Western Libraries:
Library-as-Place & Place-as-Library
Strategic Plan 2007-08 – 2010-11
Revised August 2008

Setting Directions

Building on the strategic directions identified in the 2003 operational plan Honouring the Past, Challenging the Present, Creating the Future: Strategic Directions for Western Libraries, our new strategic plan for 2007-08 to 2010-11 aligns our priorities more closely with the overall University strategic directions in key areas identified in Western’s strategic plan Engaging the Future (2006):

- Enhancing the best student experience
- Expanding and enriching the experience of graduate students
- Building the research-intensive university

The planning process for the University is a collaborative one that identifies priorities and links budget decisions to those priorities and that also evaluates progress toward outcomes identified by individual units and the University as a whole. Our annual budget submissions relate directly to the strategic directions set by Western Libraries. The University-level response to our budget submissions will involve the allocation of resources that allows joint progress towards the strategic directions and successful achievement of outcomes outlined in the strategic plans for Western Libraries and the University.

Our strategic directions will require a careful balance between the library-as-place (the physical library represented by our seven physical locations) and the place-as-library (the digital library providing access anything/anywhere/anytime) as welcoming places that engage our faculty, staff and students in three broad areas:

- Research and Scholarship
- Teaching and Learning
- Support to the University Community, Key Partners, Alumni and the Community-at-large

The University's general themes of interdisciplinary, pan-University initiatives, and internationalization will shape the design and implementation of initiatives in these broad areas.

Mission

Western Libraries is committed to excellence: anticipating information and service needs related to the University’s goals for research and scholarship, teaching and learning, and service to our university community and key partners. Our staff engages the Western academic community in the development of new services, and continuously strives to exceed the expectations of our diverse user groups.

Vision

Western Libraries will be a leader in providing both the best library-as-place and the best place-as-library experience for the Western academic community.
Building on Past Strengths and Successes

Western Libraries is recognized for the quality and extent of its information resources and the value-added services our staff provides. Some of the outstanding successes during the strategic planning cycle that is ending demonstrate areas of strength.

Western Libraries has clearly demonstrated the power of collaborative partnerships in extending our digital collections and in enhancing access to them in collaboration with other academic institutions through the Ontario Council of University Libraries (OCUL) and the Canadian Association of Research Libraries (CARL). OCUL’s Scholars Portal is a truly successful consortial achievement created with funding support from both the federal and provincial governments. Scholars Portal currently offers our academic community access to the full text content of over 11 million journal articles, as well as to key support tools such as the online ILL management system RACER, the SFX Link Resolver (Get It @ Western) and RefWorks Citation Manager. At the local level, collaborative initiatives with our Affiliated University Colleges have been a great success with our Shared Library Catalogue and ongoing contributions to electronic resources by the affiliates.

The staff of Western Libraries is a major asset in terms of quality of service and depth of knowledge. Our staff has built an extremely strong culture of service and this has been recognized by students in the Globe & Mail University Report Card surveys since 2002.

Since the inception of the surveys of our own graduating students, students have ranked Western Libraries highly, with scores at or near the top in all applicable library categories: web access, staff assistance, collections support for courses, and effectiveness of library instruction. The survey has consistently ranked ‘Library staff provide helpful assistance’ as number one.

For the survey question ‘Library instruction improved research skills’, we have moved up in the ranking, demonstrating the impact of the priority we have placed on, and will continue to place on, information literacy. The opening of the Teaching Support Centre (TSC) within the Weldon Library was the outcome of the very successful collaboration of the former Educational Development Office, Information Technology Services and Western Libraries. The TSC provides a “one-stop shopping” location for faculty and graduate teaching assistants who wish to enhance their teaching or develop new curriculum, incorporating pedagogical best practices, information technology and information literacy instruction.

We have demonstrated our leadership on campus and among other Canadian academic libraries in providing innovative approaches to library, archival and records management services. One recent award that we have celebrated with pride is the 2006 Canadian Library Association/3M Award for Achievement in Technical Services to our Library Technical Services staff, for an innovative use of the Z39.50 protocol to streamline acquisitions processes, thereby reducing ordering time for resources from four days to one day.

A new service desk model was developed for the Taylor Library that combined Reference and Circulation Desk services in a single location to serve as the first point of contact for in-library service. Already in existence in some of the smaller libraries, the model was subsequently adopted in the Music Library, Education Library, and the Archives and Research Collections Centre (ARCC). With the opening of the Weldon Service Desk this fall, this model will be common to all locations, providing one convenient service location for students, faculty and staff. Similar
enhancement of service was introduced for the digital library user with the introduction of a re-designed web site for Western Libraries and all its locations, providing improved navigation and appearance.

A new phase and an enhancement of the librarian and archivist roles in the Western community came with the ratification of the first Collective Agreement in September 2006. This agreement recognizes librarians and archivists as academic staff and provides them with opportunity to engage in academic activity relevant to librarianship and archival practice. It will allow librarians and archivists to self manage their work and increase the potential for relationship building with faculty and researchers within the strategic directions established for the University and Western Libraries.

