

University Libraries

Loyola University Chicago

Addendum to the 2014-2017 Library Strategic Plan

Introduction

The Strategic Plan Task Force was convened in November of 2017 and charged with developing an addendum to the Libraries' 2014-2017 Strategic Plan that would run through calendar year 2020, when the University's Plan 2020: Building a More Just, Humane, and Sustainable World sunsets. The task force started its work by polling library faculty and staff for examples of goals that might become a part of this interim plan, and in the intervening months the task force has synthesized these contributions into six high level goals. While not all suggestions could be incorporated into the new plan, the task force believes that these six goals are both broad enough to engage the entire library and narrow enough to be achievable by the end of CY 2020. The focus throughout is on improving the Libraries' physical, organizational, and operational infrastructure, and helping us prepare for the next round of university-wide strategic planning. These goals are not meant to comprise the entirety of the Libraries strategic activities during this period and we also anticipate that planning for the Libraries next strategic plan will commence while this addendum is in effect.

The task force also realized early on that a number of themes emerged in staff contributions and during our discussions that weren't so much stand-alone goals as they were values that should be present in all our goals, though they will manifest themselves in different ways depending upon the specific area of library practice. These are: equity, diversity, and inclusion.¹

¹ Rather than gloss these concepts, we refer you to the *ODLOS Glossary of Terms*, <http://www.ala.org/aboutala/odlos-glossary-terms>.

Based on these values, the pending priorities of the Libraries from previous plans², and the priorities identified by staff, the addendum proposes six major areas to which we will dedicate time and resources. For each area, we have identified the overarching goal and a series of objectives to accomplish that goal. These objectives are not meant to be exhaustive and others may be added as needed. Some objectives were developed outside of this strategic planning process and have already been initiated or completed; but they are included here because of their resonance with these goals.

² See the “Update on the Progress Made on the 2014-2017 Strategic Plan,” at the end of this document.

Goals and Objectives

- Goal 1: Organizational development. The Libraries will review and update policies, practices, and organizational structures effecting hiring, job responsibilities, professional development, and organizational culture to promote effectiveness, equity, transparency, shared responsibility, and accountability.
 - Objective 1.1: Examine the existing structure of library committees and recommend adjustments and improvements to reduce inequities in workloads and address redundancies in committee charges. Include mechanisms for assessment of both committee activities and any newly implemented committee structures. [Pilot structure implemented 1/2019]
 - Objective 1.2: Review and update, or create if necessary, written policies on library support for professional development for all library employees.
 - Objective 1.3: Review all open positions and recraft or revise job descriptions to reduce redundancies, better reflect contemporary library practices, and more closely align with university and library priorities. [Initiated in FY 2018]
 - Objective 1.4: Hire an Assessment Librarian to coordinate quantitative and qualitative assessment activities across the University Libraries and to support data-driven planning and decision-making and ensure organizational effectiveness. [Assessment Librarian started 12/2018]
- Goal 2: Research and information services. The Libraries will develop a plan for library information services. This plan will address staffing commitments, physical service points, and virtual services to better meet user needs.
 - Objective 2.1: Assess physical service points in Cudahy Library, Lewis Library, and the Information Commons, taking into consideration location, hours, area of responsibility, supervision, reporting structure, and training.
 - Objective 2.2: Evaluate current use of virtual help services (including virtual reference, research appointment requests, document delivery, and general library contact/information) to identify gaps in user expectations and library services.
- Goal 3: Engagement with campus and community. The Libraries will review and enhance our framework for research, learning, and engagement with campus and

community partners in ways that includes library faculty and staff at all levels and that connects users with the library's resources, services, spaces, and expertise.

