space Planning	39
Goal 26: Security.....	40
Goal 27: Signs.....	41
Goal 28: Library Cleanliness.....	42
Goal 29: Study Space.....	43

Leddy Library Mission Statement

The Leddy Library is an integral participant in the delivery of academic programmes and the pursuit of research at the University of Windsor. For its primary user group of students, faculty, and staff it: (i) provides timely and ready access to the world's knowledge and information, (ii) develops and preserves collections with emphasis on the University's chosen areas of focus, and (iii) provides a learning environment which enables the pursuit and creation of knowledge.

Core Values

In support of the Library's mission, and within the context of the mission of the University of Windsor, the Leddy Library articulates the following core values to serve as a foundation for our services for and interactions with students, faculty, staff, and the local community.

- We value a learner-centred environment that is responsive to changing information needs and expectations.
- We value open and equitable access to information and information resources that support and promote intellectual freedom and inquiry. Further, we respect the privacy and dignity of our staff and the individuals we serve.
- We recognize and celebrate the diversity of the University of Windsor community, and we value and encourage tolerance and respect for all.
- We value a physical environment that is welcoming and respectful of the needs of all individuals and populations we serve.
- We value collaboration and communication on the University of Windsor campus, and with national and international academic and library communities.
- We value collegiality, staff participation and development, and a commitment to service excellence.
- We value the provision of a caring and supportive culture that recognizes the importance of personal growth and lifelong learning for all students, faculty, and University and Library staff.

All members of the Library's administration, librarian complement, and staff will demonstrate a commitment to these values in all their day-to-day activities.

Focal Issue 1: Governance and Staff

The Governance and Staff Subcommittee used a variety of information to guide its debates. This included the Focus Group report, the Retreat report and other submissions from staff. After many meetings and many, many hours of deliberation it became clear that the definition of and solutions to perceived or real governance issues would be extremely complex and difficult. To give perspective to the following goals and objectives, the major over-arching challenges identified (in no particular order) were:

- A perceived erosion of trust among staff, between administration and staff, and among staff and administration.
- Poor communication linkages between groups and between individuals.
- Deterioration in the process of shared decision-making.
- Lack of clarity in the responsibilities of groups and of individuals and a concomitant lack of a mechanism to determine accountability.

These issues are not felt to be mutually exclusive. The goals and objectives that follow as a whole begin to set up processes and structures to address these issues and hopefully, over the life of this strategic plan, realize significant improvements.

Goal 1: To establish goals and priorities for each department in the Ledy Library that will serve to clarify each department's mandate and together meet the mandate of this Plan.

Feedback suggested that many of the governance and staff issues were a result of a lack of focus within departments and for individuals – a poor or diffuse understanding of the primary goals of each department and how individual workloads contribute to those goals. There have been significant changes in resources and services and it has been a long time since each department has engaged in in-depth discussion about how those changes affect service delivery, staffing and workflow. The interaction between the Collections Department and the Reference Department was seen as in particular need of review as the activities in each department overlap significantly yet structurally are maintained separately, with the additional factor of SR&P attached to Collections.

Objective 1.1: The Access Services, Systems, Administration, and Acq/Bib Departments shall undertake a review of their mandates to develop a "Planning Document" that recommends service, resource, staff, training and workflow priorities as well as departmental structural problems/changes. The "Planning Document" should also clearly define the role of support staff, the role of librarians, interactions with other departments, appropriate structural changes, etc.

Action Strategy 1.1.1: By May 1, 2005, each of the named departments will establish a working group to write the draft of the “Planning Document” to present to their respective departments on or before September 1, 2005.

Action Strategy 1.1.2: Each department will review the draft document to develop a final “Planning Document” to present to ULAC on or before the November, 2005 ULAC meeting.

Action Strategy 1.1.3: Thereafter, the priorities of the department, as established in the “Planning Document” will be reviewed within the department on a regular basis and at ULAC as part of the annual reporting process in June.

Objective 1.2: The Reference Services Department and Collections Services Department will undertake a review of their mandates together as one group because of the high degree of overlap in responsibilities between the two departments. The resultant “Planning Document” will recommend service, resource, staff, training and workflow priorities as well as departmental structural problems/changes. The “Planning Document” should also clearly define the role of support staff, the role of librarians, interactions with other departments, appropriate structural changes, etc.

Action Strategy 1.2.1: By May 1, 2005, the combined group will strike a working group, in which both departments will be represented, to prepare a draft “Planning Document” to be presented to the combined group as a whole on or before September 1, 2005.

Action Strategy 1.2.2: The combined group as a whole will review the draft and develop a final “Planning Document” to present to ULAC on or before the November, 2006, ULAC meeting.

Action Strategy 1.2.3: For this combined group the report will specifically recommend a structure that best supports the priorities established (e.g. merge/split/restructure).

Action Strategy 1.2.4: Thereafter, the priorities of the department (or departments as it may be), as established in the “Planning Document”, will be reviewed within the department(s) on a regular basis and at ULAC as part of the annual reporting process in June.

Objective 1.3: ULAC will consider the priority documents from the departments to address any overlap or conflict in priorities and any proposed structural changes. A single document will be developed listing priorities and objectives.

Action Strategy 1.3.1: At the March, 2006, meeting ULAC will strike a Committee which will be charged with the task of merging the departmental reports. A draft of the merged document will be presented at the May, 2006, ULAC meeting for consideration and acceptance.

Objective 1.4: The department heads shall establish a clear mandate for the department heads meetings. DH meetings shall be held at least monthly, and decisions made at DH meetings shall be reported at the next ULAC meeting.

Action Strategy 1.4.1: The DH group shall develop a terms of reference document and present it to ULAC at the September, 2005, meeting.

Action Strategy 1.4.2: The AUL shall be responsible for ensuring that DH decisions are presented to ULAC in a timely manner (i.e. at the next ULAC meeting)

Measures of Success for Goal 1:

- Each department will have a document that clearly defines its mandate and operational structure within the specified timelines.
- Current structures will be justified, changes in structures may be recommended such that a new organizational structure will be defined.
- ULAC will recommend a plan for current and future staff needs from the combined departmental documents. This will be used to define staffing needs in the planning documents to be submitted to University Administration.

Goal 2: Workload letters for librarians will more accurately reflect the priorities of the departments to which they are assigned as well as a librarian's unique workload requirements for the upcoming year.

The current format of workload letters for librarians seems to accomplish only a broad description of librarians' workload. In keeping with language in the Collective Agreement, workload letters for librarians should adequately describe the responsibilities of each librarian with respect to their role as librarian in the Leddy Library (similar to how faculty workload letters only refer to faculty teaching and counseling duties). Workload letters might also reflect special projects, assignments, committee, professional or research activity if it significantly impacts their librarian responsibilities in a given year. The impact of the primary and secondary departmental designations for librarians should also be evaluated. This is a scheme that was defined in the 1995 Strategic Plan with the intent that it would be re-examined later. Certain workflows may have such strong commonality that the notions of primary and secondary are a somewhat artificial construct. Conversely, some librarians may be deeply involved in many areas that touch on

several departments, and the primary/secondary split may mask a more evasive set of duties. As well, the workload assignment process may be a useful opportunity to discuss and document each librarian's goals and objectives for the coming year. Looking at how goal setting might be integrated into the workload process so goals might also be reviewed on an annual basis may be an additional way for librarians to maintain clarity and purpose from year to year.

