

# Fiscal Year 2015 Plan

## University Library

### VISION

The Portland State University Library is a 21st century library at the center of the academic life of our students and faculty. We support research, teaching and learning at Portland State amidst a constantly changing environment. We are dedicated to improving student success, providing the information resources faculty and students need, and offering outstanding special collections and archives featuring unique materials that delight and engage our community. We strive to be a great library that constantly adapts, rethinks, innovates, and looks to the future, while also being thoughtful stewards of our intellectual past.



Marilyn K. Moody, Dean  
Portland State University Library

PO Box 1151  
Portland, OR 97207

503.725.4616

<http://library.pdx.edu>

### THEMES

#### A. SUPPORT STUDENT SUCCESS:

Support student success in ways that improve student learning, provide positive student experiences, and contribute to student retention and graduation.

##### *Key strategies*

1. Collaborate with faculty and other student success partners to integrate in-person and point-of-need learning opportunities
2. Enhance the library's virtual learning spaces through continuous improvement of its online presence and integration with University online learning environments
3. Provide high quality information discovery and access tools, and integrate at point of need
4. Look for ways to help decrease the cost of instructional educational resources for our students
5. Assess and evaluate library resources, services, and practices to determine the best ways to support student success
6. Offer inviting and diverse study and learning environments within Millar Library that meet a range of student needs

## **B. ENABLE FACULTY SUCCESS:**

Enhance faculty success in their research and teaching through vibrant partnerships with library faculty and staff. Provide access to high quality information resources.

### *Key Strategies:*

1. Collaborate with faculty to ensure efficient and reliable access to the information resources they require for research and teaching
2. Continue the development of strong liaison librarian-faculty relationships
3. Facilitate the use of library materials in teaching
4. Increase faculty awareness of resources and services
5. Support faculty participating in reTHINK PSU Provost's Challenge projects
6. Assist faculty with data management planning related to grant applications and other research projects
7. Collaborate with faculty to ensure students master learning outcomes related to critical thinking and effective use of information that prepare them for the global economy
8. Assist and collaborate with faculty in identifying publishing options, especially open access and newly emerging forms of digital publishing

## **C. EXPAND RESOURCES AND IMPROVE EFFECTIVENESS:**

Expand and use resources strategically while constantly improving our effectiveness.

### *Key Strategies:*

1. Review processes and procedures to identify changes that may result in more streamlined and effective workflows
2. Prioritize Library Development activities in order to strategically expand our resources
3. Encourage and support professional development and training opportunities for library faculty and staff, along with skills assessment and improvement
4. Seek efficiencies through strategic upfront investments
5. Assess user needs for and satisfaction with library services and resources
6. Provide continued evaluation of current resources and services to identify areas of improvement and replacement
7. Prioritize using resources to provide high quality and effective basic services

## **D. SET PSU APART:**

Collaborate with students and faculty to gather, preserve, and make accessible the intellectual work of the University; digitize and make accessible unique materials and collections; provide services for publishing and hosting conferences.

### *Key strategies:*

1. Preserve and provide open access to the scholarly work of PSU faculty and significant student work in the institutional repository PDXScholar
2. Collaborate with faculty to publish, in an open access format, monographs, journals, articles, conference materials, and course materials
3. Provide digital access to unique collections in PSU Library's Archives and Special Collections
4. Analyze and assess the unique aspects of our library collections and institutional intellectual contributions and highlight and showcase those aspects
5. Invest in Special Collections and University Archives, expanding resources devoted to these efforts

## E. ENGAGE OUR COMMUNITY:

Extend the Library's impact to the local and regional community through outreach, programs, and collaborations, and to the broader library community through scholarship and service to professional organizations.

### *Key strategies:*

1. Develop strategic partnerships with PSU programs that reach out to the Portland-area community
2. Develop and assess collaborations with regional libraries and universities and external organizations such as the Orbis Cascade Alliance and Oregon Health and Sciences University (OHSU)
3. Develop a communication plan for reaching the broader community in a targeted and impactful way
4. Pursue scholarly activities that contribute to the field of librarianship
5. Develop relationships with key campus units and student groups

# FY15 PRIORITIES

These priorities will enable the Library to succeed in each of the Library's themes, both now and in the future.

## ***PRIORITY***

## ***RELATED THEME***

### **LIBRARY AND UNIVERSITY PLANNING**

Portland State University will engage in strategic planning during FY 15. Part of this process will also support and inform strategic planning at the unit level. The Library will be completing its individual strategic plan as part of this process. The Library will also engage in budgetary and personnel planning.