- Objective 3.1: Review the operation of our liaison and collection development services for academic departments and programs, as well as the distribution of subject specialist and selector assignments, and recommend adjustments and improvements.
- Objective 3.2: Establish a parallel service to key campus partners and populations not already served through our academic liaison program. Manage these relationships where they already exist and create partnerships where none exist.
- Objective 3.3: Review library and information literacy instructional services, and establish cross-departmental solutions for the delivery of classes, programs, and instructional support.
- Objective 3.4: Strengthen our commitment to the civic dimension of university life by hiring a Civic Engagement Librarian and developing programming and services that support research, learning, and civil discourse on contemporary political and social issues. [Civic Engagement Librarian started 10/2018]
- Objective 3.5: Hire a Coordinator of Community Relations and Communication to manage the Libraries advancement and alumni relations efforts; oversee the work of library boards; plan annual public programming and related outreach; and manage communication and marketing to campus and external stakeholders. [Coordinator of Community Relations and Communication started 10/2018]
- Goal 4: Collection development and management. The Libraries will develop an overarching collection development and management plan, providing for the ongoing assessment of library collections in all formats, to ensure their continued relevance for Loyola's diverse user communities.
 - Objective 4.1: Develop a strategic weeding cycle for print and e-resources which will sustain the library collection in the future and prevent the need for emergency weeding projects.

- Objective 4.2: Create a comprehensive collection development policy which employs a variety of collection and access strategies to meet the information needs of users, including for emerging formats.
- Goal 5: Space plan. The Libraries will begin to develop a comprehensive plan for the future improvements to our public and staff spaces to guide the expenditure of capital and other funds and to inform fund-raising efforts.
 - Objective 5.1: Compile a “census” of all University Library public and staff spaces on the lakeside campuses, detailing square footage, current functions and services, available technologies, and other equipment, and noting opportunities for both incremental and more comprehensive improvements.
 - Objective 5.2: Initiate an ongoing assessment program for all library public and staff spaces, with a focus on deriving actionable intelligence that can guide future improvements.
- Goal 6: Digital materials and services: The Libraries will create a unified strategy for digital materials and digital scholarship, positioning us to take a lead on emerging scholarly and research practices, including preservation and promotion of unique local collections.
 - Objective 6.1: Assess current needs for platforms for digital resources and digital scholarship, particularly at the undergraduate level, and create a plan to meet these needs.
 - Objective 6.2: Hire a Metadata Technologies Librarian to coordinate metadata creation, cleanup, editing, enhancement and migration, mapping and transformation across library platforms to promote interoperability and discovery. [Metadata Technologies Librarian started 11/2018]

Implementation

For each goal, we recommend that the Leadership and Planning Team (LAPT) will establish one or more task forces comprised of members of LAPT and any other faculty and staff needed to provide the functional expertise required to accomplish the goal. In some cases, existing committees will take a lead on implementation. These task forces and committees will report back to LAPT on their progress at least quarterly.

Update on the Progress Made on the 2014-2017 Strategic Plan

The following is a review of accomplishments, pending priorities, and directional changes by the University Libraries throughout 2014-2017. Each section begins with one of the three goals detailed in the FY14-17 Strategic Plan, followed by a summation of activities that fulfilled that goal and recommendations for future planning.

Goal One:

THE UNIVERSITY LIBRARIES WILL INCREASE COMPREHENSIVE AND CONVENIENT ACCESS TO LOCAL AND WORLDWIDE SCHOLARLY INFORMATION FOR THE LOYOLA COMMUNITY. THE LIBRARIES WILL OPEN NEW PATHS FOR DISCOVERY AND DELIVERY OF SCHOLARLY MATERIAL IN ALL FORMATS AND FROM MANY SOURCES, INCLUDING OUR OWN PRINT AND ONLINE COLLECTIONS OF PUBLISHED SCHOLARSHIP, UNIQUE SPECIAL COLLECTIONS AND ARCHIVES, AND SCHOLARLY COLLECTIONS AVAILABLE THROUGH LIBRARY COOPERATIVES, OPEN REPOSITORIES, AND OTHER EXTERNAL COLLECTIONS.

2014-2017 Activity

The University Libraries have made great strides between FY14 and FY17 in improving access to information resources and establishing a mature scholarly communications program. The Libraries selected and implemented Ex Libris's Alma and Primo, which is cloud-based library services platform and discovery layer, which have streamlined staff workflows and improve patron access to the Libraries' collections. The Libraries have worked to increased access to collections previously not included in the catalog, such as the Women and Leadership Archives browsing and archival collections and the Loyola Special Collections rare book and archival collections, and the inclusion of digital collections in the integrated library catalog. The Libraries have increased collection depth through development of collections to support new programs including Arrupe College and Engineering.

