COPLEY LIBRARY

STRATEGIC PLAN
2016-2020

FINAL DRAFT

University
of San Diego
COPLEY LIBRARY

SEPTEMBER 2015

Copley Library Strategic Plan

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# Introduction to the Strategic Plan

Copley Library's strategic plan charts our course for the next five years. It includes strategic themes that will enhance the library's identity as a responsive, service-oriented, and future-focused university library. These themes seek to cultivate the library's integral role in facilitating successful research and scholarship, providing comprehensive access to materials and services, and engaging users inside and outside the library's walls in an expanding global information network. The themes are outlined with goals that offer each theme an ambitious and attainable plan.

Because a strategic plan is ineffectual without specific, measurable outcomes, each goal will include objectives that focus on implementation, communication, and assessment. Emphasis on measureable outcomes will ensure Copley moves forward while maintaining excellence in our ongoing work. The library will review the objectives at regular intervals to monitor and report on our strategic efforts.

Finally, vital to each of these goals are partnerships amongst ourselves and with the members of our academic community. The strategic plan will guide us as we work to advance the University of San Diego's mission and situate the library as a hub of academic inquiry.

Copley Library Strategic Themes

Through review of the University of San Diego's vision, mission and values, earnest and productive conversation within the library, and representation from our stakeholders, Copley Library identified five key themes for our 2016-2020 strategic direction: **research and scholarship, collections, community, environment,** and **technology.**
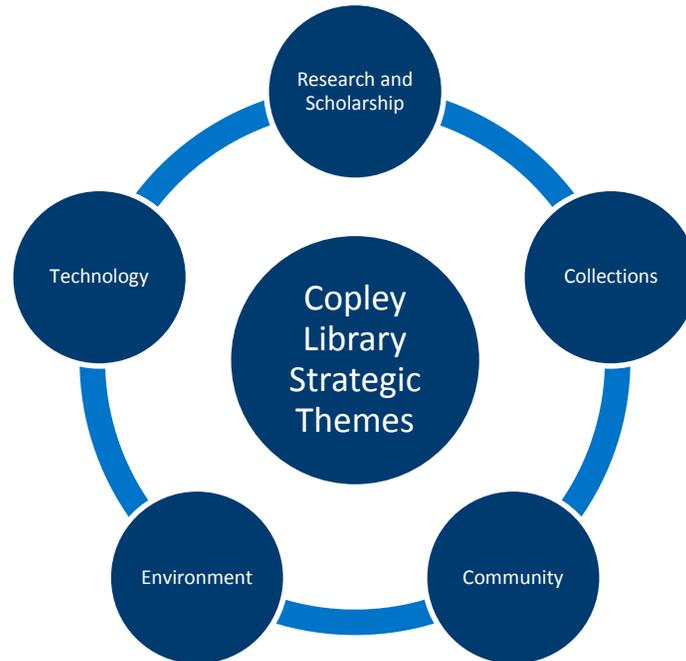
Copley Library Five-Year Strategic Plan

Research and Scholarship

Copley Library partners with every University of San Diego (USD) scholar through the learning, research, and scholarship cycle as each individual engages with information and creates new knowledge.

Goals

Promote and support scholarly communication across the university.
- Provide education on scholarly communication topics through informational resources (e.g., subject guides, print and email marketing materials) and outreach (e.g., department visits and individual consultations).
- Provide resources and expertise to help scholars retain their rights when publishing and disseminate research in a variety of venues and formats, both innovative and traditional.
- Partner with the Office of Sponsored Programs to assist principle investigators with compliance with funder mandates for open access and research data management.

Increase partnerships with faculty and centers.
- Collaborate with campus partners to offer targeted library workshops to special populations (e.g., Athletics Department, Student Support Services, Office of International Students and Scholars).
- Explore opportunities for targeted reference in academic centers, units, and student organizations and implement ideas as needs are identified.

