



Dalhousie University Libraries

Strategic Plan

2001 – 2003

*The results of discussions and planning sessions
held between 1999 – 2001*

Contents

Introduction

4.....	Our Environment
6.....	Our Mission
6.....	Our Vision

Strategic Directions

8.....	Connect with Customers
9.....	Optimize Our Services and Collections
11.....	Raise Our Profile
11.....	Upgrade Our Physical and Electronic Infrastructure
12.....	Develop Effective Organizational Supports

Next Steps

14.....	
---------	--

Strategic Directions Summary

15.....	
---------	--

Introduction

The Dalhousie Libraries Strategic Plan reaffirms our intention to remain a pre-eminent Canadian research library known for the strength of its resources and people and its willingness to embrace new ideas and partnerships to meet the information needs of our users.

The Plan places before the community our response to a set of existing conditions affecting higher education, information technology, scholarly communications and, of course, libraries. It provides a vision of what we think we should become in order to meet the information needs of the scholarly community. It describes an environment which has taxed our existing resources and strategies to the limit and demanded new approaches for solving old and new problems. The Mission of the Libraries states clearly, for the benefit of our community and ourselves, our purpose and key role.

The ultimate purpose of the plan is to ensure the libraries operate with a common objective and to provide benchmarks for the achievement of excellence by the libraries and the university.

The Libraries' Strategic Plan was developed initially with planning and focus sessions in 1999-2000 and further refined in 2000-2001. A wide cross-section of staff from all the libraries participated along with representatives from the faculty, students and Computing Services. As the preliminary plan developed it was made available to the Senate Library Committee and later posted in draft form to the Library's web site for further comment from the community.

The Plan is intended to be a starting point rather than a completed work. Every year it will be re-examined and updated as necessary to reflect changes in our environment and new needs of our users. It sets a framework for active and effective response as an assurance of our continuing relevance in a period of great flux.

William R. Maes
University Librarian

June 2001

Our Environment

Focus sessions were held with groups representing a variety of members of the university community in order to identify key challenges facing the libraries, to obtain their impressions of the Dalhousie libraries as they exist today and to provide some advice for the future. They reflect problems and opportunities affecting many academic libraries across the country.

1. External Trends

The groups identified five principal external trends:

1. continued rapid change—the digital revolution, growth of the Internet, shift from print medium to electronic media, quick obsolescence of some areas of knowledge
2. increasing availability of information delivered in electronic form
3. increasing demand for remote access
4. continuing rising cost of obtaining certain types of information—cost of journals, user fees
5. rising expectations—for simplicity, for quick and easy access

As a result, it is expected:

- the location or repository of information will be less important than its accessibility
- physical libraries will no longer be the academic or social “centre” of universities
- while the role of libraries will change, the role of librarians will not

2. Strengths

The Libraries have some excellent strengths on which to build:

- history, reputation, and location at Dalhousie
- generally good collections
- Novanet and good document delivery services
- continuing pursuit of increased electronic access
- friendly, helpful and knowledgeable staff
- proximity to computer services
- proximity to the School of Library and Information Studies

3. Weaknesses

The Libraries, however, also have several weaknesses which might restrict their ability to plan and implement effectively:

- tradition and governing structure make radical change difficult
- budget constraints—under funded relative to comparable research universities in Canada
- the collections are small and dated (a particular problem with journals)
- inability to fully and effectively exploit advances in technology
- physical plant is generally inadequate and unappealing
- equipment is often dated and poorly maintained
- lack of understanding of customer preferences
- lack of marketing focus
- staff recalcitrance

4. Information Sources in the Future

When queried about what will constitute the best information sources in the future, the groups responded that:

- people will get information from the “best” sources, regardless of physical location
- more and more information will be retrieved in electronic formats from more user-friendly databases
- more services will be delivered to the customer’s desktop
- librarians will have the same role but more in servicing the needs of the above three trends

5. Perceptions of the Libraries

Asked how the principal users (students and faculty) perceived the libraries, three themes emerged:

- Intimidating both in terms of physical set-up and service access (especially true of the Killam)
- Poor and deteriorating state of collections
- Insufficient support for electronic information access

6. Advice for the Libraries

The groups suggested seven actions for the libraries to pursue in any further planning:

1. Determine how other libraries are “coping” (best practices)
2. Make a case to the University Administration for more support
3. Expand Novanet
4. Provide more introductory sessions to students—make the libraries more friendly (integrate better into classes)
5. Establish and deliver an information / library skills course
6. Do user studies
7. Assess the feasibility of physical plant upgrading

Our Mission

To promote learning in our community by providing expert and innovative access to the world's information and knowledge

The libraries are active participants in furthering the learning and research agenda of the university. With an increasing emphasis on learner-centred environments and the need to provide learners with the tools and skills to access an ever more complex information environment, the libraries are charged with providing the expertise and innovative solutions required to provide efficient and uncomplicated access to the world's information and knowledge.