Creating a strong collection for the future will require assessing current collections through institutional data and developing a strategic weeding cycle. Improving data and providing full access to resources will be facilitated by being more intentional in the use of analytics and implementing all the features of Alma and Primo. The Libraries remain committed to

open access and providing patrons with the materials they need in the formats that work for them. This can be done by keeping abreast of scholarly publishing trends to facilitate access, and continuing to promote open access as a tenet of social justice. The University Libraries should prioritize partnerships with other campus units to provide data management support for researchers, and ensure that the Libraries are supporting researchers throughout the scholarly cycle.

Goal Two:

THE UNIVERSITY LIBRARIES WILL PROVIDE THE LOYOLA COMMUNITY WITH AN OUTSTANDING USER EXPERIENCE. THE LIBRARIES WILL SUPPORT RESEARCH, STUDY, TEACHING, AND LEARNING WITH A WELCOMING AND COMFORTABLE ENVIRONMENT, PRACTICAL AND INNOVATIVE TOOLS AND TECHNOLOGY, IMPROVED SERVICES INFORMED BY ASSESSMENT AND USER PREFERENCE, AND A USER-CENTERED AND SKILLED STAFF.

2014-2017 Activity

Over the past three years, the University Libraries implemented a series of significant upgrades to both physical and virtual environments to provide an experience that meets user needs. Enhancements have been made to study spaces by creating quiet areas in the lower level of Cudahy and the swapping of floors at Lewis. The addition of electrical outlets and furniture upgrades and the reconfiguration of IC room 120 have made for a better user experience in the libraries. A complete renovation of the Loyola Special Collections was accomplished providing a better environment for research and class use in addition to a substantial upgrade for collection storage. The University Libraries' staff have created a more user-focused and collaborative culture, through the establishment of new reporting structures, communication systems, and documentation. The Libraries plan to continue the support for this new culture by building on the foundation with more formal support for assessment initiatives regarding UX.

Person-to-person services at the libraries have been enhanced through a variety of programs aimed at meeting users at the point of need. Librarian outreach, office delivery, and pop-up collections have expanded the library physical footprint on campus. Self-service options for users have been improved as well. These improvements include the browsable AV collection at Lewis, improved streaming service offerings and extended AV

loan times. Online self-service improvements include better online renewal options, video/other tutorials, and upgrades to the LibGuides and website.

The University Libraries are committed to providing the Loyola community with an outstanding user experience. They continue to pursue improvements to IC classrooms and other study spaces. These improvements will require significant financial resources and long-term planning. Additional efforts have been initiated to improve access to tools, technologies, and services. At the conclusion of FY16, equipment was purchased to establish a maker space in the Cudahy library, which will require more work to be made available for use. Several meetings have been initiated with other departments (Quinlan School of Business, SOC, IES, DMS, etc.) to better understand the technology available to students across campus for a unified approach to technology solutions.

Goal Three:

THE UNIVERSITY LIBRARIES WILL ENHANCE THE CONTENT AND QUALITY OF ITS INSTRUCTIONAL AND CULTURAL PROGRAMMING. LOYOLA'S COMMITMENT TO TRANSFORMATIVE EDUCATION WILL BE ENACTED THROUGH LIBRARY PARTNERSHIPS WITH FACULTY AND ACADEMIC DEPARTMENTS TO DELIVER LIBRARY INSTRUCTION THAT HELPS REACH EDUCATIONAL GOALS. THE LIBRARIES WILL FOSTER STUDENT SKILLS FOR SUCCESS IN THEIR ACADEMIC WORK, LIFELONG LEARNING, AND INFORMED PARTICIPATION IN SOCIETY. COMPREHENSIVE AND DIVERSE OUTREACH PROGRAMS WILL ENGAGE THE LOYOLA COMMUNITY AND LOYOLA'S FRIENDS AND NEIGHBORS.

