

## Dalhousie Libraries Strategic Plan 2004 – 2008

### Budget Requirements

The Dalhousie Libraries Strategic Plan 2004 - 2008, following upon the “President’s Strategic Focus,” proposes four major strategic directions:

1. **Connect with Faculty and Students:** to ensure that the Dalhousie University community always sees us as the starting point for meeting its information needs.
2. **Optimize Access and Collection Development:** to be the information gateway for the Dalhousie University community
3. **Create Effective Learning Environments:** to prepare students for an information intensive and increasingly collaborative world.
4. **Partner in the Learning Enterprise:** to improve Faculties’ research and teaching effectiveness and student learning outcomes.

Through implementation of this plan the Dalhousie libraries seek to respond to the changes in the manner in which knowledge is distributed and managed; the need for new learning environments to address expectations created by the possibilities of new technologies that enhance collaboration; and the need to provide more expert information support to faculty and students engaged in teaching, learning and research. The focus is therefore upon the library as a proactive partner in learning and research and as a place that reflects the values and forward thinking of an institution educating individuals for work and a life of continuous learning in the 21<sup>st</sup> century.

The following presents a summary overview of main areas within the libraries requiring additional funding over the next few years in support of their strategic directions. A detailed breakdown of funds requested to support specific actions planned for 2004 – 2008 is attached as an appendix.

### **Strategic Direction 1: Connect with Faculty and Students**

#### *Surveys*

Understanding the information needs of faculty and students is indispensable in sustaining a library system that can provide the services and resources that will most effectively and efficiently further learning and research. The libraries will strive to respond to subtle differences among disciplines and departments and encourage more targeted services and resources. To accomplish this they must know their clientele and exhibit the flexibility and openness to meet changes in faculty and student needs.

The next few years will see an increasing number of new faculty on campus with different research interests and different program initiatives within the institution itself. The libraries will have structures in place to ensure that the needs these changes create are acknowledged and acted upon.

### *Marketing of Library Services and Resources*

While mechanisms and surveys will be instituted to ensure that the information needs of faculty and students are understood, the libraries will also increase their marketing efforts to make faculty and students aware of what the libraries have to offer in terms of their expertise, services and resources. In the past few years it has been amply demonstrated that the community could benefit significantly from simply knowing what resources and services are available to them through the libraries. The best ways to accomplish this will require funds to implement a good marketing strategy. A simple “Communications Plan” devised by students in the Faculty of Management a few years ago to make the community more aware of the libraries’ resources, recommended the expenditure of \$20,000 / yr.

### *Improving Collection Use and Access*

The libraries must connect with students and faculty in a variety of ways. Besides marketing their expertise and resources to them as well as ensuring their needs are well understood, the libraries will through training (information literacy, skills training, internal staff training, etc.) and through a continuously improving web presence, make collections and services more directly accessible to the users. \$50,000 / yr. should be expended to continuously improve information skills among staff and the community and to improve navigation within the libraries’ various computer interfaces, both existing and contemplated. Another \$90,000 over four years is required for the purchase of content management software to integrate and manage the many diverse sources from which the libraries supply their journal and database content.

## **Strategic Direction 2: Optimize Access and Collection Development**

Recently, as a process in the libraries’ strategic thinking, the problem of collections and access was addressed in, “A Long-term Sustainable Plan for Dalhousie Library Collections, 2004-2008,” submitted as an initial response to BAC XXVIII. This report should be consulted as a reference to detailed collections needs and costs.

It is patently obvious that a library without collections, or equally important in today’s context, access to collections, is of extremely limited value to its community. The collections and convenient access to scholarly resources everywhere are the basis upon which all other services are delivered and are critical factors in the university’s competition for the best students and faculty. It is therefore incumbent upon the university to give this strategic direction the most serious consideration among all others as a necessary though not sufficient condition for sustaining an adequate library system.