The ARCC began providing service in October 2003, with the official opening celebrated on April 6, 2004. Designed to provide optimum environmental conditions for storing the University’s research materials, it is home to low and medium use materials that have been transferred from the six library locations on campus. It also includes the J. J. Talman Regional Collection, The James Alexander and Ellen Rae Benson Special Collections and the University Archives. One of the most popular and successful services offered by Western Archives is the records centre. Available at no cost to all academic and administrative units on campus, it provides central records storage and retrieval services to support the effective management of semi-active university records. Although physically transferred to the custody of Western Archives, these records are not part of the archival holdings of the University. They remain the property of each transferring unit and access is restricted to authorized staff from that unit. As required, the records can be retrieved for short-term reference or reactivation. Many academic and administrative units that have transferred their records to storage have benefited from the re-use of space in their locations to accommodate new faculty, staff and services. The transfer of library materials to the ARCC also enabled the liberation of considerable space within the Weldon and Taylor Libraries in particular and the refurbishment of that space to accommodate the higher enrolments that came with the increased cohort.

We have had considerable fund raising success that has included both monetary donations and gifts-in-kind. November 9th, 2005 marked a special occasion to honour Sun Microsystems of Canada Inc. and celebrate a major gift of over half a million dollars to Western Libraries of 450 Sun Ray Thin Client Workstations backed by new servers and operating system. As the latest in thin client technology this was important in providing the best in-library student experience.

Underlying all these successes Western Libraries has been quietly and consistently developing a culture of assessment. An existing position was realigned to form the position of Assessment Librarian in 2005 and further supported with the formation of an Assessment Committee later that same year. Outcomes-based assessment has been integrated into our strategic and operational planning initiatives. Western Libraries has demonstrated that “we are listening” to Western faculty, students and staff, and enhancing services and resources in response to community feedback. The Association of Research Libraries LibQUAL+™ survey of 2004 supplied data and feedback from our user community that we used to improve services. Overall our users told us that they were satisfied with the library services and resources, and that staff throughout the seven service locations are responsive in helping with their library needs. Many also provided good suggestions to improve specific services. For example, many commented about the lack of cleanliness of the two large libraries in particular. Working with the Physical Plant Department and with the allocation of additional caretaking staff we were able to dramatically improve the situation during the 2005/06 academic year. To further develop the assessment program, Western Libraries participated with
24 other Association of Research Libraries (ARL) in a project “Making Library Assessment Work: Practical Approaches for Developing and Sustaining Effective Assessment” in May 2006. The recommendations from the report of the ARL Visiting Program Officers are providing a framework for moving assessment forward at Western Libraries.

Building on these successes and our strengths, and aligned with the University’s strategic directions and priorities, we are confident in being able to meet the challenges of new directions and priorities subject to having adequate resources.

**Strategic Directions and Priorities for 2007-08 to 2010-11**

**Research and Scholarship**

Western Libraries is an integral component of Western’s research infrastructure: our primary and secondary research resources (archival, print, and electronic collections) are of top priority for our researchers (faculty and graduate students) and Western’s research intensity aspirations, as more and better access to these resources extends the capacity for research. Western Libraries will need to build on the existing infrastructure while exploring scholarly communication partnerships (open access publishing, data curation for future re-use and rediscovery of research data, and other future initiatives). In these areas Western Libraries will give greater priority to programs that enhance graduate student education and will experiment with liaison programs with selected research teams.

**Information Resources – Priorities and Expected Outcomes**

- Continued growth of our digital information resource base through consortial arrangements and by means of our own purchases or license agreements. The digital library remains a priority and has room to grow, especially in the areas of arts, humanities and social sciences. Western is a participant in the 67 institution application made by the Canadian Research Knowledge Network (CRKN) for Canadian Foundation for Innovation (CFI) funding of $50 million dollars over three years commencing 2007/08 with a focus on social sciences and humanities content.

- We will focus on growing electronic book resources using methods similar to those used for electronic journals: through the collaborative power of OCUL’s Scholars Portal, other consortia arrangements and our own initiatives.

- Support for and access to the resources that become available through AlouetteCanada, an open digitization initiative that has the goal of providing easy online access to the extraordinary wealth of written and other records by and about Canadians.

- Selective Western digitization projects for our own unique resources. Increasingly Western researchers requiring access to these resources will rely on desktop delivery that will provide opportunities for textual analysis and involve multimedia objects. This will lend itself to collaborative initiatives with researchers for the purpose of digitizing specific unique resources that will support Western researchers and in turn make these resources available internationally.

- Selective growth of print collections of sufficient depth to support research and graduate education balanced with undergraduate collections needs. Of particular importance will be building print collections, or finding alternative means for providing access to print
resources, for new areas of research, new graduate programs, and new programs that respond to the University’s interdisciplinary and internationalization initiatives. The latter may require additional language resources.

- Maintenance, preservation and selective enhancement of physical research collections. Although publication rates are slowing, it is clear that physical research resources will still need to be collected and preserved for research purposes into the foreseeable future. The high-density storage facility, a component of the ARCC, will continue to provide a cost effective and important quality service that responds to this need. This will be combined with selective conservation initiatives designed to address, on a priority basis, the most significant needs within our unique collections.

- Preservation of digital resources will be achieved primarily through the collaborative OCUL’s Scholars Portal project, and our own institutional repository for local “born digital” and/or “born again digital” (digitized versions of unique resources).

- A new approach to interlibrary loan (ILL) that will incorporate purchase of ILL requested materials along with the traditional ILL borrowing of resources from other institutions.

- Support for research in defined priority areas using unique primary sources will be enhanced through a review of archival appraisal and acquisition policies. This will be accompanied by improvement in access to existing archival holdings through improved description. Where appropriate, this will involve cooperation with community partners.

