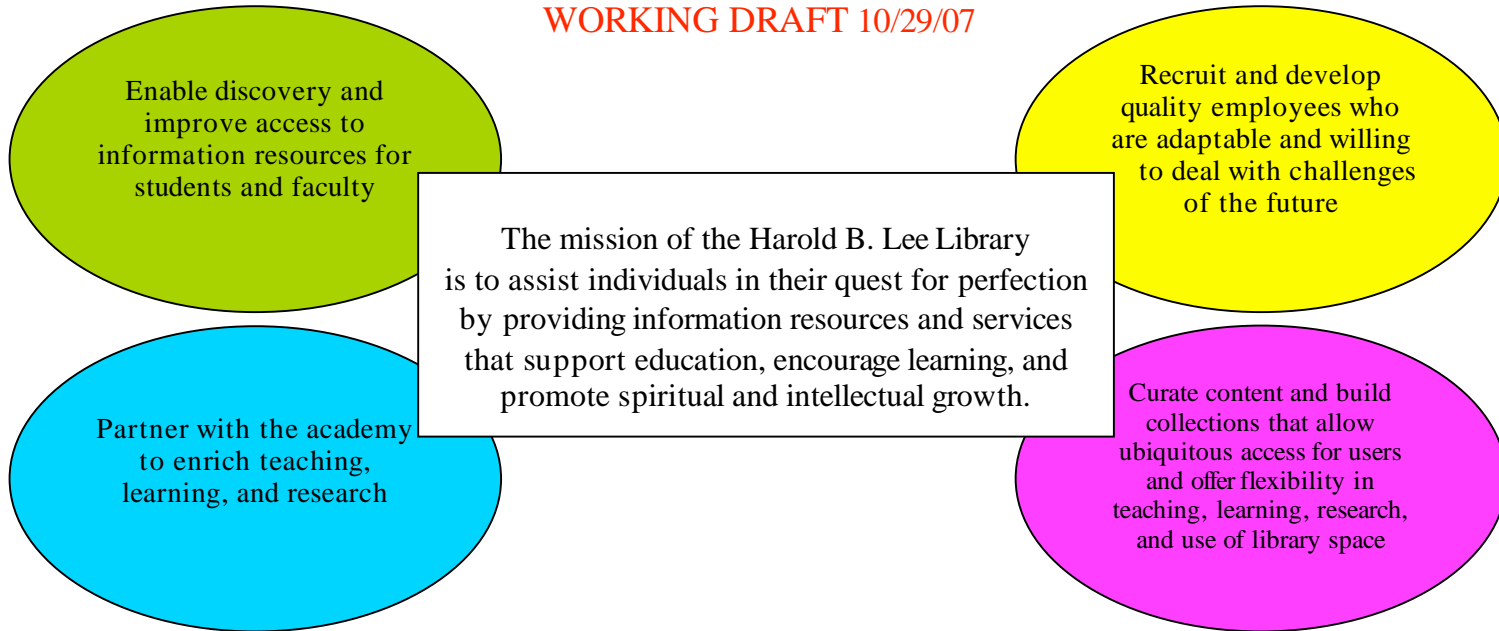


**STRATEGIC DIRECTIONS with 2007/08 Operational Objectives**

**WORKING DRAFT 10/29/07**



GOAL	OPERATIONAL OBJECTIVE	Measures of success	Sponsor/ Key Support	By when?	New Resources required (repurposed)	Progress / Status August 8,2007
<b>STRATEGY #1:</b>						
<b>Enable discovery and improve access to information resources for students and faculty</b>						
<b>Meet the users where they are -- Be as usable as Google – but more useful than Google</b>						
1.1. Implement new tools, methods, and practices that promote fast and easy information retrieval for students, faculty, and other researchers.	a. Assess student and faculty use of selected information discovery tools and services; understand study/ research habits and preferences of students and faculty to inform decisions	A study will be completed to assess current research behaviors of BYU students and faculty; results will be available to all library personnel.	Julene Butler, Brian Roberts	Apr '08		

