DRAFT
The University Library Strategic Plan 2011

> Libraries were never warehouses of books. They have been and always will
> be centers of learning. Their central position in the world of learning makes
> them ideally suited to mediate between the printed and digital modes of
> communication. [1] (Robert Darnton, Historian and Harvard University Librarian)

Introduction

Acquiring materials and making them available is the most obvious activity of libraries.
However, facilitating the learning process is the purpose of the modern library. In the past,
libraries were mainly evaluated by the size of their collections, but today the size of a
library's physical collection is almost irrelevant, as the resources available through the
Internet dwarf even the largest libraries. Thus, it is the other activities of libraries that
determine their quality. Many in higher education are reevaluating the purpose of libraries;
this allows the library to create formal methods of communication in which all stakeholders
provide input into library priorities. The library staff has prepared this strategic plan, not as
an end product, but as an invitation to the W&L community to help define the University
Library's future. This plan forms an outline of projects that the library will engage upon and
sets the standards by which it should be evaluated. The projects and standards will change as
technology and the curriculum change. The plan addresses the coming year, but from a
perspective that looks to future years. Therefore, no time period is stated; at the end of each
year, the plan will be formally evaluated in the University Library's Annual Report. The
plan will then be modified in preparation for the following year.

The University Library Mission Statement (2008)

> The University Library aims to be the physical and digital center of
> academic life on the Washington and Lee University campus. Providing
> collections, expertise and technology, the library enables innovation and
> exploration in teaching, research and learning. By offering a welcoming
> staff and facilities and a sophisticated technical infrastructure, the library
> provides access to information reflective of the University's mission and
> assistance in managing information through instruction and personalized
> service.

---

[1] Robert Darnton, *The Case for Books : Past, Present, and Future* (New York: Public Affairs, 2009), XV.

The University Library's Priorities

The library is an educational institution with the unique charge to maintain a comprehensive understanding of scholarly communication. The library's core duty is to enhance, stimulate and support learning; therefore, the library will:

- Develop library collections that support the curriculum and faculty research.
- Develop and integrate library systems to eliminate unnecessary complexity in using library resources and services.
- Integrate library resources to facilitate easy discovery and seamless movement between library resources.
- Provide library services that are the pride of the campus community.
- Provide facilities and technology that enhance student and faculty achievement.
- Teach members of the community the skills needed to effectively use and manage information.
- Assist the University in managing and preserving important digital and physical intellectual assets.
- Achieve greater cooperation with Information Technology Services (ITS), the Law Library, VMI, and other partners to enable the library to be more effective in fulfilling its mission.
- Support the University's mission and strategic plan.

Environmental Scan

The University Library is in a state of transition. The University Librarian retired in 2010, and the library now operates under an interim director. Provost June Aprille will determine the timing and procedures for permanently filling this position. During the transition, the library will define and build upon the foundations that have already been established.

In July 2010, Charles Henry, the President of the Council on Library and Information Resources, visited Washington and Lee to review the library, its services and its relationship with ITS. His report and many of his recommendations have been incorporated into the planning process.

In various settings, the library staff reviewed the environment in which it operates. The most commonly identified problem was the lack of reliable communication. Better methods of communication must be developed both within the library and between the library and the W&L community. Reliable communication with faculty, staff and students is essential, and new methods must be found to communicate information about library resources and services. The library must seek out new ways to engage the members of our community and establish its role as the center of academic life on campus.

Reductions to the library's budget over the past two years have resulted in a decrease in resources and a reduction in new acquisitions. Clearly, this underfunding is affecting the library's ability to achieve its mission, as some academic units are moving on their own to purchase new information resources. This fragmentation of information services must be addressed as it creates a situation of unequal access. It also results in duplication of effort, and in some cases, paying twice for the same resource. The library will examine the

collection for any digital and physical duplication and identify resources that may no longer be needed on campus.

The ease of Internet search engines, like Google, demonstrate the need for a new emphasis to be placed on enhancing the discovery process in library research. Library users indicate that it is too difficult to identify which library resources should be used. New "discovery" tools are available that add a layer to the library catalog that would include many of the University Library's vast electronic resources and make individual resources easier to find. More attention will be given to increasing discovery opportunities to ensure that users find library resources easily. The library must provide the best balance between offering information resources and implementing discovery mechanisms that allow for ease of use for these resources.