Enhance library services for undergraduate and graduate research.
- Explore and implement innovative reference service models in order to serve all students in person and online.
- Publish theses and dissertations, undergraduate honors theses, and other student research outputs in Digital@USanDiego.

Expand and integrate library involvement, instruction, workshops, and expertise in information literacy into the core curriculum revision.
- Revise and develop engaging library courses to fulfill the requirement for the Undergraduate Core Curriculum (e.g., LIBR 103 revision).
- Coordinate and define all library instructional efforts (e.g., courses, workshops, information literacy).

Develop digital scholarship opportunities at the university, including digital humanities and a digital scholarship center.

- Use surveys, focus groups, and other information gathering tools to assess faculty and student needs for digital scholarship resources.
- Provide a series of workshops on digital scholarship and scholarly communication tools, resources, and topics.
- Develop the framework for and launch services of a digital scholarship center.

Collections

Copley Library embraces a hybrid environment of print, audiovisual, and online resources to serve as the university learning center that attracts, educates, and empowers all USD scholars as leaders in the 21st century.

Goals

Perform comprehensive collection analysis to offer focused collection planning to support academic excellence in all departments and programs.

- Continue to maintain and build print collections in the humanities and other disciplines requiring robust print book support.
- Update the collection management policy with a new section on weeding and develop a schedule to perform a space and weeding evaluation of print and non-book physical formats.
- Review print serials retention decisions for holdings accuracy and evaluate print/online journal overlap for Copley subscriptions and with the Legal Research Center to reduce duplication.
- Complete inventory of all general library collections, including the bound periodical section.
- Perform analysis of Special Collections to determine strengths and to pinpoint material that should be transferred from the stacks to Special Collections and from Special Collections to controlled shelving for regular circulation.
- Assess and address the future of USD scholar needs for e-books, e-journals, databases, streaming media, and Open Educational Resources (OER).

Capitalize on consortial partnerships (SCELC, Circuit, CRRA, CRL)* to augment the information resources available to USD scholars.

- Investigate possibilities of less restrictive licensing terms for online resources with vendors and consortial partners to allow for broader Interlibrary Loan (ILL) use, alumni and retired faculty use, and more customizable packages.
- Create subject guides for CRRA and CRL to emphasize their resources.

*SCELC – Statewide California Electronic Library Consortium; CRRA – Catholic Research Resources Alliance; CRL – Center for Research Libraries

Identify and secure a variety of options for growth of the library collection, such as endowments, donations, grants, and open access collections.

- Partner with University Relations to regularly highlight the library's funding priorities and opportunities with potential donors.
- Provide annual statistical reports with short summaries to university administration to demonstrate the need to increase library funding.
- Determine an internal reallocation formula for the materials budget to align spending with university priorities.

Increase the visibility, access, and role of University Archives and Special Collections.

- Develop a collection policy for Special Collections that emphasizes its collection goals and identity, such as a signature borderlands collection unique to San Diego and Southern California, and defines a budget for new purchases.
- Digitize University Archives and Special Collections materials in alignment with curricular, research, and community directives.
- Provide public digital access to University Archives and Special Collections materials through projects to digitize USD yearbooks and student newspapers as well as rare public domain material (e.g., the Book of Hours).
- Create indexed digital collections of archival material (e.g., early Board of Trustees minutes) for internal departmental access to expedite research transactions.
- Initiate collaborative projects to digitize material held by the department but whose copyright is held elsewhere (e.g., the San Diego Diocese newspaper *Southern Cross*).
- Build a landing page for University Archives and Special Collections on the library website to include request forms, digital exhibits, videos, and social media.
- Implement Encoded Archival Description (EAD) encoding of finding aids for archival material.
- Investigate development of a records management program so that appropriate USD material will systematically be sent to University Archives.
- Provide elevator access to the University Archives and Special Collections department.

Expand and promote USD scholar content in the institutional repository, Digital@USanDiego.