Objective 2.1: The UL and AUL in conjunction with ULAC will make recommendations for revisions to the librarian workload letters to reflect responsibilities and commitments accurately.

Action Strategy 2.1.1: ULAC shall strike a working group to be chaired by the UL to determine the efficacy of continuing to use the primary and secondary responsibility designation in librarians' workload letters and how librarians' workload letters might be restructured in other ways to reflect accurately an individual's work. This group shall also examine the efficacy of using workload deliberations to set and review goals for librarians.

Objective 2.2: Annually, the UL, AUL and Departments will work together to develop an accurate understanding of departmental priorities, environmental issues, individual workload needs, etc.

Action Strategy 2.2.1: In January the UL and AUL shall call a meeting of each Department (including those assigned to the department as a primary, secondary, tertiary, etc.) to discuss workload issues in advance of writing librarian workload letters.

Action Strategy 2.2.2: At the February ULAC the UL and/or AUL shall summarize workload issues as expressed at the departmental meetings. ULAC shall make further recommendations to the UL/AUL regarding workload as necessary.

Action Strategy 2.2.3: At the March ULAC meeting the UL will report on the outcome of workload deliberations and assignments.

Action Strategy 2.2.4: The UL/AUL will meet with each librarian in the summer months to review progress on workload objectives as well as other related goals. The UL/AUL will make a report to ULAC on these mid-year meetings at the September ULAC meeting.

Measures of Success for Goal 2:

- By February, 2006, recommended changes to librarians' workload letters will be in place.

Goal 3: The UL & AUL will develop accountability measures in consultation with ULAC and the Department Heads.

There was a strong view that all of the changes put in place to define services and workloads, establish better communications, and re-define organizational structures and responsibilities will be meaningless without accountability measures in place to address when work is not completed or when individuals are not contributing. Too often the Library establishes new processes or policies as work-arounds of people who are not contributing or are actively blocking accepted procedures. Although in a collegial environment it is incumbent upon all of us to challenge each other to meet our responsibilities, it was ultimately felt that effective accountability measures should be the purview of Library Administration.

Objective 3.1: Accountability shall be directly related to workload assignment that flows from Library and departmental priorities.

Action Strategy 3.1.1: The UL and AUL shall discuss accountability measures with ULAC with the aim of developing clear standards for accountability that are directly related to workload and Library priorities.

Action Strategy 3.1.2: Annually in August the AUL/UL shall meet with each librarian to review workload goals and objectives and record progress to date as part of the annual review process.

Action Strategy 3.1.3: Accountability shall be part of the regular workload discussions with each librarian as it complements the annual review process.

Action Strategy 3.1.4: The role of Leddy department heads shall be reviewed and discussed in light of current Collective Agreements and with specific reference to their authority as it relates to accountability of librarians and support staff.

Measures of Success for Goal 3:

- There will be a clear and transparent process to address accountability issues in the Library.

Goal 4: To reinvigorate and refocus ULAC to its role as the primary forum for considering and recommending policy and planning for the Leddy Library.

There needs to be a centralized mechanism to plan and discuss Library-wide issues and to communicate to each other with respect to services, resources, special projects. ULAC should be this central mechanism, albeit a ULAC that is significantly re-structured to realize a more focused mandate that will coordinate planning and communication. ULAC must also function as a bidirectional forum if it is to function at all effectively. Active engagement, manifest in such

activities as attending and being prepared for meetings, must accompany a re-invigoration of ULAC or the exercise will be meaningless.

Objective 4.1: ULAC agendas will be structured to enable appropriate time for planning and decision making.

Action Strategy 4.1.1: Annually, in September, Library Administration will present to ULAC a timetable of ULAC activities for the coming year and also review ULAC procedures.

Action Strategy 4.1.2: The University Librarian will provide an annual environmental review to ULAC to preface annual priority-setting exercises by the departments.

Action Strategy 4.1.3: Annually, each department will present to ULAC its priorities for the coming year (see Goal #3).

Action Strategy 4.1.4: ULAC shall be fully informed of and participate in annual internal and external budget analysis.

Action Strategy 4.1.5: Annually, the UL shall communicate to ULAC the timelines for submission of the Library budget to the University in order to allow a timely and full discussion of budget issues.

Action Strategy 4.1.6: ULAC shall fully discuss the Library budget submissions and make recommendations to the UL as to the priorities of these submissions.

Objective 4.2: To allow for greater support staff input ULAC will consider if and how it can be more representative of departmental support staff populations, keeping in mind that ULAC is constituted as the Library Council in the Faculty Collective Agreement.

Action Strategy 4.2.1: ULAC shall strike a working group to examine the issue of support staff representation (the number of support staff representatives and how they are elected) on ULAC.

Objective 4.3: All ULAC materials will be made available in a timely manner to allow preparation for upcoming ULAC meetings and to encourage participation.

Action Strategy 4.3.1: All ULAC materials (agendas, minutes, accompanying material) shall be placed in an area accessible to all staff.

Action Strategy 4.3.2: A written rationale/justification and sufficient background material shall accompany all ULAC decision/discussion items so that ULAC members are fully prepared for upcoming ULAC discussions.

Measures of Success for Goal 4:

- By September, 2005, the timetable for the September, 2005, to August, 2006, ULAC meetings will be set with the action strategy recommendations listed above clearly accounted for.
- ULAC attendance will be consistently strong, and discussion will show evidence of preparation prior to meetings.

Goal 5: To establish an ongoing orientation and training program to ensure all staff are knowledgeable of relevant issues in their departments, library-wide, campus-wide, and externally (profession-wide, social issues, etc.).

There has been consistent feedback that training issues within the library need to be more fully addressed. As the library develops its resources and services there is a recognition that orientation and training of new staff and ongoing training of staff is crucial to planning, delivering and maintaining a library responsive to patron needs. Recognizing there may be specific budgetary constraints that hamper the realization of specific training needs, the library should review its orientation and training requirements and how it can meet those requirements on an ongoing basis.

Objective 5.1: The Associate University Librarian will gather relevant information to determine orientation and training needs for library staff (see Objective 1.1, 1.2 and Goal 15). A report reviewing orientation and training needs will be presented to ULAC by the end of the first year of this strategic plan. By the end of the 5 years encompassing this strategic plan the AUL will report on the implementation of the entire programme with an aim to identifying successes, analyzing failures, and planning for future orientation and training needs.

Measures of Success for Goal 5:

- By the end of the first year orientation and training programme needs for library staff will be defined including any budgetary requirements and including a timeframe for implementing the programme
- By the end of the 5 years of the strategic plan the orientation and training programme will have as fully implemented as possible.

Goal 6: To establish clear and regular communication among Library Administration, the departments, and Library staff, with Library Administration taking a leadership role in creating an atmosphere of openness and transparency.

The Library needs to establish or re-establish clear lines of communication vertically and horizontally to enable effective communication among departments and among individuals. Staff web pages need to be used more effectively and be made more available. Clear and transparent operation of Library committees and working groups needs to be established. Although ad hoc groups may be useful from time to time, the reason for their existence, their mandate and how they may impact workflow should be communicated to the Library as a whole as soon as possible. As well, all Library committees should be able to declare their mandate, their membership and means of reporting outcomes so that all Library committees are known to all Library staff.