“Research” is understood to be incorporated under “learning” in the libraries’ mission statement.

Our Vision

“We are Dalhousie’s Information Gateway”

We, the Dalhousie University Libraries, are central to all members of the Dalhousie University community. We are the gateway to regional, national and global resources.

We provide innovative, friendly, and responsive services both on and off-site. We promote outreach and community-based initiatives. We anticipate and actively seek opportunities to respond to the needs of our community.

We are partners in the learning environment. We take a leadership role in the university and professional communities through the teaching of knowledge management skills and by facilitating access to the best information resources.

We are a cohesive and well-run organization with a well-trained staff and excellent working conditions.

What the Vision Means

- *“We, the Dalhousie University Libraries, are central to all members of the Dalhousie University community. We are the gateway to regional, national and global resources.”* – The libraries are central to meeting the information needs of students and faculty in their learning, teaching and research. We will strive to provide the tools, expertise and resources which will allow the community to acquire and/or access the world’s scholarly information resources wherever they exist and whenever they are needed.
- *“We provide innovative, friendly, and responsive services both on and off-site.”* -- The community we serve matches in breadth the community the university serves both on campus and at a distance. We will strive to provide friendly services to all our users and attempt to satisfy their information and service needs to the best of our ability. We will embrace change and seek opportunities to ensure the best means of solving information problems.
- *“We promote outreach and community-based initiatives”.* – The libraries understand and respond to the information needs of the professions, supported by the teaching and research in our professional schools. In this role we also more directly serve the wider community of the Atlantic region.
- *“We anticipate and actively seek opportunities to respond to the needs of our community.”* – The libraries do not envision themselves as passive players in the teaching and research mission of the university. Within the context of our mission, we will do whatever possible to enhance the learning and research experience of our community by continuously improving our staff, tools and resources.
- *“We are partners in the learning environment”.* – The libraries know that by partnering with faculty and others they can significantly contribute to improved learning and research outcomes. By partnering with other libraries and consortia they can also significantly improve their ability to provide access to other collections and improved services.
- *“We take a leadership role in the university and professional communities through the teaching of knowledge management skills and by facilitating access to the best information resources.”* – In the increasingly complex information environment of today, skills in the management of knowledge and the search for information are essential to the efficiency and effectiveness of research and learning. The libraries are uniquely situated to provide those skills and to provide an environment where access to the best information is as uncomplicated as possible.
- *“ We are a cohesive and well-run organization with a well-trained staff and excellent working conditions.”* – In order for the libraries to fulfill their mission and achieve their objectives in support of the learning community, their staffs must maintain their competence and have the resources, environment and administrative support to accomplish their duties. It is the obligation of university and library administration to ensure they receive what is needed to get the job done.

Strategic Directions

The Mission and Vision have a long term perspective and describe that which we do and that to which we aspire. The Strategic Directions have a more immediate focus and were agreed upon as key issues emanating from our environmental scan which need to be addressed in the near future as important first steps towards reaching our vision.

STRATEGIC DIRECTION 1: Connect with Customers

OBJECTIVE: To ensure that our customers always see us as the starting point for meeting their information needs.

(A lengthy and spirited discussion was held regarding the use of the word “customer” in referring to those the libraries serve. Currently, terms used include “users,” “clients,” “customers,” and “patrons.” Each term reflects a different attitude and service philosophy. While no agreement was reached, it was clear the term selected will both reflect and determine the Dalhousie University Libraries’ service approach. Further discussion is required and for the time being the terms are used interchangeably and without bias.)