- Augment and diversify scholar content through targeted outreach (e.g., department visits, individual consultations) with faculty, grant principal investigators, department heads, new faculty, journal editors, conferences hosts, and others.
- Perform original cataloging using individual or collection-level records in OCLC for material added to the institutional repository.

Experiment with library publishing through Digital@USanDiego.

- Discover and meet with peer-reviewed journal editors, publishers of university content, and others to demonstrate publication capabilities of Digital@USanDiego

- Develop small suite of publishing services (e.g., copyediting, layout design) to augment Digital@USanDiego as a publishing platform.

Community

Copley Library offers USD faculty, students, staff and alumni as well as the wider community a welcoming and collaborative base for intellectual, social, and cultural opportunities and partnerships.

Goals

Envision a library that has the capacity to serve as the center of the academic community.
- Build campus support for a renovation or addition to the library that contains adequate meeting spaces, classroom space, group and individual study space, and an auditorium for campus and community events.
- Work with campus administration to determine if a renovation or a building addition to the library would offer the best solution to capacity and programming issues with existing building.
- Provide adequate and consistent climate control in all physical areas of the library building to ensure longevity of the collections and comfort for user activities.
- Explore offsite storage or compact shelving options as a solution for space issues in the library.

Promote the library as a place for the USD community to explore intellectual pursuits, school spirit, and Catholic identity through opportunities like the Golden Toreros and Research Week events in the library.
- Partner with USD University Ministry in two service events each year to participate as a service and teambuilding effort from the library faculty and staff.
- Invite Golden Torero alumni to contribute to University Archives historical projects.
- Host at least one Research Week event in the library.

Encourage and expand community partnerships and involvement.
- Offer an annual "human library" day and invite USD community members, local community members, alumni, and USD Board members to participate as "human books" that can be "checked out" for conversation with other members of the USD community.
- Host at least one *One Book, One San Diego* author or book theme event on campus during the programming season.
- Arrange regular community volunteer opportunities for library employees.

Expand the event and exhibit capacity of the library to offer more events and exhibits relevant to campus activities and interests.
- Investigate a gallery space for physical exhibits in the library and use Digital@USanDiego and library website to create timely digital components of exhibits.

- Use the digital sign to advertise events and information (e.g., workshops, library hours).

Develop formal annual fundraising, marketing, and outreach plans and encourage informal library marketing and development opportunities.
- Offer an annual signature library event each fall semester to attract all USD faculty and staff and promote library services and resources.
- Create and implement an outreach plan that defines and incorporates library support for USD academic and administrative units as well as for the local community.
- Integrate social media into formal marketing and planning efforts.
- Pilot a project to hire a student worker or create an intern position to assist with marketing, outreach, and development.

Explore and strengthen communication tools used to provide library information within and beyond the library.
- Set up a shared supervisor calendar for important student worker dates (e.g., federal work-study deadlines).
- Pilot peer and tiered reference service models using work-study students.
- Develop and deploy an accessible online platform to gather, analyze, and respond to patron feedback.
- Improve library interdepartmental communication and organizational knowledge through monthly news briefs from each department.
- Provide updates and news on scholarly communication, information literacy, and other developments in the library profession at library faculty meetings to encourage library faculty to talk with their faculty about these issues.
- Explore creation of a communication process for the USD community in times of disaster or disruption using social media and online presence, as well as a COOP (Continuous Operations) plan in Copley Library.

Environment

Copley Library provides a dynamic and thriving physical and virtual environment that contributes to our scholars' successes and supports the professional growth and development of the library's faculty and staff.

Goals

Advocate for renovation or addition to the current library building to provide better library opportunities that encourage academic success.
- Identify 21st century library building needs, such as seating capacity, studying habits, etc.
- Regularly review and summarize scholar trends in standard library and higher education literature for review by the campus administration.

Leverage and repurpose physical space to foster a center of learning and scholarship.