Objective 6.1: Library intranet web pages shall be developed with clear information as to each page's purpose, how staff can provide input for the pages, what type of news will be included, etc.

Action Strategy 6.1.1: ULAC shall strike a working group to determine the best format for staff intranet web pages. Support staff membership on this working group is vital. The working group shall recommend procedures for developing and maintaining the pages such that the purpose of each page and the means of providing material for each page are clear and to ensure that such input is handled in a timely manner.

Objective 6.2: All Library committees shall have clearly established mandates and membership. Committees are expected to communicate their progress and encourage participation.

Action Strategy 6.2.1: All ULAC committees shall be identified so that mandate and membership are clearly established and reported to ULAC by the July, 2005, ULAC meeting. It may be the case that some committees are defunct or need to be reconstituted and the case for these actions will also be made at this same ULAC meeting.

Action Strategy 6.2.2: The membership and mandate of all departmental committees are clearly recorded in departmental records and on staff intranet web pages.

Action Strategy 6.2.3: Each ULAC and/or departmental committee will have a secretary whose primary function will be to collect the work (reports, etc.) of the committee, produce meeting summaries and provide materials to ULAC, to Administration, or for staff web pages. This position is essential for documentation and communication purposes.

Action Strategy 6.2.4: All ULAC committees will make regular reports in writing to ULAC.

Action Strategy 6.2.5: As a first choice, Library-wide committees should always be established through ULAC. However, recognizing that there may be a need from time to time

to establish cross-departmental “ad hoc” committees or working groups, these groups shall be identified to ULAC as soon as possible.

Action Strategy 6.2.6: There will be an effort to make committee membership equitable and reflect the demographics of the Library.

Objective 6.3: Each department shall hold regular departmental meetings.

Action Strategy 6.3.1: Each department will establish and publish a schedule of departmental meetings. Individuals outside of the department are welcome to attend any departmental meeting. Departmental agendas/minutes/reports will be made available on staff intranet web page to enable all Library staff to keep abreast of departmental issues.

Objective 6.4: Departments shall make regular reports to ULAC in writing. The frequency of such reports should be established by ULAC.

Action Strategy 6.4.1: The Department Head in each department shall be responsible for consulting with his/her department on the style and content of the written reports to be submitted to ULAC.

Measures of Success for Goal 6:

- There are clear, accurate and up-to-date records of all Library committee work.
- Staff intranet web pages are developed to make policy documents, committee memberships, committee minutes, etc. easily accessible.

Goal 7: Develop a service-oriented culture based on mutual respect and courtesy among staff and Library stakeholders that builds confidence in the participatory process.

It is incumbent upon all staff to work together cooperatively and with respect for each other’s responsibilities and skills. Our ultimate goal of service to the University of Windsor community becomes the basis to build an environment based on collegiality and consensus building.

Objective 7.1: Create a positive working environment for Library staff and patrons

Action Strategy 7.1.1: Make use of a variety of avenues such as ULAC, seminars etc. to educate each other on best practices for communication with colleagues, conduct of meetings and related topics.

Action Strategy 7.1.2: In all interactions with colleagues (including e-mail, phone, one to one, group) and patrons, staff shall be encouraged to create a positive environment.

Action Strategy 7.1.3: Chairs of committees, meetings, etc. shall implement and follow procedures for maintaining an environment of mutual respect and collegiality. The Office of Human Resources and other external bodies shall be considered as resources in situations where meeting and working relationships are not producing positive results.

Measures of Success for Goal 7:

- The number of absentee days will decrease.
- Feedback from patrons in LibQUAL surveys will show a marked increase in the number of positive comments about the service provided by Library staff.

Focal Issue 2: Collections and Resources

The Collections Subcommittee began by simply brainstorming a broad list of collections-related topics, drawing material from the various support documents prepared during the strategic planning process and from our own experience. In the early going, we had difficulty distinguishing in our conversations between what needs to be done for the Library's collection and what needs to be done in the Collections Department. Obviously, there is a close relationship between the two. Nevertheless, in our early discussions, we tended to go back and forth between them.

We began our deliberations by analyzing the 1995 Strategic Plan. We identified collections-related objectives in that plan, then determined whether the objectives had been met. It appears as if few had been, and of those, many were not fully completed or showed very little follow-through.

Through our conversations, we began generating some interesting initiatives for developing the Library's collection. While many of our major recommendations speak directly or indirectly to the Department, we believe our recommendations on collections policies, budget allocations, and institutional repositories will build a vibrant future for the Library's collection. There are tremendous opportunities available to us as a mid-size academic library in an increasingly digital world, and it is the subcommittee's belief that the goals, objectives and action strategies detailed below will play a significant part in developing a framework to support the Library in realizing those opportunities.

Goal 8: The Library will evaluate its acquisitions budget allocations and as a result may redistribute funds accordingly. It will be necessary to include for consideration the large fund areas in which we purchase: monographs, including other one-time purchases such as audiovisual materials; serials; and electronic resources, including both one-time and serial purchases.

The Library's electronic resources budget has grown significantly. Print serials budgets have accordingly decreased significantly as the Library focused its serial acquisitions on digital resources funded out of the electronic resources budget. The Library monographs budget has remained effectively frozen for a number of years now, despite the fact that the average price of scholarly monographs has increased at a faster rate than inflation. Many of the existing departmental allocations in both monographs and serials are based on historic factors that may no longer pertain. New programs taught on campus and shifting priorities within existing programs have not consistently been reflected in the Library's acquisitions budget.

Factors to consider in any fund evaluation would include, but not be limited to: graduate and undergraduate enrolments; campus priorities, including the pinnacle areas; the average cost of monographs in each discipline; the use of and access to monographs vs. serials in each discipline; the impact of electronic resources on each discipline; independent reviews that evaluate Library holdings (such as OCGS); and a literature review of other reallocation projects.

Objective 8.1: By the end of the third year of this Strategic Plan, the Library will reallocate acquisitions budget fund allocations to best meet the needs of the University community for the foreseeable future.

Action Strategy 8.1.1: The Collections Department will establish a working group, whose membership will be drawn from the librarians with collections responsibilities, to evaluate acquisitions budget allocations.

Action Strategy 8.1.2: The working group will determine what data is needed and collect the needed data to support recommendations for any reallocation of acquisitions budgets. The working group will be provided with additional resources, as necessary, to establish systems and mechanisms for tracking the ability of budget allocations to meet the needs of the campus.

Action Strategy 8.1.3: The working group will make recommendations to ULAC regarding allocations as divided among monographs, serials, and electronic resources. One possible approach would be to develop a formula for determining how to allocate funds. Consolidation of funds in some areas might also be considered. Wide consultation both within the Library and on campus will be essential to the success of this action strategy.

Action Strategy 8.1.4: The working group shall also recommend a mechanism for ongoing evaluation and discussion of library allocations including regular involvement of ULAC in such discussions.