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1.1. Implement new tools, methods, and practices that promote fast and easy information retrieval for students, faculty, and other researchers.	on library systems and web page design.					
	b. Implement Primo. [NEW]	Technical implementation will be completed to serve the goals of 1.1.d.	Bill Lund, Grant Laycock	beta test by Summer '08; release Fall '08	OIT funding for servers.	Awaiting approval of OIT funding request for servers.
	c. Implement SFX and Verde. [NEW]	Technical implementation will be completed to serve the goals of 1.1.d.	Bill Lund, Jared Howland	beta by Nov '07; release Jan '08		SFX/Verde purchase approved.
	d. Adjust web page in response to implementation of major new discovery tools and utilizing data gathered through Goal 1.1.a.	Primo, SFX, and other new discovery tools will be presented on the library web page for maximum research benefit; other necessary changes made.	Julene Butler, WWG Chair	Beta by Apr '08; release Fall '08		WWG is in process of reorganizing the web page. Must organize new project to add Primo to the home page.
	e. Identify and implement levels of cataloging used to expedite processing, allowing faculty and students to quickly and easily discover library holdings.	Guidelines outlining cataloging levels will be implemented.	Robert Murdoch, John Wright, Robert Maxwell	Dec '07		Work has been started on the identification and documentation of cataloging/metadata levels.

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1.1. Implement new tools, methods, and practices that promote fast and easy information retrieval for students, faculty, and other researchers.	f. Implement Shelf Ready program with firm order. [NEW]	Assessments will determine whether Shelf Ready materials are processed more quickly, at lower expense, and with comparable quality. Results will influence whether Shelf Ready is expanded to include the approval program.	Robert Murdoch, John Wright, Carla Kupitz	Dec '07	Identify permanent funding source if Shelf Ready proves successful.	Profile for Shelf Ready Cataloging for firm order materials has been established with vendor. Internal systems issues have been accommodated.
	g. Develop policies for applying catalog rules and practices that differ from national standards to guide decision-making for special cataloging/metadata requests; reassess past cataloging decisions. [NEW]	A policy statement will be in place that includes criteria to guide decision making on specialized cataloging requests.	Robert Murdoch, John Wright, Robert Maxwell, Carla Kupitz	Jan '08		
	h. Enhance student and faculty discovery of library resources through open search engines (e.g. tools identified through Goal 1.1.a) including greater exposure to e-journals.	Library resources (both licensed and owned) will be broadly available via search engines preferred by students and faculty.	Bill Lund, Jared Howland, Programmer	Apr '08		Many library owned resources are visible to Google Scholar.
	i. Pursue INDI Phase II. Investigate feasibility of a collaborative development project with UALC partners.	Beta testing of will be in process.	Scott Duvall, Bill Lund	Aug '08		

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	[NEW]					
	j. Working with the Faculty Library Council and Student Advisory Council, discover what processes, services, and resources are most desired in Blackboard. [NEW]	Actionable feedback from the FLC and SAC.	Terry Dahlin, Allyson Washburn	April 2008		
1.2. Eliminate all backlogs and ensure that no new backlogs accrue.	a. Adjust resources, workflow, policies, and practices to prevent new backlogs; understand how outsourcing can improve backlog prevention; reallocate resources to outsourcing as appropriate.	i. The Library moratorium on receiving gifts in Music and Dance with the exceptions of Viola, Harp, and Mormon Music will remain in effect until backlog is eliminated.	Scott Duvall, Janet Bradford	until Dec '11		
		ii. Outsourced work (including Authority Control—see item 1.2.f) will be assessed and compared with traditional practices in terms of expense, productivity, and quality.	Robert Murdoch, John Wright, Shannon Hoffman	Apr '08		The Cataloging Services Department is gearing up for outsourcing of many items.