- Continue 24x7 library access during finals and enhance library programming for students' stress reduction.
- Renovate the library classroom to become a model of cutting edge technology for use in teaching workshops and library instruction.
- Review Copley's pre-shelving area for best use (e.g., as a study area, as a lab).
- Expand University Archives space so that all archival and special collections material can be located together and the Rare Book Room can be re-purposed.
- Create a standing committee to suggest improvements and advocate for the maintenance of the Mother Hill Reading Room as a USD icon.

Improve communication about library resources with all USD scholars.

- Review and improve directional and other signage about library resources and services throughout Copley Library.
- Create dedicated exhibit space to promote new library services as well as current library outreach efforts and encourage each library department to contribute exhibits.
- Recognize faculty who have contributed to Digital@USanDiego through emails and social media posts.

Assess ability to serve the research and scholarly output needs of all USD scholars in person and online.

- Identify and obtain infrastructure and professional support required - to expand and improve on current resources that support the growth of online coursework and degrees at USD.
- Work more closely with USD Disability Services to establish a process for expanding access to and integration of assistive technologies into current resources and services.

Promote a culture of recognition, collegiality, and professionalism to scholars and amongst library staff.

- Emphasize the role of merit performance for library faculty and staff in determining salary increases.
- Implement and promote a competitive library work-study student scholarship to be presented annually in the spring at a student worker recognition event.
- Establish a mentoring program for library student workers to encourage their academic and career success.

Identify new positions to achieve adequate library staffing levels to support the range of library services and to align Copley Library with peer institutions.

- Request two new critical needs positions annually.
- Regularly review and summarize peer staffing levels for review by the campus administration.

Identify library training needs to optimize service to all academic departments.
- Provide more in-house and external opportunities for relevant training for librarians.
- Survey and document library faculty and staff skillsets in order to align them with technology offered in the library and provide necessary training.
- Provide convenient internal access to documentation on Copley Library's fire, safety, and disaster resources and expectations.
- Formalize and communicate student worker hiring and orientation procedures and add safety training to the procedures.
- Develop a flexible online training program for student employees for training in departmental policies, processes, and procedures, as well as exposure to the library's mission and core values.

Technology

Copley Library delivers optimal online access and technology resources for the USD community.

Goals

Improve the library's online infrastructures and technology resources and create more streamlined and scholar-friendly interfaces to best support scholarly research and output.
- Establish policies and procedures to facilitate annual review of departmental technology needs and communicate those needs to library administrators and ITS.
- Form an ad-hoc committee to review latest technologies (e.g., 3D printers, Occam's Reader), trial potential resources, and make recommendations for implementation.
- Perform quarterly review of website and update site to ensure current, accurate, and user-centered content.
- Explore strategic options to digitally preserve and archive the university's website.

Partner with Information Technology Services to provide more technical help for scholars within the library.
- Collect a sample of requests for a week during the semester for technology help at the Access Services and Reference desks.
- Initiate conversation with ITS on offering basic HelpDesk services within the library.

Develop and maintain online training tools for using library resources.
- Establish an ad hoc library-wide committee to review existing quality online library videos and library tutorials to promote and/or make suggestions for purchase of software, licensing, and equipment needed to produce quality inhouse video tutorials.
- Review currency and statistics of all online tutorials annually, removing outdated tutorials, and updating tutorials as needed.

University of San Diego – Vision, Mission, and Values

<u>Vision</u>

The University of San Diego is a nationally preeminent Catholic university known for educating students who are globally competent, ethical leaders working and serving in our complex and changing world.   *Approved by the Board of Trustees on April 30, 2004.*

<u>Mission</u>

The University of San Diego is a Roman Catholic institution committed to advancing academic excellence, expanding liberal and professional knowledge, creating a diverse and inclusive community, and preparing leaders dedicated to ethical conduct and compassionate service. *Approved by the Board of Trustees on February 22, 2004.*

<u>Core Values</u>

The University of San Diego expresses its Catholic identity by witnessing and probing the Christian message as proclaimed by the Roman Catholic Church. The university promotes the intellectual exploration of religious faith, recruits persons and develops programs supporting the university's mission, and cultivates an active faith community. It is committed to the dignity and fullest development of the whole person. The Catholic tradition of the university provides the foundation upon which the core values listed below support the mission.