**Scholarly Communication – Priorities and Expected Outcomes**

- Western will have a culture supportive of open access to scholarly communication. Western Libraries will strongly promote and support open access to electronic research publications so that results of publicly-funded research are available free-of-charge to all Canadians and international researchers at large. The Canadian Institutes of Health Research (CIHR) has recently rolled out its draft policy for CIHR funded research outputs that requires grant and award holders to make every effort to ensure peer-reviewed journal publications are freely available. Western Libraries was a founding member of SPARC (Scholarly Publishing and Academic Resources Coalition) initiated by the Association of Research Libraries (ARL) to facilitate competition in scientific communication through the creation of high-quality alternatives to commercially published journals. Western has also supported initiatives such as Berkeley Electronic Press (bepress) and BioMed Central and will continue to be advocates for such initiatives. Western Libraries will work collaboratively with Research Western to achieve a method of managing publication costs for Western’s researchers who publish in open access electronic journals.

- Implementation of an institutional repository that will support digital scholarship and facilitate the creation of new ways to manage digital content including audio, visual and text based content. As a first step, in support of the University emphasis on graduate education, Western Libraries will coordinate the development of an institutional repository, initially based on Western’s graduate dissertations. Western is a leader in retroactively digitizing its dissertations. To carry this into the future, Western Libraries will collaborate closely with the Faculty of Graduate Studies to initiate the submission of ‘born digital’ theses. This will facilitate the submission of theses, improve the speed at which these can become available to others, and reduce the many redundancies currently followed in the submission of print theses. Individual units and research groups will also be encouraged and supported to establish ‘communities’ under the umbrella of the institutional repository in order to make their own materials accessible to a wider audience.
• E-scholarship exploration. With the establishment of an institutional repository, Western Libraries will explore new directions in digital publishing in particular in support of the emerging area of scholarship of teaching and learning. In collaboration with the Teaching Support Centre, Western Libraries will assist in launching a new journal that will publish peer-reviewed articles on Canadian scholarship related to teaching and learning in a wide variety of disciplines. This will provide opportunities for librarians and archivists to fulfill their new academic activity responsibilities through publication of scholarship pertaining to information literacy, a stated area of priority in our previous strategic plan that will continue as a priority in this new strategic plan.

• In consultation with faculty colleagues, the University Legal Counsel, and Research Western, Western Libraries will provide leadership in advocacy and educational efforts related to copyright developments. Through collaboration with other Ontario Council of University Libraries and the Canadian Association of Research Libraries, advocacy initiatives will influence legislation and judicial decisions governing the use of copyrighted materials so that they better meet the needs of research institutions.

• In collaboration with Research Western, Western Libraries will develop mechanisms for librarian and archivist to provide proactive communications about what they can contribute to researchers and the research process, e.g., through a virtual (web-based) presence or through in-person attendance at research team meetings, office visits, etc.

• In collaboration with Research Western, librarians and archivists will develop ways to consolidate information about new and emerging areas of Western research interest and make these visible to the Western community at large. Most importantly, this will provide a base on which Western Libraries is able to respond to new and emerging areas of research. This may involve the revitalization of Leaders in Learning: Publications of Faculty & Staff.

Research Liaison – Priorities and Expected Outcomes

• The University Librarian to serve on the University Research Board in order to foster closer liaison with Research Western and improve communications about Western’s research goals.

• Western Libraries will develop greater visibility and a strong advocacy program to raise awareness of the contribution that librarians and archivists can bring to the graduate education process, in particular, the scholarly communication and information research process.

• Engagement with graduate students and faculty researchers to understand individual, discipline specific and interdisciplinary needs in order to select and develop graduate information literacy programs that will integrate information discovery skills into the graduate curriculum.

• Librarians and archivists will build relationships that will allow for collaboration with selected research teams (including those of a community, interdisciplinary and/or international nature) to assess information needs leading to innovative ways of leveraging knowledge sharing and the development of value-added services. Because of the collaborative nature of the team-based services it will be possible to design services that are responsive to the research groups’ specialized needs and may include modules designed to provide some or all of the following: an introduction to Western Libraries and its resources and services; the scholarly communication process; search strategies; selecting subject databases; identifying key research papers; library research for the literature review; keeping current with scholarly literature; writing the research paper; and, the ethical use of information.


**Teaching and Learning**

Our priorities in this area include (a) increased emphasis on Western Libraries’ collaborative partnerships with faculty, especially in communicating and marketing of undergraduate instructional/information literacy programs that we offer and (b) greater priority to programs that enhance graduate student information literacy. We will explore and increase opportunities for faculty engagement to integrate information literacy skill development into the fabric of courses, programs and curricula. The emphasis will be on value-added point-of-need teaching that emphasizes development of critical research and information discovery skills. The focus on student engagement will require the development of needs-based programs, teaching and services that will stimulate student interest in developing competencies related to the retrieval, analysis, evaluation and ethical application of information. The ultimate goal is to prepare the student not only for academic success but also for lifelong learning.

E-learning (electronic learning) is of increasing importance in the higher education environment. E-learning is a “term covering a wide set of applications and processes, such as Web-based learning, computer-based learning, virtual classrooms, and digital collaboration. It includes the delivery of content via Internet, intranet/extranet (LAN/WAN), audio- and video-tape, satellite broadcast, interactive TV, CD-ROM, and more.” (CARL 2005) E-learning covers the spectrum of courses offered fully online or in combination with in-class instruction. Our challenge will be in balancing face-to-face initiatives with digital delivery of programs and services while engaging our community of users in both the library-as-place and the place-as-library.