Measures of Success for Goal 8:

- The Library will be able to produce sustainable documentation to justify fund allocations to the campus community.
- Fund allocations will have evidence of ongoing assessment by shifting in concert with changes in programs, enrolments, etc.

Goal 9: The Library will provide open and reliable access to a wide range of digitally archived materials created on the University of Windsor campus.

The Library is the logical place for the deposition of on-campus published and unpublished material and has a role to play in fostering environments which facilitate efficient creation and management of scholarly content. Institutional repositories, and other “container” systems, can function as a digital archive for locally produced material in a variety of formats: text, data, audio, video, multimedia. The Library should be investigating sources for material for both institutional repositories and the Archives. Further, institutional repositories allow the exposure of their contents to a wide audience with relative ease. Some work has already been done in the Library to begin the development of institutional repositories. That work should be continued and supported as a high priority.

Objective 9.1: The Library will work quickly to develop institutional repositories to allow for the archiving and sharing of a broad cross-section of content representing intellectual and creative work undertaken by members of the University community.

Action Strategy 9.1.1: An Institutional Repositories Committee will be formed immediately, consisting of representation from the Collections, Reference, Acq/Bib, and Systems Departments.

Action Strategy 9.1.2: The first task of the Committee will be to articulate clearly the specific goals of the Library’s institutional repositories projects and their place within the larger OCUL and CARL frameworks and other campus initiatives.

Action Strategy 9.1.3: The Committee will identify potential content and sources of content, both published and unpublished, and prioritize these sources. Particular attention will be paid to the inclusion of University of Windsor journal publications.

Action Strategy 9.1.4: The Committee will make recommendations regarding the necessary resources to support the repositories and submit budget proposals where necessary to request additional resources.

Action Strategy 9.1.5: The Committee will recommend a clear timeline for implementation and growth of the repositories.

Measures of Success for Goal 9:

- A strategy will be in place for identifying and preserving campus content in digitized form. The Library will be seen as a campus resource for expertise and systems to help both manage personal digital libraries and to cull content together in a centrally accessible system.

Goal 10: Workflow and structural issues with respect to acquisitions, bibliographic and collections functions will be examined to determine clear and logical lines of responsibility, facilitate efficient ordering, receiving and processing of materials, and simplify resolution of problems which may arise.

There is a sense that the library needs to re-evaluate the functions related to acquisitions, bibliographic and collections functions to take advantage of new technologies and of the broad skills sets of staff in both areas. Some of the issues that were identified as relevant to this review include:

- Serials Records and Preservation is currently housed in the Collections Department, but some of the functions performed in the unit are identical to those performed in the Acq/Bib department.
- Orders for new acquisitions are often verified several times by both the librarians and staff resulting in a significant use of staff time and duplication of effort.
- Serials Records and Preservation staff take instructions from collections librarians regarding the preservation and replacement of materials; the members of the unit also work with staff in Access Services, who are often the first to recognize a preservation need.
- The functions of the Inter-Library Loan Office are somewhat distinct from those of the Acq/Bib Department in which it is housed.
- ILS performance, enhancements and upgrades have been tracked and/or implemented with minimal participation by Ledy staff possibly resulting in lost opportunities to improve one of our key resources.

The relationship between collections librarians and staff in Acq/Bib and SR&P should be more clearly defined and communicated so that there is a framework for how such interactions should occur and workflows are not interrupted with individual requests. Existing processes for communication among areas, for the development and implementation of existing and new technology, and for procedures such as ordering, need to be evaluated for efficiency and effectiveness and communicated clearly within the organization.

Objective 10.1: By the end of the second year of this Strategic Plan, the Library will have assessed current workflows related to acquisitions and bibliographic services and implemented changes as necessary to achieve maximum use of staff time and service provision for the campus [see also Goal 1].

Action Strategy 10.1.1: The workflow in all units related to acquisitions and bibliographic services shall be investigated. The Heads of the Acq/Bib and Collections Departments (and other Heads as required) will work with staff in those units as appropriate to document

workflow in the context of the overall department and, if warranted, make recommendations as to workflow/organizational changes to effect service improvements.

Action Strategy 10.1.2: A cost benefit analysis of the current process of placing acquisition orders will be completed. Procedures used by other academic libraries will be investigated to determine the feasibility of new models of ordering.

Action Strategy 10.1.3: The means of increasing Leddy's involvement and input in ILS meetings such as the Voyager's User Group meeting and in ILS committees such as Voyager User's Group committees will be reviewed by a working group of ULAC with recommendations to be made to ULAC by January, 2006.

Objective 10.2: The Library will investigate existing communication processes with respect to collections issues among librarians and staff in Acq/Bib and SR&P to establish clear lines of communication among these groups.

Action Strategy 10.2.1: The Library will establish a working group of collections librarians with and staff in Acq/Bib and Serials Records, Preservation. The working group will examine the question of collections librarians' relationship to staff in these areas, and to recommend the extent to which this relationship should or can be defined. The working group will also examine communication flow among the various groups represented, and make recommendations for improvement.

Measures of Success for Goal 10:

- There will be a functional relationship among the workflows of all staff in the units currently in Acq/Bib and Collections.
- Orders will be searched once and require fewer steps between submission and placement.
- The Library will be fully aware of the best practices in workflow within the academic library community, and will participate more fully in liaison with our ILS provider and our sister institutions.

Goal 11: The Library will review and develop collections policies for all areas to support the Library's mission and to reflect changes in information technology and the changing needs and expectations of students and faculty at the University.

The previous strategic planning process called for the development of a general collections policy for the Library and specific policies for each subject discipline. A disappointingly small number of discipline-specific policies were completed, and very few have been recently updated. Given all

that has happened in the library world since the general policy was approved by Senate in 1993, a review of all our collections policies must be undertaken.

Objective 11.1: The Library will review and update existing collections policies and create policies for those areas in which a policy does not currently exist.

Action Strategy 11.1.1: The Head of the Collections Department will update the general Library collection policy. A draft of the updated policy will be completed by December, 2006, to be considered by ULAC and later Senate as early as possible the following year.

Action Strategy 11.1.2: Once the general policy is adopted, a working group selected from the librarians with collections responsibilities will develop a template for discipline-specific policies. As part of the template, the working group will establish a timeline for completion and regular review of the policies.

Action Strategy 11.1.3: Subject-specialist librarians will develop discipline-specific policies for each subject area for which they collect, and they will be given clear timelines and guidelines for this task. It is expected that all will be completed and considered by ULAC by December, 2008, and that they will be made available as public documents as soon as approval is received.

Measures of Success for Goal 11:

- Every appropriate discipline will have a collections policy.
- The policies will be consistent and maintained on a regular basis.

Goal 12: A process for evaluating library collections on an ongoing and regular basis shall be established. This should include a means of ongoing inventory, ongoing assessment of collection strengths and ongoing evaluation for re-organization and weeding.

In many areas in the Ledy Library collection evaluation has been neglected. A full inventory of the collection including determining the accuracy of the Library's holdings in comparison to OPAC records has not been done. Adequate space for in-house collections also continues to be a concern. A weeding policy has recently been passed by ULAC but further work needs to be done to establish a process and timeline for weeding all library collections. In tandem with an inventory and weeding projects there also needs to be a full evaluation of Ledy's collection strengths and how those strengths may or may not need to be maintained and/or developed.