Major Task 1.1: Become a visible presence on and off campus

The libraries need to do a better job of making the community aware of their resources and services. In developing a “Communications Plan” for the libraries, a group of students in the Faculty of Management discovered that knowledge of the libraries and what they had to offer was seriously lacking among students in the Faculty. They recommended an intensive campaign of promotion judging that many students at both the undergraduate and graduate level were missing critical information resources and skills to help them in their research and future job prospects.

The libraries will introduce a distinctive logo (in process) to help identify their services and resources more clearly. They will produce more library communications reporting on new initiatives, accomplishments, electronic resources, etc., and ensure they are more prominently featured in existing university publications. The libraries will be prominent in any recruitment campaigns for new faculty and students. More attention will be paid to creating consistent but distinctive signage in and on library facilities.

Major Task 1.2: Establish and meet service standards

The Dalhousie libraries represent a system serving a variety of communities with both common and specific needs. In such an environment it is easy for collection standards and standards of service to diverge. Faculty, students and staff must be assured that high levels of service, standards of practice and good collections are maintained in all the libraries. Charges and fees, for example, should be consistent throughout the system as well as the availability of staff and technological resources.

Major Task 1.3: Become technology leaders through the “wow” factor

Beginning with the technologies of printing and the book libraries have relied heavily on technology to acquire, preserve and disseminate information and knowledge. In this digital age, we must continue to acquire and experiment with new technologies and the opportunities they provide in order to develop new and better services and improve on existing ones. Most recently computing and communications technologies have enabled us to launch and participate in a national site licensing project aimed at reducing costs and increasing journal access for all participants. We will leverage opportunities provided through the application of innovative software to add value to our services (e.g., MyLibrary, LivePerson, Relais interlibrary loan software, etc.) As leaders in the implementation and use of new technologies we will be able to meet the information needs of our community now and into the future within existing resource constraints and enhance both faculty and student recruitment for the university.

Major Task 1.4: Partner with faculty, researchers, competitors and other campus services

There is no more effective means to become more closely connected with our community than through active partnering at all levels. In collaboration with faculty we will seek to increase the number of web-based reading lists and library tutorials aimed at students learning and doing research in specific subject areas. We will seek greater collaboration with Computing Services to increase and simplify access to electronic library resources from computer labs, offices and residences. More help from students will be sought in library development projects and understanding user needs. Closer links will be forged with the School of Library and Information Studies and their expertise solicited in improving all facets of the libraries’ operations.

Library staff will increase their presence in Faculties and offer more on-site instruction and solutions to information problems.

STRATEGIC DIRECTION 2: Optimize our Services and Collections

OBJECTIVE: To become the indispensable information experts by meeting customer and stakeholder information needs.

Major Task 2.1: Improve access to expanded resources and collections

The continuing expansion of on-site collections and access to global information resources are central to the libraries’ mission. We will seek involvement in more partnerships and consortial agreements that will increase the amount and quality of scholarly information available to the community. At the same time we will press the university and the faculty for more support for the libraries’ acquisitions budgets which have not kept pace with the rate of inflation for many years and which have failed to acknowledge the continuing actual growth in the type and quantity of information available.

To improve access to existing physical and online resources, the libraries will seek improvements to their library management system (GEAC / Novanet), extend reference service and opening hours and improve the web interface to their many online resources. Some of this work is already well underway.

Major Task 2.2: Reassess physical organization of library services / collections to promote independent use

Library collections do not typically grow in linear fashion. At times discrete collections or even whole libraries are integrated or amalgamated disturbing the normal call number sequences. Over a period of years, the number of anomalies in expected library order grows large making it increasingly difficult for users to navigate independently about the stacks. The libraries must reassess the order of their collections and location of service points to minimize the need for unnecessary staff intervention and dramatically improve ease of use.

Major Task 2.3: Improve products, services and access for distance /online users and simplify navigation

Poor access to library services and resources have traditionally made it more difficult to deliver quality education at a distance. Improvements in technology and the significant increase in the amount of information available electronically are enabling the libraries to address this problem more effectively. The libraries have made a commitment to use the technologies to improve services and access for faculty and students working at a distance. They will strive to make any library service, which is available locally, available remotely (reference, electronic reserve, electronic article ordering, etc.), simplify navigation of library web sites and customize web pages for specific user groups. These initiatives will not only benefit users at a distance but students and faculty on campus as well.