#### *By July 1, 2015, we would like to:*

- Develop and implement the planning process for Library strategic planning, with active engagement of library faculty and staff C
- Complete the Library Strategic Plan C
- Participate in developing and shaping the University strategic plan C
- Complete Library budgetary and personnel planning for FY16 C7

**ENGAGING IN CAMPUS-LEVEL INITIATIVES AND PRIORITIES**

Library faculty and staff will actively engage in and contribute to university-wide initiatives and priority areas: A, B, C, D

- reTHINK PSU;
- online learning programs;
- collaboration with the Office of Academic Innovation (OAI);
- reducing student costs;
- open textbooks initiatives;
- internationalization;
- diversity;
- student success initiatives; and
- academic program prioritization.

**SPACE AND COLLECTION PLANNING**

Improve effective use of Library Space and make long-term plans to position the Library for renovations. Manage Library collections to enable effective use our physical collections. Plan for ways to provide more and better quality study space; space for collaborative learning; and technology-enhanced areas.

*By July 1, 2015, we would like to:*

- Complete the Millar Library Space Planning and Feasibility Study A6
- Review architectural study results and incorporate phased-renovation recommendations into space and collection management A6
- Align collection retention decisions with the Orbis Cascade Alliance 'last copy' policy, participation in DPR (Distributed Print Repository) and WEST (Western Storage Trust), and federal and state depository regulations A5, A6, C
- Optimize use of current storage spaces for Special Collections and University Archives and incorporate onsite storage considerations in to facilities planning C6, C7

**ACQUISITIONS**

Develop strategies for optimizing the acquisitions budget to support opportunities for retaining and acquiring access to information resources, especially through the Orbis Cascade Alliance.

*By July 1, 2015, we would like to:*

- Explore SILS capabilities and develop Library analytic and statistical reports in support of decision making C1, C6
- Track expenditures monthly for sharing as part of the Library’s ongoing budget review C6, C7
- Facilitate evaluation of library resources in order to create and curate collections that support the University’s teaching, research, and scholarship activities A5, C5, C6

**PRIORITY**

**RELATED  
THEME**

- Integrate Federal and State government documents acquisitions and processing into the Library’s Acquisitions Unit C1, C6
- Target next Hunter acquisition for Special Collections in collaboration with teaching faculty B3, D5

**INSTRUCTION**

As librarians increasingly provide instruction for online only and hybrid classes, strengthened relationships with the Office of Academic Innovation and related professional development opportunities are valuable. Optimize the availability and use of learning objects in order to assist the greater Portland State University community in identifying, locating, analyzing, evaluating, using, and referencing information.

*By July 1, 2015, we would like to:*

- Complete the learning objects associated with the *Digital Badges for Creativity and Critical Thinking* and *University Studies Online General Education Pathways* Provost’s Challenge projects A1, A2, A3, A5, B3, B4, B5, B7, E5
- Continue to evaluate existing learning objects and identify new learning objects needed A1, A2, A5, B3, B4, B5, B7
- Evaluate access to learning objects for internal and external audiences A1, A2, A3, A5, B3, B4, B5, B7, C5
- Update Library Instruction web pages, reflective of librarians’ innovative, collaborative work with teaching faculty A1, A2, A3, A5, B3, B4, B7
- Continue to collaborate with teaching faculty and OAI regarding online instruction methods and design, including continuing to engage in experimental, collaborative instructional models such as those developed through the Provost’s Challenge and reTHINK PSU A1, A2, A3, A5, B3, B4, B5, B7, C5
- Support professional development opportunities related to instructional design C3

**REFERENCE**

Provide uninterrupted 24/7 reference service to the greater Portland State University community by examining our virtual reference platform and service options.

*By July 1, 2015, we would like to:*

- Continue to evaluate onsite and virtual reference staffing C1, C6
- Monitor Answerland & Spark developments A2, A3, C1, C6, C7
- Evaluate all major chat services including costs, features, and options for 24/7 backup A2, A3, C1, C6, C7
- Plan for the direction of PSU’s virtual reference services, including 24/7 coverage A2, A3, C1, C6, C7

**PRIORITY**

**RELATED  
THEME**

- Implement the virtual reference service plan

A2, A3, C1,  
C6, C7

**DIGITAL SCHOLARSHIP, PUBLISHING, DIGITAL INITIATIVES, DATA  
MANAGEMENT & SCHOLARLY COMMUNICATIONS**

Expand awareness of scholarly communication services and improve scholarly communication materials for users. Continue to expand awareness of PDXScholar and our services. Expand awareness of data management services on campus and extend the services offered beyond help developing data management plans.