Objective 12.1: A complete inventory of Library collections will be done, beginning as soon as possible after the approval of this plan.

Action Strategy 12.1.1: The Heads of the Access Services and Acq/Bib departments will coordinate an inventory of the Library's collection.

Objective 12.2: Over the course of this Five-Year Plan, collections librarians will be responsible for assessing their collections areas.

Action Strategy 12.2.1: Each librarian will develop, as part of the collections policies for which they are responsible (Goal 10), guidelines for weeding, including a schedule for regular weeding in the included subject areas, targets for the extent of weeding expected, and subject-specific criteria.

Action Strategy 12.2.2: Once a specific collections policy is approved, the responsible librarian will undertake the weeding outlined in that policy in accordance with the existing weeding policy. Missing items and obvious cataloguing errors will be recorded appropriately in the OPAC.

Measures of Success for Goal 12:

- There will be a marked decrease in negative campus feedback on the physical collection.
- There will be fewer complaints about catalogue records.

Goal 13: Librarians with collections responsibilities will be able to examine relevant data (e.g. ILLO use reports, circulation statistics, Crystal reports, etc.) to identify strengths, weaknesses, and emerging needs in their areas of responsibility. This will facilitate effective ongoing collection assessment, timely purchasing of materials and judicious weeding practices.

A number of areas exist in the Library and on campus where better internal reporting would help librarians with collections responsibilities do their jobs. ILLO, circulation statistics, budget information, and Acq/Bib statistics can all be valuable sources of information. Examples of the kind of information requested might include regular reports from Access Services on items missing or lost, notification from Serials Records & Preservation when damaged items are removed from the shelves and reports from interlibrary loans on books requested.

Similarly, regular reports from campus units external to the Library could be useful sources of information. For example, an annual report from Faculty Recruitment with the names, disciplines, and research interests of new faculty would allow librarians with collections responsibilities to anticipate needs.

Objective 13.1: By the end of the second year of this Strategic Plan, the Library will have identified useful internal and external reports and made them readily accessible to collections librarians through a regularized reporting process.

Action Strategy 13.1.1: The Collections Department will establish a working group drawn from the librarians with collections responsibilities and to identify internal and external areas of the Library which can provide useful information for collections librarians.

Action Strategy 13.1.2: The working group will contact representatives of those areas and determine the feasibility of obtaining relevant information, statistics, etc.

Action Strategy 13.1.3: The working group will make recommendations to allow collections librarians routine access to internal and external reports through regularized reporting.

Measures of Success for Goal 13:

- Librarians involved in collections work will have a sense of the state of the collection and trends in its use at all times.
- It will be possible to access reports quickly and place the data behind the reports in the context of the campus environment.

Goal 14: The Library will evaluate the current use of approval plans to determine whether these plans are being used adequately or appropriately and to investigate revision or streamlining of approval plan processes.

The previous Strategic Plan projected an increase in the use of approval plans. The previous goal of “expanding approval plans, where appropriate” has not been met. Further discussion of approval plans, including an evaluation of whether they are being used adequately or appropriately, is needed. One of the reasons for using approval plans is the expectation of faster turnaround time in ordering items and sending them to the shelf. Processes for handling approval items will be examined for revision and/or streamlining.

Objective 14.1: By the end of the first year of this Strategic Plan, the Library will have evaluated its current approval plans and addressed future needs.

Action Strategy 14.1.1: The Collections Department will establish a working group whose membership will be drawn from the librarians with collections responsibilities to evaluate approval plans as a collections tool. The working group will examine relevant issues with

respect to approval plans such as what approval plans are currently in place, how they are being used, how effective they are, what new plans need to be developed, etc. The working group will also investigate workflow processes related to approval plans and, in conjunction with affected staff in the Acq/Bib department, make recommendations to revise and/or streamline these processes with the end goal of ensuring approval plan material gets to the shelves as quickly as possible.

Measures of Success for Goal 14:

- Approval plans at the Library will have a demonstrated cost/benefit advantage for their continued use.
- Every librarian will be aware of the advantages/disadvantages of approval plans.

Goal 15: The Library will develop training modules to orient and instruct new librarians who are assigned collections responsibilities on the Library's collection development philosophy, processes and procedures. There will also be a formal plan developed for ongoing education and best practices in collections development issues, and in regular evaluation and maintenance functions such as weeding.

It would be a useful exercise for the Library to develop a training package for new librarians who will be assigned collections responsibilities. By the end of this Strategic Plan, a number of librarians with collections responsibilities will have retired or be nearing retirement. The development of a training package would also have implications for many of our above-listed recommendations in that focusing on what new collections librarians need to know in this Library might bring to light processes and information sources that should be better articulated. The American Library Association's *Guide for Training Collection Development Librarians* (Z687.2.U6 A48 1996) would be an excellent place to start. Whatever training is put in place should be supplemented with ongoing training in new collections development issues or processes.

Objective 15.1: By the end of the this Strategic Plan, the Library will have in place a training program for new librarians who are assigned collections responsibilities based on the *ALA Guide*.

Action Strategy 15.1.1: The Collections Department will establish a working group to produce a training manual based upon the *ALA Guide* and other relevant resources. The training manual will be expected to cover at minimum local policies and procedures related to collections work and the competencies expected of a collections librarian.

Action Strategy 15.1.2: The Head of the Collections Department will oversee training of new librarians using the manual, as needed, and the manual will be made available to all collections librarians.

Measures of Success for Goal 15:

- New collections librarians will understand existing workflows and procedures.
- There will be a consistent approach to collections work in areas which do not fall into subject-specific differences.

Focal Issue 3: Services

The Services Subcommittee used a broad mandate to define goals, objectives, and strategies for services at the Leddy Library. The subcommittee did not make a distinction between services offered by humans or computers, and sought to add an evaluation layer to both existing and emerging services, as well as to construct metrics for success. The underlying theme of the approach might be summarized as public tracking; the subcommittee viewed the Library as an organization that needed to be aware and respond in a timely fashion to feedback from our stakeholders.

A great number of ideas came forward through the focus groups, or were initiated by feedback from LibQUAL and other campus forums, and the subcommittee tried to incorporate these suggestions as much as possible into action strategies. Through meetings, discussion, and exchanging documents, the subcommittee identified a core set of objectives and a sizeable task list for adding and augmenting services.

Goal 16: The OPAC will accurately reflect library collections within established rules and guidelines for bibliographic control and within the broader array of access points to library collections and services.

There was significant feedback indicating a growing dissatisfaction with the current state of the library's OPAC including inaccurate or incomplete records and typographical errors. Since the 1995 strategic plan, the library has fully embraced the use of digital resources and online services. Many library services are now provided outside of the traditional access point of the OPAC. The library needs to examine how the OPAC, as a main access point, works with other access points such as the library web pages, to ensure we are providing optimal access for our patrons.

Objective 16.1: The Library will define more clearly how the OPAC does and will function as one part of an array of access points to library collections and services.

Action Strategy 16.1.1: The Head of Acquisitions/Bibliographic Services shall establish a working group to examine the use and maintenance of the OPAC. The working group shall examine the use of the OPAC as an access point in relation to other access points such as library web pages and in relation to newer challenges such as our growing use of digital resources. As well, the working group will establish a procedure for reporting and investigation of OPAC errors.