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1.2. Eliminate all backlogs and ensure that no new backlogs accrue.	b. Reduce all remaining manuscript processing backlog.	i. The remaining 50% of the backlog of manuscript collections needing preliminary bibliographic control will be eliminated.	Scott Duvall, Robert Murdoch	Dec '08		50% of the manuscript backlog is described, but not yet entirely entered into the system.
		ii. The resulting worksheets will be entered into the library catalog.	Scott Duvall, Robert Murdoch	Dec '08	Reallocate student resources as needed	
	c. Inventory and reduce Special Collections print backlog by 50% (including microform ).	The volume of identified backlog will decrease by 50%.	Robert Murdoch, Scott Duvall	Jun '09	2 temporary part-time faculty catalogers	Work is currently in process for Special Collections microform.
	d. Eliminate another 30% of Music/Dance backlog.	Another 30% of music scores, recordings, and print collections will be cataloged so that by Dec. '08, 50% of the backlog will have been eliminated.	Scott Duvall, Janet Bradford	Dec '08	Additional student wage and part-time funds, commensurate with that received in 2007, will need to be allocated in 2008	20% of music backlog is already completed.

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	e. Eliminate remaining 50% of: •book repair processing backlog, and •general collections backlog in cataloging including periodicals and juvenile literature.	No backlog will remain in cataloging general collections, periodicals, juvenile literature, or in book repair processing.	Robert Murdoch	Dec '08		
	f. Outsource backlog of authorities records.	The authority records backlog will be eliminated.	Robert Murdoch, John Wright, Shannon Hoffman	Dec '08		John Wright and Shannon Hoffman are completing details with vendor for outsourcing agreement.
1.3. Develop and implement a plan for preserving and providing access to commercial and BYU produced resources.	a. Determine the software platforms to be used for the digital preservation program and institutional repository for the next 5 years.	Documentum, DSpace, and/or Fedora will have been selected as the software platform(s) for digital preservation and the institutional repository and an implementation plan put in place.	Scott Duvall, Chris Erickson, Jeff Belliston, Open source programmer	Apr '08		Documentum phase I is in place, and test loads of Herculaneum and Dead Sea Scrolls have been successful. DSpace has been reviewed for preservation purposes.
	b. Develop procedure plan for licensing AV materials for on-demand delivery. [NEW]	AV materials will be licensed and documented.	Robert Murdoch, Tom Wright, Jared	Jan '08		A project team has been created and is currently working on the "LRC 100."

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	c. Develop a fast, easy, and searchable delivery mechanism for AV on-demand resources.	An on-demand service will be hosted by the library in collaboration with OIT.	Howland Bill Lund, Scott Eldredge	Alpha test: Sep '07 Beta test: Nov '07 Released: Jan '08		Code is in testing.
<b>STRATEGY #2: Recruit and develop quality employees who are adaptable and willing to deal with challenges of the future</b>						
2.1. Expect and enable employees to acquire and update skills necessary to contribute to the strategic directions of the library.	a. Develop and implement an ongoing training and development program. [NEW]	An ongoing training and development program responsive to needs of library employees will be developed and ready for implementation across the library.	Julene Butler, Quinn Galbraith, LCC	Apr '08		HR currently organizes at least one faculty training each year and, in conjunction with LSSA, organizes other trainings for staff/ admin employees. Techopoly Challenge is underway for '07-

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						'08.
	b. Formalize library employee participation in leadership/management training programs.	Leadership/ management training programs will be identified and attendance by appropriate library employees will be facilitated.	Julene Butler, Quinn Galbraith	Aug '08		Several librarians have attended campus and nationally sponsored leadership programs.
	c. Develop and implement formalized training for new department chairs. [NEW]	All new department chairs will receive training to assist them in their new role.	Julene Butler, Quinn Galbraith	Apr '08		
2.2. Clearly identify organizational needs and repurpose positions as necessary to accomplish strategic directions of the library.	a. Articulate and prioritize the library's unmet personnel needs during the next 3-5 years.	Library personnel needs will be articulated and an updated prioritized list will be developed.	Julene Butler; Randy Olsen; LCC; AC	Dec '07		Two of the five current prioritized positions { Open Source Programmer & Web Designer } are now open and will be filled Fall '07.
	b. Assess the organization and identify areas where structural change is necessary.	i. The success of the 2007 organizational restructuring in the Catalog Department and Information Technology Division will be assessed and recommendations for additional change in these and/or other areas developed if necessary.	Randy Olsen, Julene Butler	Jun '08		Catalog specialist positions have been added, two catalog departments exist, and one temporary catalog unit is being evaluated to determine ongoing placement of personnel. The LIT