### *New Novanet Library Management System*

While the report on library collections addressed specific collection needs it said nothing about the need to implement new software to more effectively manage and distribute both print and digital resources nor about the initiatives necessary for the libraries to deal with the proper preservation or stewardship of those resources. The strategic plan, in cooperation with Novanet, the Nova Scotia academic library consortium, therefore, calls for a replacement of the existing unsupported library management system (Geac Advance) and in collaboration with CAUL (the Council of Atlantic University Libraries) for the creation of an Atlantic region scholarly portal. The cost to Novanet of such a replacement and implementation would be about \$1,2 million with the Dalhousie libraries responsible for a little less than half the total cost. The libraries will also pursue the development of software and collections to support the “Library on a laptop” initiative to ensure through the effective use of technology and online resources that services and collections are available where students and faculty work. The “Library on a laptop” is both a real and symbolic initiative embodying most of the libraries’ ambitions for service to the university community in the next 4 or 5 years. Internal development costs for this project would be about \$50,000 / yr. to cover the costs of hiring another programmer.

### *Stewardship*

Academic libraries are the primary source of scholarly information and as such have always assumed an important stewardship and preservation role. The Dalhousie libraries are becoming older and as a result have reached their capacity with respect to space for physical holdings. New space must be found both internally and in collaboration with CAUL (the Council of Atlantic University Libraries) to decant some of the collections to create urgently needed study spaces while maintaining relatively convenient access. Compact shelving should be purchased and space found to house some of the collections which because of heavy use must be maintained locally. \$400,000 in compact shelving would meet the libraries’ requirements plus the costs of renovating a space(s). An additional \$25,000 / yr. is required to house less used collections off site hopefully as part of a regional collaborative initiative in a commercial facility such as Iron Mountain with whom ISI has recently negotiated a storage contract for the Atlantic universities.

### *Reorganizing Collections*

Another initiative in this strategic direction is the proper organization of the existing print collections in the Killam. Years ago, when the science collections in the MacDonald Building were moved into the Killam they were moved as a block to the most convenient space available. The particular filing of those collections placed them out of normal call number sequence causing unnecessary confusion for staff and users alike. As part of a process of reconsidering space allocation within the Killam, the collections, after consultation, will be reorganized in proper call number sequence

thereby saving both significant staff and user time. A reorganization of the collections could be accomplished over two years with student help. The overall cost for student labor would be about \$200,000.

### *Institutional Repository*

In support of collection development and access the libraries, in collaboration with other academic libraries across the country, will create a local digital repository for materials produced at Dalhousie and as a means of promoting an open access model. This is estimated to cost approximately \$20,000 for yearly maintenance support and is a necessary first step in collaboratively beginning to deal with the difficult problem of the long term preservation of digital materials.

The overall emphasis in the second strategic direction is to obtain the widest and most efficient access to collections possible at a sustainable cost in terms of staffing and resources.

### **Strategic Direction 3: Create Effective Learning Environments**

In many respects this strategic direction might at first appear to be outside the libraries' mandate. However, libraries, besides serving as repositories, have always been preeminent public learning spaces.

#### *Expand the Commons in all Libraries*

The opening of the Learning Commons in the libraries in 2002-2003 clearly demonstrated the success and need for new learning - library spaces enabled and demanded by new methods of handling and distributing scholarly resources. Pen and paper have been replaced by word processors; single copies of journals and microform texts by digital publications available to the whole community simultaneously anywhere and at any time; class assignments and course outlines have been augmented by virtual classrooms and email. The transition, initially slow and tentative is now gaining momentum. Some space within the libraries should be reconsidered and reconfigured to take full advantage of the flexibility and new learning environments demanded by students. Based on current demand, the Commons need to be expanded. Ideally, new spaces can and should be built to meet the combined objectives of the libraries, Student Services, the Centre for Learning and Teaching, the Committee on Enrolment Management, etc., which are all aimed at creating better learning environments and student learning experiences to meet legitimate expectations.