Measures of Success for Goal 16:

- By the last year of the strategic plan there will be fewer OPAC errors reported than in the 1st year.
- The relationship between the OPAC and other access points (e.g. library web pages, the AtoZ list) will be clearly defined through written policy and procedures.

Goal 17: Increase resources and awareness for Library web services.

Many positive comments were received on the Library's web presence, and most suggestions that have come forward have focused on augmenting the existing site rather than dramatically changing the existing setup. There is some feeling that the Library's web activities are on the fringes operationally while at the same time they are a huge part of our mainstream services. Activities here are designed to clarify and expand existing workflows for the web, and possibly provide some ammunition for a campus audience on the Library's need to retain a strong level of control over web infrastructure.

Objective 17.1: Clarify and expand Library web page design, development and maintenance policies and processes.

Action Strategy 17.1.1: Establish Web Team as a subcommittee of ULAC.

Action Strategy 17.1.2: Work with ITS to investigate the feasibility of decoupling Lotus Notes from the web presentation layer.

Action Strategy 17.1.3: Identify and remove barriers to web publishing.

Action Strategy 17.1.4: Clarify procedures for making and suggesting changes/additions to the Library's web presence.

Measures of Success for Goal 17:

- Comments on web site go directly to Web Team.
- The program for any major web-related conference will use acronyms applicable to web technologies used for Library web site.
- The Library web site will meet W3C and other recognized guidelines for accessibility and best practices, and will not allow the use of templates or any other mechanism to be used without reference to mainstream standards.

Goal 18: Improve the Library's computing environment.

The Leddy Library has become one of the busiest computing facilities on campus. At the same time, off-campus use of Library resources has passed the half-way mark, meaning that more network traffic to licensed content originates on external networks than on local connections. The Library provides close to 250 public stations, mediates on average 1200 bookings a day during the regular term, and matches a patron with electronic content almost once every minute.

The focus groups and LibQUAL survey give ample evidence that the Library's computing infrastructure is considered important to both staff and the Library's user community. Yet there are cracks in this infrastructure. The booking system needs to be updated to reflect the specific hardware/software variations across the Library's computing landscape, the use of the UWIN ID has proved to be enormously popular on public stations, but other signons to public systems are cumbersome and inconsistent. Many ISPs are now implementing strict policies on network access, and this is causing content purchased for the campus community to be unavailable to everyone. As a result, some of our existing setups need to be revamped to reflect a more complex network environment.

Objective 18.1: Take advantage of current and developing technology to enhance and improve services to patrons.

Action Strategy 18.1.1: Extend wireless access throughout the Library (*current status*: some expansion of existing points is planned).

Action Strategy 18.1.2: Develop online activation system for barcodes.

Action Strategy 18.1.3: Provide printing from wireless stations (*current status*: totally unavailable).

Action Strategy 18.1.4: Provide storage services for patrons (*current status*: some communal space is available through *RefWorks* and students have some access to temporary disk space through campus accounts, but most students still use floppies for migrating content).

Action Strategy 18.1.5: Implement Shibboleth and lobby vendors to phase out proxy access to Library content (*current status*: only JSTOR has any support for Shibboleth, and even then, it is in a test environment. The need for Shibboleth will snowball as more campuses find IP authentication is breaking, and as mainstream search providers, such as Google, increasingly target licensed content).

Action Strategy 18.1.6: Run all Library services on port 80 (*current status:* only WebVoyage is operating on a standard port, the Library has been using non-standard ports, as has much of the Internet, for several years. Many ISPs are starting to block non-standard port traffic and the campus firewalls assign this traffic lower priority).

Action Strategy 18.1.7: Develop online sign-up function for Library workshops, e.g. tours, database sessions, RefWorks sessions, RACER, etc. – could also be used for marketing.

Action Strategy 18.1.8: Participate with CFL in current courseware initiatives (*current status:* The library has some input into the selection process for campus courseware).

Action Strategy 18.1.9: Develop better tracking mechanisms for firewall/network issues and changes.

Action Strategy 18.1.10: Increase the number and quality of public workstations (*current status:* major upgrades are proposed for the spring to existing equipment, some Apple equipment will appear early in 2005).

Action Strategy 18.1.11: Add and publicize additional computer peripherals, such as fiche scanners, scanners, CD burners, USB storage devices, etc., and add where media is available but reader is not, e.g. microcard (*current status:* availability of existing equipment not always widely known and not reflected in booking system – booking system has undergone major revision and machines will be in sync for Winter term).

Action Strategy 18.1.12: Push towards single sign-on for campus resources.

Action Strategy 18.1.13: Make laptops available for circulation (*current status:* an ambitious project is before the I.T. Steering committee for a fleet of laptops, fallback is to set this up on smaller scale – popularity demonstrated at Guelph and Concordia).

Action Strategy 18.1.14: Improve options for technical training and networking within the Systems department.

Measures of Success for Goal 18:

- Positive comments from patrons.
- Fewer support calls for network/resource/system access.
- Less use of floppies (and fewer data migration problems).

Goal 19: Improve communication and interaction between staff, patrons, and departments.

This goal possibly overlaps with the work of the Governance and Staff group and others, but our focus here is to bring forward the environmental factors that can greatly impact interactions and communication.

Objective 19.1: Develop and expand opportunities to receive or track patron views on Library services and resources.

Action Strategy 19.1.1: Examine flash points for patron dissatisfaction that are caused by the Library's infrastructure and policies to determine if there are adjustments or changes that can be made to reduce patron frustration (e.g. noise levels, maximum 60 cent refund for photocopiers, exit gate security setup).

Action Strategy 19.1.2: Establish a working group between Access Services and Reference Services to investigate service interaction and workflow to ensure patrons are not "bounced" back and forth for service.

Measures of Success for Goal 19:

- Reduce negative comments in LibQUAL.
- Staff will feel empowered to help bring about change in problem areas, e.g. layout of public service points.

Goal 20: Establish public tracking measures.

It is clear from the overwhelming number of comments and feedback from the LibQUAL survey that the Library's patron community has feedback that they want to share, and that the campus reacts positively to opportunities to provide input, even if the input itself is not always positive. At the same time, patterns of use and patron preferences are captured almost every minute by systems currently deployed in production. There need to be better ways to foster and make use of this information in workflows and service planning.

Objective 20.1: Encourage and facilitate a variety of means by which patrons can provide feedback to the Library.

Action Strategy 20.1.1: Hook into public tracking measures to track patron perception of Library services and make these perceptions known to all staff.

Action Strategy 20.1.2: The Leddy Library will participate in the LibQUAL survey every two to three years, and the process and results will be given a higher campus profile.

Action Strategy 20.1.3: The results from previous surveys will be organized and made available online, and new surveys will have quicker turnaround time in disseminating the results to the campus.

Action Strategy 20.1.4: The feasibility of establishing a programme in the library to hire students to gather feedback from patrons (i.e. other students) will be examined. For example, the library might mount a user feedback campaign that ties in to the availability of the coffee shop, e.g. “got a beef with the Library, have a coffee on us to tell us about it”, “got feedback, we got coffee”, etc. This is a low cost and proven measure for gathering data on patron perception of services.