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2.2. Clearly identify organizational needs and repurpose positions as necessary to accomplish strategic directions of the library.						Division is organized; new AUL for Information Technology is now faculty status.
		ii. The success of the satellite library services experiments will be assessed and recommendations offered for changes in science and business reference service	Terry Dahlin; Brian Roberts	Aug '08		Satellite library services will be offered in School of Engineering Fall '07.
	c. Clarify the relationship among digital library, institutional repository, and digital preservation (including records management) to determine whether organizational change would bring benefit. [NEW]	The digital library, institutional repository, digital preservation, and records management programs will be clearly defined and an organizational structure put in place that facilitates collaboration and minimizes overlap of assignments.	Randy Olsen	Apr '08		These three units are functioning well but there is overlap in responsibilities and some confusion over appropriate communication lines.

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2.3. Improve library faculty recruitment and hiring processes.	a. Complete the evaluation of the library faculty search and screen process which was begun in 2006/2007 and adjust procedures accordingly.	Proposed changes will be discussed further by library faculty; adjustments will be approved by AC and implemented in all new Search & Screen Committees.	Julene Butler	Dec '07		Members of five search and screen committees were interviewed during 2006-07. Additional suggestions came from library faculty in Apr '07.
2.4. Ensure that safety and security issues in the HBLL are appropriately addressed. [NEW]	a. Form a new Safety & Security Working Group (SSWG) charged with reviewing and enforcing library safety standards and security policies. [NEW]	SSWG will have prioritized action items from the 2006 Risk Analysis Report; items prioritized for December 2007 will be completed; action plans for items in next priority category will be established.	Julene Butler, Justin Stewart	Apr '08	Additional 10-hour student	A risk analysis project was completed in 2006. A task force has completed initial analysis of recommended action items and is in process of prioritizing those items that have library-wide impact.

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2.4. Ensure that safety and security issues in the HBLL are appropriately addressed.	b. Establish a sub-group within SSWG to look at safety and security issues in Special Collections. [NEW]	Items related to Special Collections in the 2006 Risk Analysis Report will be prioritized; items prioritized for December 2007 will be completed; action plans for items in new priority category will be established.	Scott Duvall, Brad Westwood	Apr '08	Same student as above	Many action items generated by the risk analysis project focused on Special Collections. The SSWG Special Collections sub-group has been identified and has begun its initial work.

**STRATEGY #3:**

**Partner with the academy to enrich teaching, learning, and research**

3.1. Improve information literacy instruction.	a. Create a position in LIIL responsible for addressing online/mobile instruction and reference services. [NEW]	The creation of new online instruction and reference approaches will be in production.	Terry Dahlin, Suzanne Julian	Dec '07	1 new 20-hour student position	One GIS staff position has been repurposed for this function.
	b. Improve information literacy instruction for advanced writing students. [NEW]	The first phase of the LIIL strategic plan for advanced writing will be vetted, approved, and implemented.	Terry Dahlin, Suzanne Julian	Aug '08	1 new 10-hour student position	A working draft of the strategic plan for advanced writing has been prepared.

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3.2. Strengthen the liaison program to increase faculty awareness of library services and resources, enabling their success as teachers and researchers.	a. Implement faculty liaison standards for subject librarians and curators.	Subject librarians and curators will have set faculty liaison plans and goals for 2008.	Terry Dahlin, Robert Murdoch, Scott Duvall	Feb '08		A document on faculty liaison standards has been prepared for review by subject librarians.
	b. Assess the success of the faculty liaison program [NEW]	A system of regular assessment of the faculty liaison program will be implemented.	Terry Dahlin, Tom Wright	Aug '08		
3.3. Increase institutional and faculty awareness of scholarly communications. [NEW]	a. Foster administrative awareness of scholarly communication issues and of commitment for the new role of Faculty Library Council as the university's scholarly communications committee. [NEW]	University Administrators will approve and endorse the new role of Faculty Library Council. FLC members will develop a scholarly communications action plan for campus.	Randy Olsen; Jeff Belliston	Apr '08		Preliminary support for a revised FLC charge has been received from Brent Webb.