#### *Revitalize Existing Library Spaces*

The libraries should be physically revitalized as places for study and research in an atmosphere conducive to scholarship and scholarly collaboration. The primary objective of creating effective learning environments with the libraries as core is to

leverage the obvious assets of the library environments to enhance students' opportunities for learning and the learning experience as well as to provide faculty with an alternative research and collaborative space. There is an opportunity within this context, for example, to create a GIS Centre to support the needs of students and researchers in a variety of faculties in their use of GIS tools and resources which would be difficult to accomplish in a specific Faculty.

Curricula have changed and will change to incorporate new possibilities for teaching and learning. Central to the success of evolving curricula are readily accessible information resources and interactive spaces. Through research and consultations about new teaching and learning needs and methods, the libraries hope to provide appropriate learning spaces to accommodate students and faculty alike. Certainly the "library as place" in the modern context needs to be revisited and explored for the benefits it can bring to the community and the other services and facilities which support it.

A recent study on student study spaces has shown that the libraries remain among the most favoured study and learning spaces on campus despite many deficiencies. It will be the libraries' objective in collaboration with, hopefully, Student Services, among others, to address these deficiencies and to produce spaces which enhance the libraries' role as independent / collaborative learning spaces and enriched scholarly environments embodying the best of what the university has to offer.

It is difficult to set a budget for this initiative but certainly monies should be provided to begin to refurbish some of the existing spaces. \$100,000 / yr. would not be unreasonable to perform some cosmetic work and begin to plan conceptually and architecturally for enhancements to the facilities. Funding for major enhancements involving the creation of new spaces, once formalized, should be sought as part of future capital campaigns.

#### *Continuously Improve Software to Enhance the Overall Learning Environment*

Accompanying the need for new learning spaces is the need to implement and develop new technologies which encourage learning which is independent of formal laboratory and classroom settings. To support these independent learning environments, virtual and real, the library will need appropriate software as well as a staff of liaison librarians who support outreach initiatives.

### **Strategic Direction 4: Partner in the Learning Enterprise**

#### *Providing More On-Site Services and Resources*

In this plan the notion of the libraries and librarians as active partners in the educational mission of the university is paramount. This requires that many librarians will operate more directly within faculties and departments while having a "home base" in the libraries. The library pilot project within Computer Science has proven to be an

extremely successful model. Emphasis will be placed upon a greater integration of information and liaison services delivered on site and supported by library systems and technical services facilities. Augmenting the staff of professional librarians to enable more liaison and teaching activities would be desirable in a projected learning environment where more independent learning is encouraged.

#### *Special Attention to Address the Needs of Graduate Students*

While liaising more closely and actively with all faculty there is a greater opportunity to partner more effectively with them in the education of graduate students. Librarians will provide the sophisticated tools and knowledge management expertise to help graduate students more effectively with their theses and research projects.

#### *Seek Partnering Opportunities to Improve Library Impact*

The libraries will actively seek partnerships with faculties as well as other units that provide academic support such as UCIS and the Centre for Learning and Teaching to collaboratively improve academic services provided to students and faculty. As they already do, librarians will increase the discipline specific electronic help aids they provide and, through partnership with faculty, develop materials to support learning at a distance and new courses which are designed to be delivered in a time and place to meet the students' needs.

### **Archives**

The needs of the Archives and its growing importance as part of the scholarly information fabric are often overlooked. The Archives has never received a proper operating budget to effectively conduct its daily operations.

The University Archivist has included a statement and explanation of needs for consideration by the Budget Advisory Committee. It is recommended at least \$60,000 / yr. be allocated to the Archives in order to establish a proper operating fund.

No mention is made in this document of costs which would be assumed if the Archives were to become more heavily involved in the records management of the institution. Documents exploring those costs exist if the BAC wishes to review them and to begin to seriously address the University's records management situation.