Action Strategy 20.1.5: Data currently captured on campus will be exposed through mechanisms that allow less formal methods of acquiring it, i.e., RSS feeds, web access, etc. This will lessen the need to request formal reports and lower the requirement to slog through the appendages of departmental reports.

Action Strategy 20.1.6: The feasibility of self-service course reserves will be evaluated.

Measures of Success for Goal 20:

- Staff will have a strong sense of campus perceptions of Library service.
- Patrons will report in forthcoming LibQUAL surveys that they feel that the Library listens to them.
- Staff will have a sense of what services are used most and where there are shortfalls.

Goal 21: Improve photocopy and printing services

The Library generates an enormous amount of paper output via printing and photocopiers, and many patrons focus on these services more than almost any other. The printing situation has improved dramatically this year but there are still service issues such as identifying jobs at print stations and the occasional patron who swaps station identification signs as a joke. The photocopiers are often out of service, and the service itself seems to be removed from any direct feedback loops to the supplier.

Objective 21.1: Investigate new options for printing/photocopying services and establish timely mechanisms to maintain current printing/photocopying options.

Action Strategy 21.1.1: Report to Purchasing Services monthly on Library issues with photocopy services.

Action Strategy 21.1.2: Investigate the use of scanners and network printing to add more options for making digital copies of physical materials.

Action Strategy 21.1.3: Align photocopy services with printing services as possible, i.e. similar charging, etc. (*current status:* there is an existing committee looking at this).

Action Strategy 21.1.4: Prepare submission for University negotiations with photocopy vendors.

Measures of Success for Goal 21:

- Reduction in “out of service” photocopy machines.
- Positive comments on changes in photocopier availability.
- Increased throughput in printing services.

Goal 22: Align and promote in-house print collections and interlibrary loan services.

An increasing amount of the Library’s traffic is taking place in the digital realm, yet some mechanisms that currently favour digital content, e.g. SFX, have options for accommodating print materials and requesting material that is not available in Library holdings. The digital infrastructure for providing access to print materials can also benefit from improvements.

Objective 22.1: Take advantage of information technologies to improve and promote interlibrary loan services at the Ledy Library.

Action Strategy 22.1.1: Investigate adding print holdings to SFX.

Action Strategy 22.1.2: Explore possibility of changing SFX parser to pull content dynamically from Voyager.

Action Strategy 22.1.3: Implement virtual maps for the location of materials (*current status:* maps have been created for this, commitment needed for shelf-range maintenance).

Action Strategy 22.1.4: Streamline access to RACER, and work with OCUL to integrate RACER into SFX.

Action Strategy 22.1.5: Publicize ILL services and offer RACER tutorials at the beginning of each semester.

Action Strategy 22.1.6: Consider free ILL/document delivery for undergraduates.

Action Strategy 22.1.7: Revamp the “suggestion box” to encourage patrons to suggest more monograph titles for purchase.

Action Strategy 22.1.8: Evaluate the “new books” table and consider redeployment.

Action Strategy 22.1.9: Develop hooks for non-digital content in the A-Z journal list.

Action Strategy 22.1.10: Empower more staff to help patrons on each floor locate material and assist with navigational questions.

Measures of Success for Goal 22:

- Physical collection will see more traffic.
- Less complaints about the difficulty of finding material.
- SFX will be a source for statistics on physical materials.
- ILL use will rise.

Goal 23: Extend Library hours.

The Library has greatly extended its hours, yet the LibQUAL survey and other feedback argues for even greater availability. In fact, it seems clear that most students would be the most happy if the Library was open 24/7. We feel that the Library should seriously investigate the possibility of 24/7 access or other arrangements for increasing the number of open hours offered.

Objective 23.1: Investigate the parameters involved with extending Library hours.

Action Strategy 23.1.1: Determine the feasibility of offering 24/7 access.

Action Strategy 23.1.2: Cost out other arrangements, for example: Friday-Sunday until 2am; Sunday until 2am, which would target some of the Library’s busiest periods.

Action Strategy 23.1.3: Evaluate patterns of use (e.g. are more patrons leaving at closing time than show up during the Library’s early hours?).

Measures of Success for Goal 23:

- There will be documentation to prove, or disprove, the feasibility of 24/7 access.
- Opening hours will be closely aligned with use patterns.

Goal 24: Create a “peer-to-peer” student service for peak times of Library use.

The Library occupies an incredible amount of space in the knowledge cycle, and we know from our surveys and observations that students now rely on us for both content provision and access to appropriate computer infrastructure. We provide much desired support in most areas, yet some of the tasks associated with learning in a university setting, like formatting a bibliography in a particular style or writing certain types of reports, fall outside of the typical reference function. The ITS Student Helpers have been of tremendous benefit to the Library for providing technical support of software/hardware, and this, on a smaller scale, is a viable model for setting up a student-based level of support for writing and putting together assignments.

Objective 24.1: Investigate the parameters of providing additional peer-to-peer help services in the Library.

Action Strategy 24.1.1: Investigate, with Student Services, the possibility of providing in Ledy a student group that could provide assistance in areas like academic writing, for example, third and fourth year students with an English major.

Action Strategy 24.1.2: Assuming 24.1.1 above is implemented, create and publicize a schedule for student helpers to assist with assignment preparation and general writing skills.

Action Strategy 24.1.3: Monitor patterns of use and adjust schedule as needed.

Measures of Success for Goal 24:

- Students will make fewer unfilled requests for help with writing and formatting assignments.
- There will be positive feedback for this service.

Focal Issue 4: Space and Facilities

In its consideration of issues pertaining to Space and Facilities, the members of the committee reviewed much of the available documentation, including the previous Strategic Plan, Five-Year Plans and the more recent Focus Group results and Retreat comments.

It was determined that the first priority would be to re-establish the Library Space Committee. The Terms of Reference of the previous committee appear valid, though because this is a ULAC committee, there may be some wish to review the Terms at a ULAC meeting.

Leddy Library Space Committee / Terms of Reference (May 2001)

Mandate: The primary purpose of the Leddy Library Space Committee is to plan and make recommendations for the optimal use of Library building space for collections and people.

Membership: The Committee shall consist of one representative from each department in the Library: Access, Administration, Acq/Bib, Collections, Reference, and Systems. Representatives are appointed for one-year terms with the possibility of renewal. A list of members shall be provided annually to ULAC for information. A Chairperson shall be elected from among the Committee members by the Committee members. Additional resource people will be consulted as needed for developing particular plans and recommendations.

Reporting Structure: The committee will present their plans and recommendations to ULAC for approval. The Committee will report annually to ULAC.

It was determined by this Strategic Planning Committee that its role in this process would not be to recommend objectives of a specific nature pertaining to space and facilities in the Library, but rather to recommend objectives of a more general nature – leaving the specifics of implementation to the reconstituted Library Space Committee.

The primary areas of concern identified by this Strategic Planning Committee were as follows

1. Space considerations:
 - a) staff space
 - b) collections space
 - c) computer space

- d) meeting space
- e) teaching space
- f) study space (group; individual open; individual private)

2. Security

3. Signage

4. Cleanliness

Goal 25: To identify poorly-used space in the Library buildings and bring forward recommendations for a more effective and efficient use of space.