The campus is experiencing a space shortage for classrooms and offices, and all facilities are being examined for alternate uses. The library is no exception. The library staff will join the planning efforts to explore how library facilities can be renovated to develop better learning environments and incorporate new functions or departments that will reinforce the role that the library plays on campus.
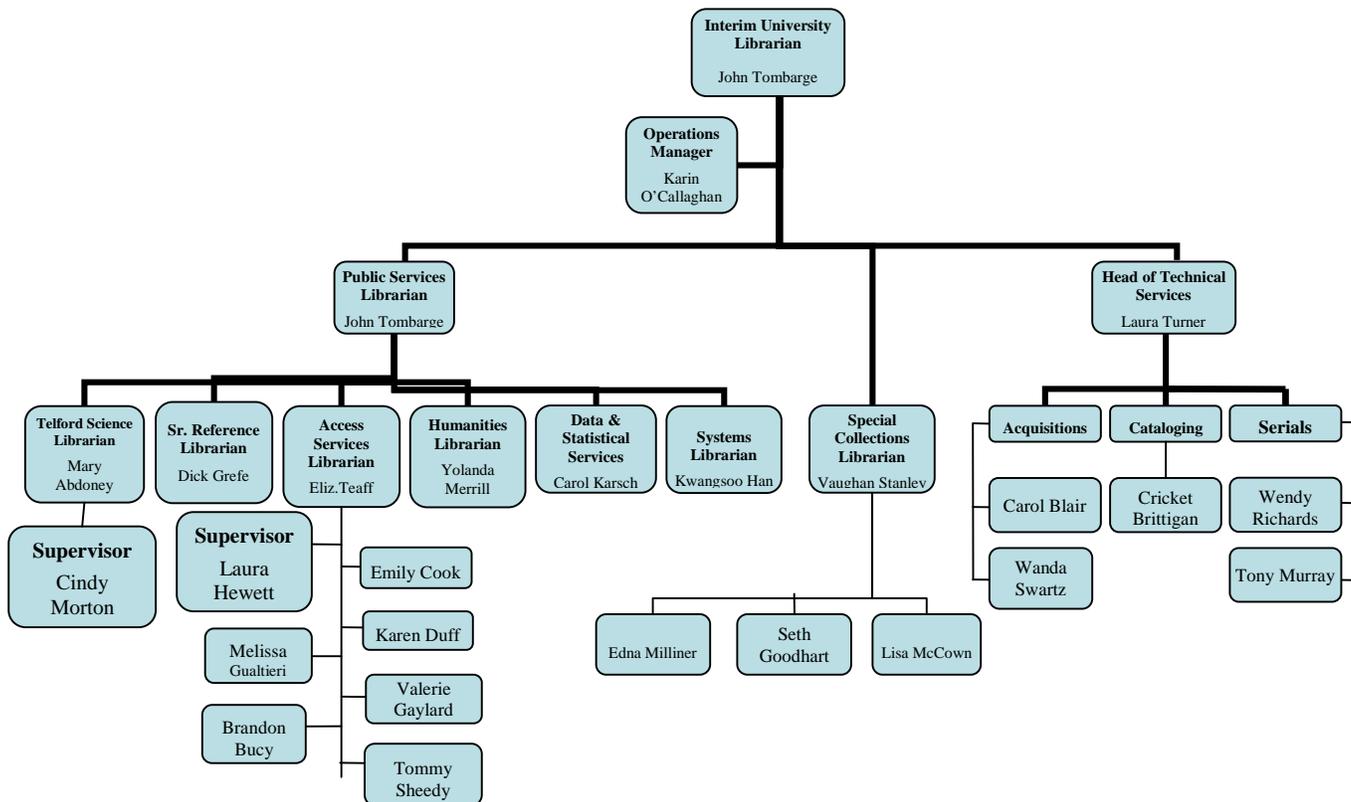
The Information Desk was established as part of Leyburn's renovation of the main level in 2009 to provide a central service point for library and technology services and thereby simplify the use of library and information technology resources. The University Library staff was reorganized in the summer and fall of 2010 to provide more consistent staffing at the Information Desk. Continual training and assessment of service is essential to maintaining the effectiveness at the Information Desk.

The physical design of the Information Desk requires more examination. In the original design, it was intended that there be some separation between the reference desk and the other service points to allow for longer consultations with less distractions than the busy front desk allows. However, in the final design, a large cabinet physically disconnects the reference desk from the other service points making the entire desk less efficient than it could be. It should be possible to restructure the desk to provide a more open structure that will allow for more continuous communication between the service points at the desk.