2014-2017 Activity

The University Libraries has made significant progress in the development of programs to support transformative education. The Libraries continue to expand their support for student programs on campus, including Arrupe College, the Office of Student Transitions and Outreach, the Center for Tutoring and Academic Excellence, the Center for Experiential Learning, and student learning communities, and have implemented new assessment initiatives for the instruction in the Core Writing Seminar. Librarians have expanded the range of topics taught in classes and workshops to better address student needs, moving beyond teaching specific research tools to leading workshops on fundamental skills for student success, including reading and notetaking skills, avoiding plagiarism, and visualizing information. To help classroom instructors, the Libraries have improved resources such as

tutorials and instructional material which can be embedded in learning management systems, and provided additional opportunities for faculty and graduate assistant orientation. There has been substantial growth in the number of class visits, projects, and workshops hosted by the Loyola Archives & Special Collections and the Women and Leadership Archives.

The University Libraries have also expanded the cultural programs offered to the Loyola community and members of the public. Major initiatives in this area include the creation of the Focus on the Book series, a collaboration with the Newberry Library, the Edward Gorey exhibition in collaboration with the Loyola University Museum of Art, and the Women's History Month Committee, an interdepartmental group that supports cross-campus Women's History Month events. The Libraries host a number of recurring programs in collaboration with other units on campus and in the community, including events in collaboration with Arrupe College, the Friends of the Library Speaker Series, and programs in partnership with the History Department and Office of Student Diversity and Multicultural Affairs. Additionally, the Diversity Committee was established to work with a variety of campus partners to foster an inclusive environment and host cultural programs for the Loyola community.

Some elements of this goal need further progress, and should be considered for inclusion in a future strategic plan. The Libraries should continue efforts to enable students and faculty to connect with the Libraries through their course management environments, and should work to create a clearly defined assessment strategy for instruction and outreach. More work can be done to provide opportunities for adjunct faculty to learn about library resources and services. While substantial progress was made in the effort to create a collection of video recordings of the Libraries' outreach programs and speaker events, staffing and technology limitations have slowed further development. Plans for a student advisory group and ambassador program are already underway. While the systems department supplemented staffing for digital preservation projects by hiring a computer science graduate student, providing internship experiences for computer science students is not a priority for the future. The Libraries did not pursue the goal to provide online programs for Loyola parents and friends, as it was eclipsed by other priorities. In the place of online programming, the PR committee has expanded the Libraries' social media platforms and the

Libraries' blog, and sends monthly emails to a list of interested students, parents, faculty and staff.

Conclusion

Following this review of the 2014-2017 strategic plan, the strategic planning committee has identified key areas to prioritize moving forward. In some cases, the strategic goals from 2014-2017 have been achieved to the point that they are no longer strategic priorities, but operational in nature. While these goals will not be included in a future strategic plan, the University Libraries should continue to support these activities. For example, the Libraries encompass in its daily operations continuous usability testing, cultural programming for the Loyola community, and transformative education. It is now an inherent expectation that these activities continue to be supported by the Libraries.

There remain unaccomplished or in progress strategies from the plan which we intend to consider in the next plan. To achieve success the plan will need to carefully consider the scope of the idea and what resources might be necessary to accomplish it in light of evolving institutional priorities.

- Integrated strategy for born digital materials and robust digital services, including research data management, and a commitment to open access and open educational resources (goal 1).
- Developing a strategic weeding cycle (goal 1). This includes assessment of the collection with increased use of Alma Analytics and institutional data, strategic hiring, and allocating sufficient time and resources to project management.
- Work with other departments to coordinate access to appropriate technology for teaching, learning, and research to achieve a unified budget and technology strategy. (goal 2)
- Re-envision physical spaces, particularly classrooms, within the libraries to better suit flexible instructional needs and user comfort. (goal 2) This includes assessing the effectiveness of current spaces, creating a new unified plan, and long-range plan for renovations.

- Define some kind of metric or ROI measure for programming and engagement initiatives (goal 3). This could include strategies for program planning, reaching the intended audience (in-person and digitally), and assessment.
- Pursue efforts to improve integration with learning management systems. This includes content creation and strategy, instruction, and access to library resources (goal 3).
- Create a communication and outreach plan for adjunct faculty and instructors. This might include orientations, learning management systems, and targeted marketing of library resources and services. (goal 3)
- Continue plans to create a student advisory group (goal 3).

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