The committee felt that a coordinated effort should be undertaken to review the use of space in both buildings, and in all six areas identified (staff, collections, computer, meeting, teaching, study), with the intent of devising an overall plan for the best and most efficient use of space by all stakeholders.

Objective 25.1: To make the best use of space in the Library buildings in order to ensure collections are properly housed and effectively managed for growth; ensure effective, logical and efficient access and service for patrons; and ensure adequate and effective work space is provided for all Library staff.

Action Strategy 25.1.1: Re-visit proposals for renovation and/or building projects that had been identified as concerns through previous space planning or this strategic planning process, and, as well, identify new concerns. Develop proposals for addressing them. These concerns include but are not limited to:

- Construction of a new library building to address long term 'people' needs such as group study, individual study, offices, classrooms, conference facilities, etc., as well as long term collections needs.
- Renovation and rationalization of the entrance to the library to create a more welcoming lobby and at the same time to address relevant circulation desk needs and related traffic patterns with the café.
- Expansion and/or relocation of the Archives and Special Collections area to address long term space needs (e.g. storage, secured public areas, etc.).
- Analysis of current use of space on the second and third floors of the main building especially with respect to the private study carrels and offices on those floors.
- Continuing evaluation of staff work space and recommending renovations accordingly.

Measures of Success for Goal 25:

- Positive feedback on the building and its layout will come forward from campus surveys and patron comments.
- Staff will put forward positive comments on changes made to work areas in the next five-year planning process.

Goal 26: To establish adequate security measures commensurate with the current level of use and function of the Library buildings.

With the introduction of extended hours for the Library and the installation of an increasing amount of computer related equipment in both Library buildings, the need for a coordinated approach to security issues continues to be an ongoing issue. The safety of Library staff and patrons, as well as the security of Library property, requires a firm and clear plan for security measures to be developed and implemented.

Objective 26.1: Investigate mechanisms and policies to more clearly establish security for Library patrons, staff and resources.

Action Strategy 26.1.1: Undertake a full safety audit of both Library buildings with respect to security needs both personal and property.

Action Strategy 26.1.2: Investigate the parameters of establishing an official security presence in the Library buildings during all or some of set hours of operation.

Action Strategy 26.1.3: Meet with head of Campus Community Police to explore options for security at the Library and to identify concomitant resource requirements.

Action Strategy 26.1.4: Investigate the potential of using key cards for specific doors in buildings to enhance key control and minimize potential duplication.

Action Strategy 26.1.5: Re-evaluate public address system and video surveillance in light of improvements to technology and reduction in costs for infrastructure.

Action Strategy 26.1.6: Enforce noise and food policies with credible resources.

Measures of Success for Goal 26:

- Statistical measurements will indicate a decrease in the amount of theft, the need for Campus Community Police assistance to deal with behavioral problems, and the number of complaints by staff and patrons regarding threats to personal safety.
- The Library will be recognized as a safer environment.

Goal 27: To enhance access and use of Library collections and buildings with well-designed and well-placed signage.

Although the problem of excess and poorly designed signage has been identified for some time, no coordinated effort to address this problem has yet been undertaken. Signage, properly designed and implemented, can be a powerful tool in assisting patrons as they make use of the Library collection. Signage can also be used effectively to convey certain core Library policies that may have an effect on patrons. A coordinated effort to address the use of signage in the Library to the benefit of patrons and staff alike should be undertaken.

Objective 27.1: To clear the buildings of superfluous signage and begin a process of reintroducing signs which will serve to improve access for patrons to Library buildings, collections, staff and service points.

Action Strategy 27.1.1: Work with Public Affairs & Communications to develop a uniform, standardized signage system for the Library buildings.

Action Strategy 27.1.2: Display details of the Library Behaviour Code at the Library entrance in a clear and visible fashion.

Action Strategy 27.1.3: Establish a directory at the Library entrance to identify service points, teaching spaces, offices, staff, and other commonly sought information about the buildings.

Action Strategy 27.1.4: Investigate the requirements for installing an electronic sign at or near the Library entrance for daily message alerts pertaining to systems difficulties, events in the Library, etc.

Measures of Success for Goal 27:

- Reduction in directional requests posed by patrons.
- Increase in compliance with Library Behaviour Code policies, specifically pertaining to food consumption.

Goal 28: To dramatically improve the cleanliness of the Library.

An increase in the hours of opening, increased student numbers and the introduction of a cafe in the Library has had a substantial impact on the amount of garbage generated in the Library buildings. Increased use of facilities such as washrooms has requires a more intensified response by maintenance staff. Simply put – more people equals a need for more maintenance. This committee recognizes that the management of maintenance staff and resources falls outside of the Library Administration’s area of authority; however, the need to have some input into how those resources are allocated throughout the Library seems imperative.

Objective 28.1: Utilize all appropriate campus resources to ensure that Library buildings are frequently and regularly cleaned.

Action Strategy 28.1.1: Identify priorities for cleaning tasks in the Library buildings based on observations of Library and maintenance staff.

Action Strategy 28.1.2: Plan and organize a priority-based cleaning schedule with physical plant managers for implementation by maintenance staff.

Action Strategy 28.1.3: Review use of signage as a deterrent and investigate effective signage techniques to encourage patrons and staff to maintain a clean environment.

Action Strategy 28.1.4: Review traffic patterns and use of the café area in an attempt to contain consumption of food.

Action Strategy 28.1.5: Ensure that when a maintenance staff member is unable to work their regularly scheduled shift, Library Administration is informed. This will establish clear communications between maintenance and library staff and provide an opportunity to address issues as they occur.

Action Strategy 28.1.6: Explore with maintenance staff the possibility of posting cleaning schedules for the public washrooms in those washrooms to inform our patrons that regular cleaning is taking place.

Measures of Success for Goal 28

- Decrease in complaints received regarding cleanliness.

Goal 29: Improve Study Space Services.

The “library as place” has continually been a major theme in the Library’s surveys and other patron/staff feedback mechanisms since 1993, and was reflected strongly throughout the LibQUAL survey. Although there are campus factors inherent in providing communal space, particularly funding, it is possible that there is a combination of low barrier/cost additions to study space that can be achieved now, along with a general lobbying strategy to secure greater campus investment.

Objective 29.1: Provide a variety of study spaces in the Leddy Library to meet the needs of patrons.

Action Strategy 29.1.1: Revamp study rooms to be more effective group spaces with better furniture, availability of workstations, projectors, etc.

Action Strategy 29.1.2: Investigate the use and availability of coat/locker facilities.

Action Strategy 29.1.3: Address cleanliness issues publicly, and work with student groups and others to lobby for more resources to provide a welcoming environment.

Action Strategy 29.1.4: Carry out furniture inventory and measure lighting levels, prioritize areas of the Library for improvement and investment.

Action Strategy 29.1.5: Establish and publicize noise policies and procedures for dealing with infringements.

Action Strategy 29.1.6: Provide online booking for study spaces, and options for individual study space.

Measures of Success for Goal 29:

- Physical appearance of the Library improves to the point that it is noticed and commented upon by staff and patrons.
- Fewer complaints about noise come forward.
- Noise levels change dramatically upon entering quiet areas of the Library.