Organization

The University Library will regularly reevaluate its organizational structure and each position within the staff. The traditional departmental structure no longer allows the library to adapt to the constantly changing information technology environment. While certain departments are required to maintain supervisory lines of control, many of the activities in these departments will increasingly be completed by teams made up of staff throughout the library. Teams will be formed and disbanded as needed.

The organizational structure will reflect the importance of service, instruction and supporting the educational mission. Positions may be reallocated or reassigned when needed to provide better service or better instructional support.

Interim University Librarian
John Tombarge

Operations Manager
Karin O'Callaghan

Public Services Librarian
John Tombarge

Head of Technical Services
Laura Turner

Telford Science Librarian
Mary Abdoney

Sr. Reference Librarian
Dick Grefe

Access Services Librarian
Eliz.Teaff

Humanities Librarian
Yolanda Merrill

Data & Statistical Services
Carol Karsch

Systems Librarian
Kwangsoo Han

Special Collections Librarian
Vaughan Stanley

Acquisitions

Cataloging

Serials

Supervisor
Cindy Morton

Supervisor
Laura Hewett

Emily Cook

Melissa Gualtieri

Karen Duff

Valerie Gaylard

Brandon Bucy

Tommy Sheedy

Edna Milliner

Seth Goodhart

Lisa McCown

Carol Blair

Wanda Swartz

Cricket Brittigan

Wendy Richards

Tony Murray

Organizational Goals and Objectives:
- Improve communications internally and externally
  - Hold regular library staff meetings
  - Enhance library newsletters
  - Effectively use blogs, Facebook, Twitter, RSS news feeds and other social technology to communicate with faculty, staff and students about new developments in the library.
- Devote organizational and financial resources to service and instruction
- Develop library staff to maintain needed technical and professional skills
  - Hire Electronic Resources Librarian
  - Build staff skills in digital resource management, database design, interface design, and systems integration
  - Redefine existing positions to adapt to changing technology and services
  - Devote funding for off-campus training and professional development for library support staff.
- Assessment
  Provide information for the Institutional Effectiveness Report (IEP). Use ALA and VIVA standards for Benchmarking, conduct user satisfaction surveys.

Organizational Recommendations for the New Library Director:
- Integrate library planning into the University's strategic planning process
- Establish a Library Advisory Board to evaluate and guide library planning, facilities and services. This board will be made up of experts in the field, such as library directors at regional peer schools and other knowledgeable individuals. Faculty and student should also be represented on this board.
- Work with the Dean of the College and the Provost to define faculty status for librarians in accordance with ACRL Faculty Status Standards and the W&L Faculty Handbook. Examine if separate promotion and tenure guidelines are needed. Determine how tenured librarians are to be evaluated under the process established in the Faculty Handbook.

Instruction and Outreach

A new emphasis will be placed on the educational mission of the library. The library will continue with its liaison-based model of providing discipline specific instruction, but it will also develop new instructional programs. Information literacy and library instruction are receiving more attention from accrediting agencies and the Department of Education. This attention has encouraged a reexamination of instructional efforts and the development of new methods to assess the library's instructional efforts.

Instructional and Outreach Goals and Objectives:
- Develop a virtual orientation to provide students with an introduction to the library and its services that will be continuously available in addition to the library's participation in the freshman orientation program.
- Introduce students to necessary basics about using the library and its services through a series of online instructional tutorials.
- Integrate library instruction and library resources into Sakai.
- Obtain a subscription to the LibGuides content management system and create a template for course and subject research guides. Begin migrating library course and subject guides to LibGuides. Assess the usability of the guides through student focus groups or usability tests.
- Investigate the ability of LibGuides to provide access to library databases and as a possible replacement for the current database of databases.
- Develop a series of library sponsored workshops and classes that can be offered outside the library to various groups (ex. fraternity/sorority houses and residence halls).
- Implement new methods to promote the library's digital services.
- Develop instructional presentations for the "Smart Zone" to teach the community about the library's digital services.
- Work with faculty to incorporate classroom instruction on the full range of library services, including research, quantitative analysis, multimedia projects and poster design.
- Organize instructional sessions to correspond with academic activities (e.g. SSA).
- Provide instruction and support for library related applications including bibliographic management software, LibX and other library specific applications.