Of increasing importance is the internationalization of our Western community. A one-size-fits-all teaching and learning environment must change to incorporate individualized information literacy and instructional services that respond to a wide range of international student needs related to language, cultural differences, and prior (and often very different) experiences with information discovery.

An emerging area of importance for librarians and archivists offering opportunities for collaboration with faculty relates to research aimed at improving the quality of teaching and learning in higher education. “The scholarship of teaching and learning contributes to knowledge about teaching and learning in every discipline, informs evidence-based practice, and responds to calls for increased accountability with respect to postsecondary teaching. When conducted on a program or institutional scale, the scholarship of teaching and learning seeks to assess the impact on student learning of curriculum reform, pedagogical innovation, new instructional media, and classroom design.” (Society for Teaching and Learning in Higher Education (STLHE) 2005).

**Instructional Services – Priorities and Expected Outcomes**

- Librarian and archivist collaboration with faculty in curriculum design to improve undergraduate student competencies related to the retrieval, analysis, evaluation and ethical application of information in their course work.
- Engagement with students in the classroom whenever the opportunity arises to encourage students to ask for additional assistance at point of need, either in the library-as-place or the place-as-library.
- Graduate student information literacy programs, both general and discipline specific. This may include collections of generic tutorials that can be used for a variety of applications, especially multidisciplinary applications.
• Indirect support for undergraduate students as a result of instructional and other information literacy services for faculty and graduate teaching assistants.
• E-learning developments including the integration of e-resources into online learning modules and web instructional resources.
• Instructional services that respond to a wide range of international student needs related to language, cultural differences, and prior (and often very different) experiences with information discovery.
• Establishment of a research basis for librarians and archivists by raising awareness of the scholarship of teaching and learning.

Information Access – Priorities and Expected Outcomes

• New and improved accessibility to digital and physical resources. Fully implement and optimize use of collaborative initiatives such as OCUL’s Scholars Portal suite of products and services that allow for enhanced access to information resources. In the short term the Scholars Portal federated search functionality will be a focus in this priority area; however, ongoing technology improvements and functionality will likely lead to further and faster dramatic improvements to accessibility to a wide range of e-resources.
• Development and implementation of an effective structure for online information exploration, discovery and sharing for Western. A needs assessment has been undertaken by an Information Discovery Working Group to find out about the Western community and how we access information and how local preference relates to information discovery, for the purpose of developing an action plan for shaping a revised Western Libraries’ web presence that responds to those needs. We will develop and implement a new web presence and seek to upgrade our existing catalogue (part of our integrated library system) based on those findings and recommendations.
• A new Research and Scholarship division incorporating the Library Information Technology Services department in collaboration with librarians and archivists who have an interest in research and development, will plan and implement an IT infrastructure that will enable seamless access to information. Ideally the new environment will be highly customizable, personalized and allow for differentiated services in order to facilitate engagement and relationship building with Western’s teaching, learning and research communities.
• Priority will be given to ensuring access to all previously acquired information resources in addition to ongoing additions to the collections (purchased and donated).
• Marketing and communications strategies identifying newly accessible information resources will be undertaken in parallel with access initiatives in order to brand quality resources made available as a result of Western funding priorities.
• Western Libraries will seek University-level support to make accessible to the larger Western academic community research resources housed in a number of campus resource centres. Making such resources more widely accessible through the online catalogue leverages the University investment in these centres.

Student Services – Priorities and Expected Outcomes

• Western Libraries support for Western’s goal of providing the ‘best student experience’ through enhanced student services. This will be led by the Western Libraries Student Services Liaison Librarian who has started to build working relationships with student service groups, in particular those represented within the Student Development Services
portfolio (Services for Students with Disabilities, First Nations Services, International Student Services, Effective Writing Program, Learning Skills Services).

• Build an information relationship during the planning phase for the new International Centre on campus. This will be accomplished by means of needs assessments to ascertain information resource and service support followed by the planning and implementation of a program that responds to the identified needs.

• Engagement with the Teaching Support Centre with regard to any role that Western Libraries may play in new service learning and career services initiatives.

• Western Libraries will offer service learning opportunities through deployment of Faculty of Information & Media Studies co-op students and through other collaborative programs that provide for short term internships.

• Western Libraries will continue to employ students, providing an opportunity to work in a part time position that either matches their ambitions or inspires them to consider a career in libraries or archives.

Library-as-Place – Priorities and Expected Outcomes

• Our physical libraries will continue to provide an excellent level of service for undergraduates in particular: an environment conducive to study and research, access to information technology infrastructure, and physical space devoted to group and individual study needs. To improve that environment we will engage and collaborate with undergraduate students and student groups in developing a common understanding of respectful and courteous use of the space in support of differentiated needs (quiet study, silent study, group discussion/study).

• Our two large libraries, The D. B. Weldon Library (serving the Faculties of Arts & Humanities, Social Science and Information and Media Studies) and the Allyn & Betty Taylor Library (serving the Faculties of Engineering, Health Sciences and Sciences, and the Schulich School of Medicine & Dentistry) are already interdisciplinary spaces that in recent years have been configured to largely serve the needs of undergraduate students during the increased cohort years and will continue to respond to these needs. The libraries provide essential facilities and services in the form of hours of opening, photocopying, circulation of materials, student and consultation space, reference and in-library instruction in the use of information resources. Gate counts will continue to rise as students discover and appreciate enhanced physical facilities resulting from the recent funding for that purpose.