- <u>Academic Excellence</u>
  The University pursues academic excellence in its teaching, learning and research to serve the local, national and international communities. The University possesses that institutional autonomy and integrity necessary to uphold the highest standards of intellectual inquiry and academic freedom.
- <u>Knowledge</u>
  The University advances intellectual development; promotes democratic and global citizenship; cultivates an appreciation for beauty, goodness, and truth; and provides opportunities for the physical, spiritual, emotional, social, and cultural development of students. The University provides professional education grounded in these foundations of liberal learning while preparing students to understand complex issues and express informed opinions with courage and conviction.

- Community

  The University is committed to creating a welcoming, inclusive and collaborative community accentuated by a spirit of freedom and charity, and marked by protection of the rights and dignity of the individual. The University values students, faculty and staff from different backgrounds and faith traditions and is committed to creating an atmosphere of trust, safety and respect in a community characterized by a rich diversity of people and ideas.

- Ethical Conduct

  The University provides a values-based education that informs the development of ethical judgment and behavior. The University seeks to develop ethical and responsible leaders committed to the common good who are empowered to engage a diverse and changing world.

- Compassionate Service

  The University embraces the Catholic moral and social tradition by its commitment to serve with compassion, to foster peace and to work for justice. The University regards peace as inseparable from justice and advances education, scholarship and service to fashion a more humane world.

  Approved by the Board of Trustees on February 22, 2004.

Copley Library – Vision, Mission, and Values

<u>Vision</u>

We are a nationally preeminent Catholic university library advancing knowledge creation in a global environment.

<u>Mission</u>

Academic freedom, open inquiry, and the core values of the university guide Copley Library, an innovative leader in information access and application. As the university library, we advance teaching, research, and scholarship. In doing so, we are committed to the success and support of our intellectual community.

<u>Core Values</u>

We are committed to:

- Providing outstanding library service to our campus community

- Supporting research, teaching, and learning with our collections and services

- Upholding high standards of intellectual freedom for the exploration of diverse perspectives and ideas

- Fostering an environment of open communication, teamwork, professionalism, and respect amongst our users and library personnel

- Adapting to the changing needs of our users utilizing innovative ideas, technologies, and services

University of San Diego

The University of San Diego (USD), a Roman Catholic institution founded in 1949, is a young and growing university. USD President Mary Lyons announced that her retirement after the 2014-15 academic year. Her successor, James T. Harris III, began as USD President in August 2015. Currently, the university has an interim Provost, Andrew Allen, in the position until 2017.

USD received significant funding from the Shiley family for a new School of Engineering with an undergraduate focus. The university also recently launched online graduate education programs. At the same time, the university is reviewing eventual expansion of the overall <u>enrolled</u> student population (undergraduate, graduate, law and paralegal students) from 8,300 to 10,000. In addition, the Class of 2018 will be the first class to participate in a new mandatory freshman- and sophomore-year residency requirement.

The university was last accredited by WASC in July of 2012. That process led to recommendations including a Core Curriculum revision, which is in the final stages of development. The next comprehensive review is tentatively scheduled for 2021, with an interim report due in 2016. Information Literacy is one of WASC's "BIG 5" goals/mandates, and the library will be working with other departments on campus to implement a full information literacy program and assessment.

USD is currently updating their campus Master Plan, last updated in 1996. Key questions posed by the Office of Facilities Services and Planning included classroom space needs, classroom improvements, and recreational space improvements. Throughout the 2014-15 academic year, Dean Byrd participated in discussions about the Master Plan Update.