- Together with ITS, provide instruction and support for equipment and technology available at the Information Desk. Enhance cross-training program between ITS and library employees.`
- Examine library circulation policies and adjust them based on how materials and equipment are actually used.
- Together with the Law Library and the General Counsel's Office, establish an instructional program for copyright, author rights and open access for faculty and staff.
- In cooperation with ITS, identify and acquire useful support technologies for current software (e.g. USB keyboard for GarageBand, microphones and mixing table for Final Cut, PASCO USB sensors for Datastudio for sciences, etc.)
- Use circulation statistics to evaluate selection of new technology purchases. Evaluate new/updated technology for library services (e.g. large scale printer, scanners, and microfilm).
- Enhance basic instruction and videos for technology for check-out.
- Investigate the possibility of library sponsored speakers and programs.
- Enhance collaboration with the Tucker Multimedia Center, ITS and academic departments.
- Increase staff levels facilitate the creation and implementation of classes aimed at professional development for University Staff (e.g. Basic HTML/XHTML, webpage creation and best practices, build your own website using Weebly, Google, or other free web creation and hosting options, using Publisher to create posters, bookmarks, or newsletters, Photoshop training).

Collections

Technical Services is responsible for the acquisition and preparation of library resources. This includes both physical and digital resources. This department has one vacant professional position, and one full-time staff position has recently been transferred to another department. Technical Services has been reorganized and responsibilities redistributed to the remaining staff. New emphasis has been placed on developing the Electronic Resource Management System, a module in the integrated library system (Innovative Interfaces). Better management of these resources should allow the library to provide improved access and support for electronic resources. When hired in the summer of 2011, the Electronic Resources Librarian will be devoted to managing, promoting and enhancing the usability of these resources.

Collections Goals and Objectives:
- Hire Electronic Resources Librarian
- Seek digital access over physical ownership of resources
- Secure licensing agreements that allow for ILL of digital resources
- Review and refine physical collections; eliminate items that are no longer relevant to these collections; develop a space plan for the collection
- Improve access to resources through enhanced bibliographic data and increased use of metadata in all library systems
- Measure usage of library resources and eliminate underutilized resources
- Identify needs for increased instruction and promotion for underutilized resources. .

- Initiate a needs assessment plan for the curriculum and the research agenda of the faculty
- Maintain and build relationships with library consortia to maximize the library's purchasing power

Digital Collections

Digital collections include items digitized locally for preservation and increased availability, as well as providing assistance with managing digital assets across campus, including the W&L Digital Repository and items made available through external archives, such as the Internet Archive. The University Library will actively engage the university community to build needed collections and assist in managing the university's digital assets.

Digital Collections Goals and Objectives:
- Expand the digital repository for faculty publications.
- Establish an oversight or advisory committee for campus digital collections that includes members from interested university departments. This committee will guide the prioritization and development of collections to be digitized or managed by the libraries.
- Establish working teams to conduct the day-to-day management of digital collections.
- Investigate the University Library's potential role in assisting with research data management and dissemination plans, such as those now required by the National Science Foundation and other funding agencies.

Library Systems

The overriding goal of the strategic plan for library systems is to simplify and improve search and discovery systems to allow easy access to all library resources. Achieving this goal will require extensive usability testing and developing staff skills in interface design, accessibility, and metadata. This will be accomplished through establishing new collaborations between the Systems Librarian, the new Electronic Resources Librarian, Law Library staff and ITS staff.

Library Systems Goals and Objectives:
- Develop a common look and feel in the design of all search and discovery interfaces, such as the library Web site, the catalog, and the interlibrary loan system
- Develop mobile applications for the catalog and library resources
- Investigate next generation discovery tools for cross-database or multi-resource searching
- Investigate content management systems to assist in developing the library Web site
- Develop expertise in digital asset management and provide leadership on campus for the preservation of digital assets
- Update interlibrary loan system (ILLiad) webpages, add patron APIs, input ERM licensing agreement information for ILL lending.
- Enhance technical collaboration with the Law Library and ITS
- Explore and implement methods and open-source standards to enhance data exchange between library services and resources
- Investigate the opportunity to merge the library Web site with the Law Library site and share backend systems rather than duplicating systems

Facilities & Space Planning

The library's core duty is to enhance, stimulate and support learning. Indeed, the University's Strategic Plan speaks of the desire to "give added attention to how we educate students outside the classroom" and makes repeated references to the importance of the "learning environment" – both formal and informal. Thus, we need to develop the physical space within the library facilities to enhance the learning and studying environment by providing quiet, well lit and comfortable spaces that are conveniently located near relevant services, such as research help, writing help and technology help.