• Into the future, graduate student and faculty needs will drive the development of a different type of space, separate from the undergraduate areas. Our user committees for these two libraries have voiced the need for a combination of quiet study space, community space for small group discussion and space for consultation with librarians/archivists away from the noise and traffic of service desks. Because of the nature of their needs, graduate students and faculty are known to place the greatest demands on our services.

Place-as-Library – Priorities and Expected Outcomes

• The place-as-library (anything/anywhere/anytime) will be further enhanced with new web-based services allowing differentiation, customization and/or personalization in response to very diverse user needs.

• The information behaviours and preferences of the user communities we serve will be foundational to the creation and delivery of programs and services that can be tailored to
particular needs of our users who access our services and resources from their laboratories, residences, homes, hospitals and offices. The “library has left the building” program will see librarians regularly visit other academic community spaces in campus buildings in order to be available for assistance from those areas. Enhancement and expansion of previous office visit programs may respond to some service needs of faculty, graduate students and research teams in their own space.

- Collaboration with Academic Programmers in student residences in the development of learning communities and to make students in residence aware of library services that support them in their learning.
- The pan-university aspiration for increased service learning that extends the learning experience beyond the university into external communities (local, national and international) will lead to new Western Libraries initiatives that support students and their learning needs in the field and other external workplaces.
- A different type of partnership (different funding, different parameters) will be fostered through the development of the Western Ontario Health Knowledge Network (WOHKN). Taylor Library will provide leadership for WOHKN that will advance collaboration between Western Libraries and University Affiliated Hospital Libraries to ensure that library services are efficiently planned and developed, directed, coordinated, and inter-related within available resources. The purpose is to provide improved and equal access to current, evidence-based information throughout the region for all health care providers across the continuum of care, as well as for students and researchers. Information professionals/health librarians can provide specialized expertise and play a key role in user training and support for clinical, evidence-based decision-making.

Support to the University Community, Key Partners, Alumni, and Community-at-large

Our priorities for this area begin with service to the University community in support of the growing administrative needs of both academic and administrative units through various archives and records management programs and services. This includes ongoing access to information from historical sources, provision of central records storage and retrieval services, and staff expertise and assistance.

Western Libraries has built a solid foundation for collaboration with our Affiliated University College Libraries with our Shared Library Catalogue initiatives and collaboration in the purchase of packages of digital information resources. We will continue to build on this foundation as the opportunity arises.

Collaborative partnerships with Western’s Research Institutes, Teaching Hospitals and other institutions are placing increasing pressures on our resources and services. The priority has shifted to the delivery of networked services and information resources and that is introducing challenges to funding such services.

Western Libraries will continue to build and cultivate relationships with Western’s alumni, retirees, faculty, students and external communities to ensure continued success and enhancement of Western Libraries for future generations.
Records Management Services for the University Community – Priorities and Expected Outcomes

- Western Libraries will continue to support the growing administrative needs of both academic and administrative units through various records management programs and services. This includes ongoing provision of central records storage and retrieval services to respond to the increasing demands to release space for re-allocation. Although the ARCC currently provides sufficient space for all functions, should demand grow to the point where space for research collections is limited, this service can also be provided by a combination of on-site storage and coordination of off-site/private sector services.
- Records storage and retrieval will be complemented by efficient destruction of non-archival records following a formal review and approval process.
- Related support for business process improvement will be provided through various records management tools, including digitization to improve workflow (in conjunction with Western Information Systems Group (WISG), as well as a wide range of records management advisory services. A major goal is to complete the development and implementation of a full set of function-based records retention and disposal schedules, under the auspices of the President’s Advisory Committee on University Records and Archives (PACURA). It is anticipated that there will also be an ongoing requirement to provide records management support to Western’s Freedom of Information and Privacy (FOIP) program.

Services to Affiliated University College Libraries – Priorities and Expected Outcomes

- Collaboration in investigation and implementation of next generation library technologies to enhance information discovery: a replacement for the current Shared Library Catalogue.
- Further collaborative opportunities to expand access to electronic ‘packages’ of full-text journals, electronic books, etc.

Services to Other Affiliated Institutions – Priorities and Expected Outcomes

Western’s affiliation agreements with its Research Institutes and Teaching Hospitals have provided access to information resources for Western faculty and researchers based in those affiliated institutes.

Building on the existing general library and health information responsibilities to those individual researchers, students and faculty, a new relationship between the Hospitals and the University, through the Western Ontario Health Knowledge Network (WOHKN) is being developed. This is a collaborative, voluntary partnership comprised of the University Affiliated Hospital Libraries within the Southwestern Ontario region with Western Libraries playing a key leadership role in ensuring library services are efficiently planned and developed, directed, coordinated, and inter-related within available resources. Key to the success of this new initiative will be funding to support the efficient integration, management and further development of digital health resources and specialized library services to be available for the various Hospital and University user groups.