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3.3. Increase institutional and faculty awareness of scholarly communications.	b. Raise faculty awareness of and commitment to finding solutions to problems with the existing scholarly communications system. [NEW]	Scholarly communications issues will be shared with campus faculty via a refreshed website and regular news articles. Faculty Advisory Council will endorse a resolution supporting open access to publicly funded research.	Randy Olsen, Jeff Belliston	Apr '08		
	c. Increase use of institutional repository.	Ten new collections will be loaded into the institutional repository.	Terry Dahlin, Jeff Belliston	Dec '08	2 new 20-hour student positions	Four major collections have been identified for inclusion.

**STRATEGY #4: [REVISED WORDING]**

**Curate content and build collections that allow ubiquitous access for users and offer flexibility in teaching, learning, research and use of library space**

4.1. Transition the focus of content curation and collection development from primarily print to largely digital formats, while recognizing that print will remain important in some disciplines. [NEW]	a. Write and adopt general collection development and content management guidelines reflecting greater focus on eJournal and eBook acquisitions. [NEW]	New guidelines/policies/procedures will be distributed to library employees for input, discussion, and approval.	Robert Murdoch, Tom Wright	Dec '08		This purchasing trend has already begun.
	b. Transition periodical and reference material collection building and retention from paper format to digital/	Acquisition reports will document expenditures reflecting this change. Library shelving space	Robert Murdoch, Tom Wright	Dec '08		Patron usage data is illustrating overall preference for digital periodicals and

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4.1. Transition the focus of content curation and collection development from primarily print to largely digital formats, while recognizing that print will remain important in some disciplines.	electronic format.	will show impact.				reference materials.
	c. Investigate how to improve user experience with eBooks [NEW]	Develop and present a proposal to AC.	Bill Lund, Michael Whitchurch	Apr '08		Four Sony readers and one i-Rex reader are currently available for internal use and experimentation.
4.2. Develop strategies to maximize use of existing collection space.	a. Identify duplicate, low-use and “no longer needed” monographs, serials, and AV materials owned by BYU Provo/BYU-H/BYU-I. Weed, digitize, or repair items based on updated policy.	Reported collection assessments focused on usage and need will be generated, along with reports illustrating CCLA collection overlap and uniqueness. Deselection policy will be updated.	Robert Murdoch, Ranny Lacanienta, Tom Wright	Dec '08	Funding for OCLC Collection Assessment Tool (\$12,000)	A deselection project in the Ks is currently in process.
		An average of 1,000 items per month will be processed for deselection or auxiliary storage, reducing consumption of available shelf space.	Robert Murdoch, Sharolynn Pyeatt	Dec '08		
	b. Collaborate with UALC libraries in developing a coordinated collection development and content management plan that minimizes duplication.	The Lee Library will be well represented in UALC committee discussions and projects related to collection coordination and space sharing.	Robert Murdoch; UALC CD rep	Jan '09		

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4.3. Explore the possibility of expanding dense storage capacity for general and special collections.	a. Review the 2007 space inventory of general collections and generate recommendations for action.  Develop and review space needs projections and proposed solutions for Special Collections division.	Develop and present proposal(s) to AC.	Robert Murdoch, Scott Duvall	Apr '08		Additional compact shelving is being installed on Level 1 south; initial use will be storage of journals which are available electronically.
4.4. Define strategies for dealing with a low- or no-growth collection development budget in one or more years. [NEW]	Develop collection development and content management plan to guide budget allocation, spending priorities, and deselection decisions based on: 1) no-growth budgets, and 2) 5% reduction in overall materials budget scenarios.	Planning documents will be developed, reviewed, and completed.	Robert Murdoch, Tom Wright	Jan '08		