Leyburn Library is over 30 years old, and Telford Science Library is 14 years old. The ground level of Leyburn was renovated in 2009, but the remaining floors need refurbishing. Nothing has been done in Telford to replace worn-out furniture or add additional study space. There are severe space limitations on the campus and the university administration is looking for ways to use all campus spaces more efficiently. The libraries must work within the planning process to ensure that student needs and collections needs, as well as administrative needs, are met through future renovation of Leyburn and Telford. The greatly increased usage of Leyburn's Main level, following the recent renovation, shows that quality study space is in high demand on campus. Both group and individual study space must be provided. To prepare for space-planning discussions, the library staff will work with students and faculty to experiment with the spaces in the libraries to determine the specific types of spaces that should be included in any renovation project.

While quality collections are essential in providing library services, certain collections that are duplicated in print and online should be identified to free space needed for other purposes. The initial collections to be considered include journals included in JSTOR, the Serial Set and congressional hearings.

Special Collections

Special Collections houses both the most valuable items in the library's collections and the historical archive of Washington and Lee University. Preservation of this material is an essential responsibility, but even in Special Collections, education is the library's primary mission. Enhancing access to materials in Special Collections is essential in fulfilling the library's educational mission.

To increase access and usage of Special Collections materials, the library will first enhance the depth of the staffing. Additional staff will be trained to provide service in Special Collections so that posted hours can be more reliably maintained. Ideally, the library will expand hours beyond the current 8:30 to 4:30, Monday to Friday hours.

To place a greater emphasis on teaching and learning, the library will seek funding to reorganize and renovate the Boatwright Room and Edgar A. Basse Study Area, which are the two rooms that make up Special Collections. Flexibility will be the essential aspect of this renovation, with the focus on creating instructional space as well as improved public research facilities. Staff processing and workspace will be separated from the public space. This

separation will help maintain the security of materials and provide a cleaner and quieter environment for visitors.

The Boatwright Room will become the new front door of Special Collections and will be refurbished as a formal reading room; however, this space will be designed so as to also provide a seminar style teaching space for classes and small presentations requiring the use of Special Collections materials. New lighting and window treatments will be added. Electrical outlets will be added for laptops and other devices now commonly used in research and instruction. Exhibit space will be renovated to allow flexibility in the design of new exhibits and make it easier to rotate exhibits more frequently.

The Edgar A. Basse Study Area will be renovated to provide a small area for individuals making extensive and extended use of the collection. This study area will be adjacent to the desk of the Senior Special Collections Assistant, who assists visitors in using materials from Special Collections. She will be centrally located to enable her to observe the activity within both the Boatwright Room and the Basse Study area. In the back of the Basse area, a staff work area will be created for processing materials, preparing exhibits and other activities that require staff to keep materials out for extended periods. This area will be separated from the public space with an acoustical barrier that will dampen the noise and hide the work area from public view.

While the renovations will improve the space, a new preservation plan will outline the steps to be taken to protect the vulnerable materials and facilitate access.   Audio and video recordings are held within the collection, and many of these items are currently stored on outdated media formats. Digitizing these items, following archival best practices, will ensure their usability in the future. In the process, the outdated formats can be removed from the collection and free shelf space (approximately 42 linear feet) that is desperately needed for other collections. Other items, such as the letters from Robert E. Lee, will be digitized to make them more accessible to scholars worldwide. Special Collections will work with the Digital Collections Advisory Committee to establish priorities and timelines to preserve these items.

Beyond digitizing outdated media items, additional measures must be implemented to address the shortage of space for the growing collection. A capital budget request has been submitted to install additional compact storage in the vault. The library will also work with ITS and others on campus to investigate the acquisition of a document management system that will allow the library to digitize or maintain born-digital items in the University Archives. The documents management system will allow permissions to be set so only authorized individuals have access to confidential items and will automatically enforce document retention policies. Additionally, a documents management system will enhance the collection by providing searching capability to expedite the discovery process.

Procedures and timelines will be established for each acquisition added to the collection that is not cataloged. Project management techniques will be employed on larger gifts to allow the progress of each acquisition to be monitored and evaluated.

Friends of the Library and Development

Currently, the Friends of the Library is the centerpiece of the Library's development efforts. The new library director will need to work with the Board of the Friends of the Library to define the future of this organization and identify specific goals this organization will address. The new director will also need to work actively with University Development to identify other external funding opportunities. In this interim period, the Friends of the Library will continue as it has in the past.

Friends of the Library Goals and Objectives:
- Improve recognition for gifts provided by the Friends and other benefactors
- Increase membership in the Friends of the Library
- Increase donations received by the Friends of the Library
- Develop new promotional materials for the Friends of the Library

Other Development Activities

- Work with Development to pursue grant funding to support the purchase of new technologies.