- The partnership seeks to enhance student experience in the clinical teaching and research sites through improved and integrated access to information and highly specialized librarian services.
Alumni Services – Priorities and Expected Outcomes

- A Friends of Western Libraries Committee will build and cultivate relationships with Western’s alumni, retirees, faculty, students and external communities to ensure continued success and enhancement of Western Libraries for future generations.
- Western Libraries, in collaboration with Alumni Affairs and Development, will continue to engage local alumni with subject-based workshops of interest.
- Provision of access to most electronic resources in-library, and expansion of access to online resources to our international and distant alumni communities as soon as a stable delivery platform becomes available.
- Web based services focussed on topics of interest to alumni utilizing technologies appropriate to the service: web documents, audio files, video files, and web casts.

Achieving Our Strategic Priorities and Outcomes

Organizational Framework

One of the strategies that will support Western Libraries in the successful achievement of its strategic priorities and outcomes will be a re-alignment of its administrative organizational structure to ensure outcomes are achieved in the three key areas.

A new division will be established and led by an Associate University Librarian (Research and Scholarship). Key priorities for this new division are the development of a culture supportive of open access to scholarly communication and the establishment and promotion of an institutional repository. Roles of the two current Associate University Librarians – for Information Services and Information Resources – will be re-aligned and re-named to reflect priorities. The University Archivist will continue to lead the division incorporating the University Archives, Regional and Special collections services, and the records management services.

Our Staff

Increasing our staff complement is critical to the achievement of our outcomes. To increase student engagement opportunities we must improve the student/staff ratio. In order to develop selective new programs in support of graduate students and researchers, and to avoid diverting our staff resources from existing undergraduate instructional programs, we will seek to increase the number of full time librarian, archivist and other staff positions to ensure we can support this University priority. A spousal incentive recruitment program similar to that provided for faculty recruitment will be investigated. Often, a librarian or archivist is the spouse/partner of new faculty or a new librarian/archivist. It is proposed that a program of financial support be established to facilitate appointment opportunities of appropriate, well-qualified librarians/archivists who are spouses/partners of faculty or other librarians/archivists within the University.

Of particular importance during this strategic planning cycle will be the development of the next generation of librarians and archivists. This follows from the ratification of the first Librarians and Archivists Collective Agreement on September 26, 2006.

The Collective Agreement recognizes academic status for librarians and archivists and recognizes that they directly support the University’s mission through their roles. As academic librarians and
archivists they share in and contribute to the academic outcomes (teaching and research) of the University. The Collective Agreement provides them with opportunity to engage in academic activity relevant to librarianship and archival practice. An emerging area of importance for librarians and archivists offering opportunities for academic activity and collaboration with faculty relates to research aimed at improving the quality of teaching and learning in higher education. “The scholarship of teaching and learning contributes to knowledge about teaching and learning in every discipline, informs evidence-based practice, and responds to calls for increased accountability with respect to postsecondary teaching. When conducted on a program or institutional scale, the scholarship of teaching and learning seeks to assess the impact on student learning of curriculum reform, pedagogical innovation, new instructional media, and classroom design.” (Society for Teaching and Learning in Higher Education (STLHE) 2005).

Increasingly the work of librarians/archivists involves collaboration with faculty in the teaching process to plan library/information instruction that is relevant and specific to course assignments, and that enable the student to acquire information literacy competencies for lifelong learning. Research has shown that the integration of information seeking skills with course assignments provides the best learning experience. Librarians and archivists have for many years provided ‘one shot’ presentations on types of resources and how to find and use them effectively. However, at the speed at which new digital resources become accessible to our users, the seemingly endless resources freely available on the Web, and the wide variety of search interfaces for those resources, more complex instruction is now needed on how to locate the best quality resources, how to assess the reliability of the information that is located and how to use that information ethically in assignments. For instructional purposes, it may also be necessary to arrange for additional licences to allow access to course specific resources for limited time frames. This all adds up to a more integrated role for the librarian/archivist in the teaching process. Western Libraries will support librarians and archivists as they seek to build collegial and collaborative teaching relationships with faculty.

Librarians and archivists have also been involved in the selection and collection of information resources in all formats, including electronic, in support of the programs and research priorities of the University. In some institutions, collection development is still undertaken by faculty for some or all subject areas, whereas for Western Libraries it has long been part of the role and responsibilities of the librarian/archivist and continues to involve considerable liaison with faculty. The work of the librarian involves monitoring program changes and research priorities and altering collections policies and practices accordingly. An important new aspect in this area is the need to monitor trends in scholarly communication: electronic publishing, open access, and copyright legislation. The establishment of Western Archives in 2001 also introduced a new role of records archivist, a role that is key to improved access to the University’s administrative record and archives, along with greater administrative effectiveness and efficiencies.

Western Libraries will also advocate for the skills and expertise that librarians/archivists can bring to support research, through a similar emphasis on graduate student information literacy. An emerging need that has been identified is liaison with researchers and research teams to explore information resource and access needs and services. The staff of Western Libraries is recognized as a major strength. Consequently, Western Libraries is also committed to a proactive program of staff development to encourage and retain important staff expertise essential to the successful achievement of the outcomes indicated for each of our priorities. A key factor in our success will be a staff recruitment, retention and realignment strategy to ensure that we have the appropriate staff resources dedicated to each of the priorities. Finally,
we will provide a supportive workplace environment that fosters staff engagement in the Western and Western Libraries strategic planning process and multi-year planning cycle.

Western Libraries will also work to ensure that our staff have current role descriptions and regular performance evaluations that focus on competencies, accountabilities for outcomes, and that recognize valued attributes including integrity, creativity, initiative, and collaboration at all levels.