Major Task 2.4: Train stakeholders in content, skills and technology

As the complexity of information access, formats and management grows, there is a need for staff and users to upgrade their information skills continuously. The libraries must upgrade their training facilities and offer different avenues through which to delivery library / information instruction, including the web. A greater awareness must be created in the community of the importance of graduating students with good information literacy skills. The offer of such skills is an added inducement and enrichment for future students.

Major Task 2.5: Promote and improve the management of university—created information

The university community is not only a large consumer but also a creator of information. Efficient records management is of ongoing concern and the libraries through the University Archives will help the university address this issue.

The libraries will attempt to play a greater role in ensuring that university scholarly publications are properly accessioned and disseminated and participate in national and international initiatives to bring the control of scholarly communication back to the universities and faculties.

STRATEGIC DIRECTION 3: Raise our Profile

OBJECTIVE: To build our reputation as the indispensable information experts.

Major Task 3.1: Develop a communications strategy

The libraries will establish a marketing / communications program to ensure that its resources and services are well known and understood throughout the university community. Staff will receive more training in communications skills and in providing “customer service.”

Major Task 3.2: Establish ongoing feedback mechanisms with users, potential users and advisers

The libraries will develop more meaningful statistics and surveys in collaboration with regional and national associations. Focused and more frequent random surveys will be undertaken to solicit users opinions and to better understand their needs. The web will be utilized as another mechanism for collecting statistical and other data and direct user input.

Major Task 3.3: Establish a communications budget

The libraries must create a budget to support their communications initiatives.

STRATEGIC DIRECTION 4: Upgrade our Physical and Electronic Infrastructure

OBJECTIVE: To improve the physical and technological facilities in support of the new learning and work environment.

Major Task 4.1: Establish Information Commons

The establishment of an Information Commons in the Killam Library, with satellite locations in the Kellogg, Sexton and Law Libraries, instantiates the vision of the Dalhousie Libraries as the major players in the acquisition, manipulation, management and dissemination of scholarly information on campus. The Commons will provide a much needed visible technology profile to the campus and establish us as leaders in creating the “high-tech high-touch” libraries of the future.

Major Task 4.2: Establish mechanisms for additions to / upgrading of all equipment

Considering the degree to which all libraries have become dependent on equipment to access and deliver their services and collections, it is imperative they establish mechanisms to ensure that equipment is refurbished or replaced in a timely manner. The dependence has become so great that failure or loss of equipment can render substantial portions of our collections and other information sources totally inaccessible.

Major Task 4.3: Support faculties and departments in obtaining equipment upgrades

As more information resources are being provided in electronic formats, it is imperative that faculty and students have the necessary equipment to access them. Although access is possible from within the libraries, the added value of these formats depends a great deal upon the community being able to use these resources from their labs, offices and homes. In collaboration with Academic Computing Services the libraries will keep the community informed of the hardware and software required to make best use of the electronic resources made available.

Major Task 4.4: Upgrade and expand physical space

All the libraries are becoming overcrowded and are already experiencing significant storage problems. As more space is appropriated for collections, study and meeting spaces for students and faculty are disappearing. To alleviate this problem, without adding expensive new on-campus space, the libraries need to find alternative storage solutions. The shifting of more collections to digital form is one avenue which must be seriously considered as well as an Atlantic regional storage solution in collaboration with other institutions.

Monies need to be found to refurbish existing spaces in all the libraries most of which have not been substantially renovated in over 30 years.

With the increased emphasis upon, and need for, information literacy skills, new and better instructional spaces are required in all the libraries.

Major Task 4.5: Develop an information technology plan

With computing and communications technologies assuming such an important role in the libraries' activities there is a need to develop a plan which will allow us to make the best use of these resources and to ensure that they are most effectively used to help the libraries meet their objectives.

STRATEGIC DIRECTION 5: Develop Effective Organizational Supports

OBJECTIVE: To implement management systems which help staff achieve our strategic directions

Major Task 5.1: Examine the organization structure

Library administration must examine the current library organization to ensure it effectively enables the libraries mission and strategic directions.

Major Task 5.2: Review library processes to improve their efficiency and effectiveness

The libraries employ a great many processes to accomplish their work and objectives. These should be constantly re-examined to ensure that they employ the libraries' staff and resources efficiently and effectively, paying particular attention to new approaches made possible through the continuing development of technologies.