University of San Diego Trends

- Student Learning and Outcomes
- Ashoka Changemaker Campus
- Living-Learning Communities
- Core Curriculum Redesign
- Campus Master Plan Update
- Global Presence
- Catholic Identity
- Community Relationships
- Environmental Sustainability

Higher Education

The higher education landscape has been transformed by economic, technological, curricular, and accountability issues. As universities compete for full-tuition paying students and a diversity of the student body, they simultaneously must provide up-to-date physical and online infrastructure and

exceptional auxiliary services for their student population. The public scrutiny of higher education in terms of the return on investment has reached an all-time high while expectations for faculty include more collaboration, increased output of research, and adaptation to new models of the classroom and curriculum.

Higher Education Trends (from Educause – NMC Horizon Report: 2014 Higher Education Edition)

- Competency-based learning
- Exponential growth in online and hybrid learning/course/degree opportunities
- Increasing importance of diversity
- Greater assessment and accountability for information literacy
- Constant review of the adoption / use of technology in the curriculum
- Need to provide resources that are device-independent
- Ubiquity of social media
- Student as content creator rather than content consumer

Academic Libraries

Academic libraries must prove their value. As higher education is continually scrutinized for its costs and the value of a degree, it is essential that libraries communicate and prove the difference they make in student success and learning. Assessment is critical to this process. This trend will impact libraries and higher education more than any other trend.

Technology will continue to be a trend as more students use smart phones and tablets. The library website and online resources will need to be flexible to meet the needs of mobile users since more than 50% of all internet searches will be from mobile devices (PEW Internet 2013).

Academic Library Trends (from ACRL's Top Trends 2014):

- Assessment of Student Success
- Mobile Environments /Device Neutral
- Scholarly Communication
- Open Access (Journals, eBooks, data)
- Data Management and Preservation
- Patron Drive Acquisitions
- Shared Print Initiatives
- Re-purposing Physical Library Space
- Providing Virtual Library Space
- Digital Humanities

Copley Library Trends

Copley Library offers numerous benefits to the university community. As the busiest building on campus, the library is a key component of the academic enterprise of the university. Through

dedicated and talented library faculty and staff, we provide a breadth of service-oriented and student-centered resources for our users. The library also pools our expertise and resources through widespread collaboration, ongoing instructional opportunities, committee activities, and consortial partnerships to support our users.

Copley Library faces several challenges in our role as university library. The library recognizes that we lack adequate facilities, space, and staffing, as well as flexible funding provided by endowments. The impact of global events such as escalating costs of information resources and the possibility of economic downturn are ongoing considerations for the library. The library also regularly encounters technological issues and user misconceptions about availability and access to online resources.

Notwithstanding our current resources, activities, opportunities, and challenges, we believe that all academic libraries must demonstrate enduring value. The strategic planning process gives us an important tool for doing so collectively and comprehensively.

- Access Services
  - providing new services: Express Books, Get it Now, Rapid ILL
  - transition to Atlas systems ARES for eReserves
  - completing print collection inventory
  - increasing circulation of non-traditional library materials (laptops, chargers, etc.)
  - decrease in student worker hours due to increased minimum wage and budget cuts
- Technical Services
  - launch of Patron Drive Acquisition with ebooks from Ebrary
  - review of print/electronic journal overlap and removal of duplicates
  - changing of cataloging to RDA
  - projects such as cataloging the collection from USD's Hoehn Print Collection and partnering with the Franciscan School of Theology to catalog and incorporate its collection into USD's online catalog
  - review of funding for streaming media
- Reference/Instruction
  - creating more ways for students to connect with the library through the use of text message reference, chat message, and LibAnswers
  - pilot project embedding librarians into undergraduate courses
  - workshop program
- Archives/Institutional Repository
  - providing online access to resources in Archives and Special Collections
  - promoting more class visits
  - changing physical layout of Archives
  - cultivation of volunteer activities
  - launch of institutional repository (IR)
  - use of the IR as a publishing platform
  - hosting an annual one-day symposium on Digital Initiatives
- Website/ Online Presence
  - library website due to be updated and revised in 2015
  - move towards device neutral resources
  - updated policies

This plan was developed with feedback from USD Stakeholders and through the efforts of the following Copley Library committees:

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