Outcomes:

- An organizational structure that will move Western Libraries forward to the successful achievement of its stated outcomes in priority areas.
- Improved student/staff ratio and student engagement through an increase in librarian, archivist and other staff positions especially in areas of direct service to students.
- Support for a spousal incentive program for librarian/archivist recruitment.
- Advocacy for the librarian/archivist role and the nature of the services that the librarian/archivist can bring to the teaching, learning and research processes, especially in the place-as-library (anything/anywhere/anytime) environment.
- Communication channels that support staff and leaders in their roles and that enable workplace health and safety.
- Encouragement and provision of leadership, career and skills development opportunities that will retain and engage our staff enthusiastically in their workplace environment.
- Recognition of the talent, knowledge and dedication of our staff and the value of their contributions to the achievement of our outcomes.
- Development of strong team-based relationships within each location and that also cut across all Western Libraries' locations.

Space Planning

Long range space planning is a significant component of the next four-year planning cycle as Western Libraries’ space is primarily used for academic purposes. We will need to make more effective use of existing space as we seek to liberate space for graduate student and faculty needs. We will need to review space requirements for collections, records centre, and staff use. Collaborative opportunities will be explored in order to ensure that community spaces being considered for the campus also consider ‘the library has left the building’ program needs. To achieve the most efficient use of space we will seek the services of a space consultant to review existing space use in libraries that were not designed to accommodate current needs, in order to obtain comprehensive recommendations for appropriate reallocations, refurbishment and/or renovations that will be in line with our strategic directions and priorities.

Outcomes:

- Space consultant review of current use of space by Western Libraries
- Space priorities identified during the 2003/04 – 2006/07 multi-year plan will be included in the review and continue to be included until implementation: new/upgraded Music Library and Business Library facilities.
- Space plan that will align space use with strategic directions and priorities.
- Space plan that will incorporate student, faculty, Western Libraries staff and administrative space needs and collections space needs.
- Contingency plan for providing records centre storage space through alternative means.
- Potential consolidation of all low/medium use collections in the ARCC.
Next Generation Library Information Technologies

Library systems and information technology infrastructure and services are critical to the achievement of outcomes in each of the broad areas in which we have identified priorities. We must plan for and begin to implement the next generation of library information technologies in order to optimize access to and use of our existing collections (both physical and digital).

Outcomes:

- Implementation of a phased-in approach to Radio Frequency Identification (RFID) to synchronize with the University i-Class Western One card initiative, to make checkouts easier for users, to maintain collections in correct sequence so that users and staff can locate materials, to introduce a more efficient inventory control process to optimize library acquisitions investment by the University, and to alleviate repetitive strain injuries among staff. Western Libraries has been preparing the way for the eventual implementation of the technology by ensuring new self-checkout equipment currently being purchased accommodates RFID functionality.

- User-centred web site re-design that will enhance information exploration and discovery and greatly improve access to Western Libraries’ online services and information resources. The goal is to develop a web presence that will incorporate technologies that enhance the users’ experiences and engagement with Western Libraries.

- An upgraded integrated library system and/or more flexible and powerful web interfaces to the existing system and services that will enhance the user experience during the information discovery to delivery process.

Western Libraries Advancement

Outcomes:

- Establishing goals and targets for the next major fundraising campaign for 2007-2010 that will support the Western Libraries’ and the University’s strategic aspirations.

- Growing Western Libraries endowment funds in order to support collections and operational projects into the future.

- Development of relationships that will foster gifts-in-kind, including archival collections that will provide primary resources for research purposes.

Measuring our Success

Operating within a culture of assessment, our strategic plan incorporates and integrates performance indicators (quantitative and qualitative) for priorities in each of the key areas to provide benchmarks that will allow us to measure and validate the outcomes and impact of our proposed actions.

Library performance indicators for use at the institutional level include library data (if available) from the National Survey of Student Engagement (NSSE) and the Graduate and Professional Student Survey (GPSS); and the Consortium for Student Retention Data Exchange (CSRDE).

Other performance indicators currently available to the academic library community also will be used for Western Libraries: a wide range of ARL quantitative indicators; ARL LibQUAL+™ survey
data providing qualitative data; Ontario Council of University Libraries (OCUL) Scholars Portal survey data supplying both quantitative and qualitative information; and, library questions on the Western Survey of Graduating Students.

As the University places a priority on library acquisitions Western Libraries places a priority on assessment of the quality, quantity and use of our collections. ARL data have been used in the past to measure the extent/quantity of collections and the size of library acquisitions expenditures. There is now a greater need for usage and qualitative data. There is also the need for collections analysis tools that will allow for ongoing analysis of existing collections, especially electronic packages, in order to avoid redundancy and to optimize spending of acquisitions funds. An important new development for Western Libraries is the OCUL plan to implement mechanisms to monitor use of Scholars Portal services and to solicit input and feedback from end users. This Scholars Portal data, in conjunction with data available from our own Web Management and Electronic Resource Management reports, will allow for further optimization of library acquisitions expenditures.

Performance indicators that will provide general measures related to the academic quality of undergraduate education outcomes include the Ontario Council of Academic Vice Presidents (OCAV) University Undergraduate Degree Level Expectations, in conjunction with the Association of College and Research Libraries (ACRL) Information Literacy standards. For graduate education, indicators are derived from Ontario Council on Graduate Studies (OCGS) program review and graduate degree expectations; cyclical external peer review of Departments, Schools, and Faculties; and, accreditation of professional programs, as all require and include assessment of the extent and depth of information resources in support of the programs.