Major Task 5.3: Enhance internal communications

Maintaining sufficient and effective internal communications is an ongoing problem in most organizations. The libraries must strive to communicate more and better internally to facilitate implementation of the plan and the general order of the organization.

Major Task 5.4: Implement staff training programs based on expected levels of competency

Because change in the information sector is so rapid, it is essential the libraries continuously strive to raise the competencies of their staff. A variety of instructional approaches and opportunities need to be offered so that staff will be assured of possessing the skills and training required to maintain the libraries' status as primary information provider to the scholarly community.

Next Steps

The Libraries' Plan is far from comprehensive, given the finite financial and staff resources available to us, and represents only those current critical areas where we see the need to focus our attention over the next few years.

Collections and access to scholarly resources remain an ongoing and primary concern. There is no library today that can expect to provide everything its community needs from within its own walls. Partnerships with other libraries, associations, publishers, government and others will be increasingly necessary and command more of our attention and finances in order to try and meet the continuously growing demand for information in all its forms. The business of growing and maintaining a research library has changed dramatically.

We are heartened by the renewed interest the federal government has shown in support of research. Most recently, through support of the Canadian National Site Licensing Project, both the federal and provincial governments have recognized the need for, and importance of, strong information resources as an underpinning to our scholarly activities. Through the Public Library of Science initiative, PubMed Central and others, the scholarly community is also beginning to help us address the perpetual problem of spiraling costs for access to, and the acquisition of, scholarly works. Much, however, remains to be done and our strategic directions agenda is a reminder of this.

The plan will guide us through some of the difficult choices which will invariably come our way in the next few years as scholarly communication itself continues to undergo a period of important transition on a global basis. It will serve as a framework for all the libraries as they consider the allocation of services and resources at a departmental and individual level.

Current activities and services already begin to address some of the major tasks outlined in the plan. For each of the tasks identified the libraries will develop more specific implementation strategies, timelines and measures of success. Throughout this process we will strive to obtain feedback from our user communities in order to ascertain the benefit of our actions and to take advice on areas for improvement.

Finally, the plan invites the support of the user community. Unless the libraries have that support their efforts are pointless and wasted. We therefore invite all to remain actively involved in what the libraries do and in what they have planned to do.

Strategic Directions Summary

STRATEGIC DIRECTION 1: Connect with Customers

OBJECTIVE: To ensure that our customers always see us as the starting point for meeting their information needs.

Major Task 1.1: Become a visible presence on and off campus

Major Task 1.2: Establish and meet service standards

Major Task 1.3: Become technology leaders through the “wow” factor

Major Task 1.4: Partner with faculty, researchers, competitors and other campus services

STRATEGIC DIRECTION 2: Optimize our Services and Collections

OBJECTIVE: To become the indispensable information experts by meeting customer and stakeholder information needs.

Major Task 2.1: Improve access to expanded resources and collections

Major Task 2.2: Reassess physical organization of library services / collections to promote independent use

Major Task 2.3: Improve products, services and access for distance /online users and simplify navigation

Major Task 2.4: Train stakeholders in content, skills and technology

Major Task 2.5: Promote and improve the management of university created information

STRATEGIC DIRECTION 3: Raise our Profile

OBJECTIVE: To build our reputation as the indispensable information experts.

Major Task 3.1: Develop a communications strategy

Major Task 3.2: Establish ongoing feedback mechanisms with users, potential users and advisers

Major Task 3.3: Establish a communications budget

STRATEGIC DIRECTION 4: Upgrade our Physical and Electronic Infrastructure

OBJECTIVE: To improve the physical and technological facilities in support of the new learning and work environment.

Major Task 4.1: Establish Information Commons

Major Task 4.2: Establish mechanisms for additions to / upgrading of all equipment

Major Task 4.3: Support faculties and departments in obtaining equipment upgrades

Major Task 4.4: Upgrade and expand physical space

Major Task 4.5: Develop an information technology plan

STRATEGIC DIRECTION 5: Develop Effective Organizational Supports

OBJECTIVE: To implement management systems which help staff achieve our strategic directions

Major Task 5.1: Examine the organization structure

Major Task 5.2: Review library processes to improve their efficiency and effectiveness

Major Task 5.3: Enhance internal communications

Major Task 5.4: Implement staff training programs based on expected levels of competency