

K-State Libraries: A Living Strategic Plan, 2007-2012 Executive Summary, April 2008 – March 2009

From April 2008 – March 2009, the K-State Libraries engaged in numerous activities to facilitate implementation of the strategic plan. The work accomplished through five specific initiatives deserves highlighting for the substantial impact it had on realizing strategic goals and objectives: the Repository Services Team; the Library Systems Evaluation Task Force; the Service Model Working Group; the Collections Council; and the Workflow Analysis Group.

The **Repository Services Team (RST)** charge was:

Define the K-State Libraries' role in the creation, discovery, sharing and preservation of the University's unique digital academic and institutional knowledge assets.

RST focused their attention on two strategic areas:

- institutional repository: expanding the scope of K-REx by adding more collections and
- digitization: selecting pilot digitization projects to understand digitization workflow implications and technical systems requirements.

In their final report, RST identified lessons learned which included:

- maintaining Institutional Repositories (IR) is a time consuming activity
- recruiting content for IR is a challenging task and key for success in this area is working with subject liaisons
- increasing awareness of scholarly communication issues on our campus is needed
- scholarly communication, institutional repositories, publishing efforts and digital collections are all closely tied with each other and activities in these areas need to be well-coordinated

RST explored various models used by other academic libraries and developed a diagram illustrating the functional aspects of content selection, outreach/content recruitment, content creation, metadata development and support, and systems development and support in three strategic digital areas: Institutional Repository, Digitization, and Publishing. For each functional area, RST put forth staffing recommendations and noted all positions could be filled internally through reallocation of duties. The report in its entirety is available at:

http://docs.ksulib.org/index.php?title=Repository_Services_Team. RST's work has provided a strong framework for the Library Leadership Council to build upon as they continue to develop reorganization plans for the K-State Libraries and work to realize Goal Three of the Strategic Plan.

The **Library Systems Evaluation Task Force** charge was:

1. *Identify functional and system requirements for the K-State Libraries and vet them with the library administration and staff*

- 2. Evaluate available options, both proprietary and open source, against approved function and system requirements, and make recommendations to the library administration on the strengths and weaknesses of available options*

The task force produced two reports. The first presented findings gathered during focus groups and open forums with libraries staff and identified ten “high priority” features that either pose significant problems in the current Voyager system or are intrinsic to workflows:

- catalog interface
- reports
- staff interface
- tracking of items
- stable yet comprehensive and customizable system
- bulk record handling and global changes
- Unicode and diacritics
- ILS Support
- interactions with other systems
- financial data

The findings formed a basis for the recommendations put forward in the second report:

- plan a migration to an open source Integrated Library System (ILS) to be accomplished by 2011
- explore the viability of and requirements for improving the operability of Voyager and the OPAC as we transition to an open source ILS
- explore consortial opportunities
- continue to actively monitor the state of the ILS

The reports in their entirety are available at:

<http://ksulib.typepad.com/ilstf/2008/06/report-files-pa.html> and <http://ksulib.typepad.com/ilstf/2008/10/phase-2-report.html>. The recommendations put forth are under consideration as the K-State Libraries work towards realizing Objective 2.2 - we will simplify access to our services and our collections - and Objective 5.6. - we will build and sustain a secure, robust, expandable, and cost-effective information and technology infrastructure to support University access to essential collections and services.

The **Service Model Working Group** charge was:

Make recommendations for consolidating information and reference services in Hale Library to minimize the number of service points with the goal of creating a single point of contact for users.

The working group identified wayfinding, training, and the location of microforms as primary challenges to consider before making recommendations in a phased report.

Phase 1 recommendations included:

- closing service desks on the 1st and 3rd floor
- consolidating reference help on the 2nd floor

- setting expectations for staffing and service
- improving access to 3rd floor collections
- developing new patron help tools
- establishing help centers throughout Hale
- installing “cell repeaters” in Hale
- setting up a roving reference service
- developing new signage

Phase 2 recommendations focused on assessment, stressing its importance before future action is taken. The report also set forward recommendations for a timeline, staffing plan and implementation. The latter included formation teams for implementation, training team, training tools development, and statistics compilation, if needed. The recommendations in their entirety are available at: <http://ksulib.typepad.com/genref/2008/10/service-model-w.html>. The group’s main recommendation to close service desks and have a consolidated point of service has been acted upon to realize Objective 2.2. - we will simplify access to our services and our collections. The staffing model for the consolidated service point is in development. Progress is ongoing to meet the recommendations put forward to meet Objective 2.1 - we will enable users to interact with our services through emerging or user-familiar technologies - and Objective 2.3 - we will expand and advance online reference services.

The **Collections Council** was formed in Fall 2008 as a broad-reaching, permanent, representative group with authority and responsibility to make decisions regarding collections policies and issues in order to realize objectives set forth in Goal One of the Strategic Plan. Accomplishments during the time period of this report include:

- implementation of procedures for analysis of continuations usage
- determination of reduced FY10 monograph budget allocations to deal with state budget callbacks
- finalizing deselection policies regarding duplicate monograph copies
- reviewing recommendations and making selections for new database and serial purchases
- identifying infrequently used databases for cancellation
- reviewing and approving a recommendation to amend the gift policy
- identifying appropriate consortial purchases.

Communications between the Collections Council and subject librarians/selectors was ongoing through various channels including meeting with departmental representatives and chairs, publication of meeting minutes, and an open forum. Various council members also met with the University Library Committee to keep them apprised of issues such as open access, consortial savings, and participation in LOCKSS (Lots of Copies Keeps Stuff Safe). Minutes from Collections Council meetings are available for review at <http://ksulib.typepad.com/bulletin/collections/>.

Formal and informal discussions about a new organizational design for the K-State Libraries were ongoing during the time frame of this report including via the newly-

formed **Workflows Analysis Group**. This group identified four key components necessary to ensure responsiveness to user needs: assessment, product development/acquisitions, communication/education/integration, and feedback/evaluation. Accountability is an essential element of each component, as it ensures that the Libraries meet the needs and wants of its customers and users. The work of this group was compressed into a simple flow-chart which was presented to the senior administrative team and the Library Leadership Council. Once the decision was made to proceed with reorganization, the flow chart became a guiding principle for reorganization, as it served as a constant reminder that accountability and assessment must be requisite and ongoing to become a truly user-centered organization. The workflow/accountability chart is posted on the Libraries' Reorganization Information webpage: <http://www.lib.k-state.edu/intranet/info/reorg/index.html>.

In addition to the initiatives above, the daily work of the K-State Libraries evolved during this time frame to the point where thinking and acting strategically became routine. The attached Progress Report -- Summary of Selected Activities, April 2008 – March 2009, testifies to that and informally documents endeavors. While not a complete account of accomplishments and activities, it provides information about work completed within departments and by working groups, councils, and teams as submitted by representatives of those bodies. Thanks to those representatives for providing information and to everyone for thinking and working strategically.

Respectfully submitted by Jane Schillie, Associate Dean of Libraries