Western Libraries will also use selective needs assessments targeted to specific groups using a variety of techniques: focus groups, usability studies, web surveys or one-on-one consultation. Action plans will be developed based on needs assessments followed by implementation of programs with the process coming full circle by assessing how successful we are in meeting the identified needs while simultaneously identifying further improvements. Priority will be given to needs assessments and development of assessment initiatives related to graduate students and research teams, or initiatives related to identified specialist information needs (language resources, new research publications/databases, archival services, etc.).

The identification of data and testimonials related to service quality for records centre activities, alumni services, and services to the community-at-large will be selective.

Outcomes:

- A Western Libraries Assessment Plan that is an integral part of the strategic planning process.
- Performance indicators that meet both the University-level needs and our own internal needs to measure the extent and quality of collections, services, and use of space.
- Priority given to engaging our librarians/archivists and leaders in the assessment action plan in order to obtain qualitative and quantitative data so that we can make informed decisions for achieving our strategic priorities and measure how successful we are at meeting identified needs in priority areas.
Appendix 1  
The Strategic Planning Process

2005

Planning for the development of the new strategic plan commenced in March 2005 with discussions involving Western Libraries Executive Committee and Peggy Roffey from Learning and Development to plan for all-staff sessions to introduce the development of the new strategic plan. Preparations included an all-day retreat for Leader/Managers and members of the Library Staff Development Committee in May to develop the content for the August sessions. The agenda for the all-staff sessions August 24-25, 2005 included presentations by the President and the Provost and provided staff with the opportunity to learn about and share the President’s and Provost’s views of Western’s strategic priorities and to consider implications for Western Libraries. Presentations from a number of graduate students also provided insights into the graduate education process.

During September/October 2005, based on feedback from the staff sessions, a preliminary draft of the strategic plan was produced for ongoing engagement with staff at the unit level and further refinement. The first draft of the strategic plan was submitted to the Provost as part of the planning submission in November 2005. The draft was also posted to the Western Libraries staff intranet.

2006

During March 2006 the draft strategic plan was again reviewed and discussed at the unit level and library committees, led by Leader/Managers, and further feedback was provided to the executive. A review of the summary academic plans was made to ensure that the Western Libraries draft plan was in line with academic priorities. A revised draft of the plan was then discussed in meetings of the many Western Libraries User Groups: The D. B. Weldon Library Users Group, Allyn & Betty Taylor User Group, President’s Advisory Committee on University Records and Archives, etc. Feedback from those groups has helped in re-shaping this final plan.

At all-staff sessions held August 16-17, 2006, staff had an opportunity to learn about the role of Western Libraries within a research intensive university environment. Presentations were made by Dr. Gerald Kidder (Associate Vice-President (Research)) about Western's Strategic Research priorities and aspects of the research process, and from researchers in different disciplines: Dr. Mark McDayter (Department of English) and Dr. Eric Savory (Department of Mechanical and Materials Engineering). Staff considered what the presenters had to say in relation to the draft Western Libraries strategic plan and offered further feedback about how we could reshape the plan.

In conjunction with a review of the draft report of the University Task Force on Strategic Planning Engaging the Future, this final version of the strategic plan was completed in preparation for the multi-year planning submission in November 2006.

2007

Library staff continued to be actively involved in the ongoing implementation of the strategic plan through participation in annual staff planning sessions. The theme of the 2007 sessions was Library-as-Place/Place-as-Library and offered excellent presentations. Michael Ridley, Chief Information Officer and Chief Librarian, University of Guelph, spoke on Nurturing Community: the
Opportunities of Academic Libraries in Virtual and Physical Space where libraries exist in ‘permanent beta’ and where there is a need to look at new tools to promote access to and discovery of the wealth of available information resources. A second theme was the concept of the library as the ‘academic town square’ or a community space where the academic community meets and interacts to exchange ideas and perspectives and to create new areas of knowledge and understanding. The concept of community space was further developed within the broader Western context by Jerry White and Duncan Hunter. In his presentation Creating Social Learning Space: from Theory to Practice Jerry White moved from the theory of social learning space to discussing why we need this kind of space. He also talked about how social learning fits into Western’s planning for physical and virtual space. Duncan Hunter picked up that theme and talked about the Campus Master Plan and the opportunities provided within that plan to create community/social learning space. All three speakers challenged staff to imagine, dream, and become engaged in the possibilities created by the changing library and academic environments.

The summary strategic plan was also modified in November 2007 to reflect minor changes made in conjunction with its review as part of the Planning Submission for 2008-09 to 2010-11.

2008

Library staff continued to be actively involved in the ongoing implementation of the strategic plan through participation in annual staff planning sessions. The theme of the 2008 session was The User Experience featuring keynote speaker Serena Rosenhan from ProQuest with her presentation: Observing Student Researchers in Their Native Habitat. Complementing her presentation was “Don’t Make Me Think!” Websites for Users, the presentation of the Next Generation Website Implementation Team from Western Libraries relating the user experience to the roll out of the new Western Libraries website and its user-centred design process. The staff sessions also provided an opportunity for the roll out of phase 2 of Western Libraries organizational restructuring, clearly aligning the new organizational structure with the strategic plan priorities.

The strategic plan was revisited and minor changes made in August 2008 to align it with the changes made to the Summary Strategic Plan in 2007, for the purpose of synchronizing the documentation in preparation for the Senate Review of Western Libraries.