*By July 1, 2015, we would like to:*

- Systematically expand coverage to achieve greater balance of scholarship and research in PDXScholar B2, B4, B8, D1
- Continue digitizing older dissertations and theses A3
- Work with reTHINK PSU project team to get all completed PDX Open textbooks into PDXScholar B5, B8, A4, D2
- Deposit one major data set into PDXScholar B1, B4, B6, D1
- Perform a data management audit with one faculty member B6
- Strengthen and broaden internal workflows and communication channels (e.g., between digital initiatives staff and liaisons, expanding awareness among Library faculty and staff) A5, B2, B7, B8, D1, E5
- Strengthen online resources for faculty and graduate students B1, B4, B6, C5
- Increase departmental, faculty, and student participation in PDXScholar B2, B4, B8, D1
- Continue to promote awareness of open access within departments B4
- Continue publishing journals and conferences hosted in PDXScholar B2, B4, B8, D1, D2
- Pursue and improve partnerships with campus constituencies, specifically: B2, B4, B6, E5
  - Statistics Consulting Lab
  - Survey Research Lab
  - Research and Strategic Partnerships
  - Office of Academic Innovation
  - Academic & Research Computing
  - Office of Graduate Studies
- Work directly with PSU Centers and Institutes to increase coverage in PDXScholar B2, B4, B6, E5

**SHARED INTEGRATED LIBRARY SYSTEM (SILS)**

Implement features and functionality of the Orbis Cascade Alliance SILS. Use SILS efficiencies to optimize end-user experiences and staff resources. Continue the refinement and customization of Primo and Alma to meet the needs of the Portland State community.

*By July 1, 2015, we would like to:*

- Update eJournal and eBook links to provide seamless user access, target December 1, 2014 A3, A5, B1, B3, C1
- Transition library services (course reserves, eJournals A-Z list, finding known articles, etc.) into the SILS, target fall 2014 A3, A5, B1, B3, C1, E2
- Continue to customize and refine the user discovery interface to optimize the user experience A3, A5, B1, B3, C1, A2
- Successfully migrate from the Summit Navigator interface to Summit 3, early 2015 A3, A5, B1, B3, C1, E2
- Implement data exchange between Alma and the Portland State University enterprise system for user and fiscal information A3, C1
- Explore capabilities and develop Library analytic and statistical reports C1, C5, C6
- Develop effective procedures and processes to relocate resources within the Library and between the Library and the Annex and for removing materials from the library collections C1, C6
- Participate in and/or lead internal and Alliance SILS professional development activities C3, E2
- Identify and create new workflows in the Shared Integrated Library System (SILS) in order to utilize staff resources effectively and take advantage of new functionality A5, C1, C6, E2
- Continue development of collaborative policies and shared processes within the Alliance and between Alliance libraries C1, C3, E2

**WEBSITE & RELATED SYSTEMS**

Continue development of the Library’s website and related systems. Establish policies and practices for effectively managing and supporting the website.

*By July 1, 2015, we would like to:*

- Complete roll out of revised website using new CMS A2, A3, A5, B3 B4, C4
- Define and implement an organizational structure and workflow clarifying the roles and responsibilities for effectively managing the Library's website content and systems C1

**RELATED  
THEME****PRIORITY**

- 
- Develop a process for identifying and prioritizing ongoing website-related projects A1, A2, A3, A5, B1, B3, B4, C1, C5, C6, C7
  - Update library resources and learning objects to reflect discovery service and website changes A1, A2, A5, B3, B4, B5, B7
  - Complete update of Special Collections & University Archives web pages A2, A3, A5, B1, B3, B4, D3, E3
  - Identify platform for online finding aid delivery for Special Collections & University Archives and begin planning for implementation by FY16 C4, C5, C6, C7, D4, D5
  - Explore opportunities for including responsive design in external systems A2
  - Continue to develop and refine the Library's website content management system including improving mobile device access to library resources and services and aligning the user discovery interface with the Library website, focusing on optimizing the user experience A2, A3, A5, B3, B4, C5, C6
  - Provide professional development opportunities on effectively creating website and instructional content C3
  - Prepare to migrate to LibGuides 2.0 and investigate implementing additional features A1, A2, A3, A5, B1, B3, B4, C5, C6

**DEVELOPMENT**

Increase development activities and results in order to provide additional funding and opportunities for the Library. This includes annual fund giving, asks to individual donors, stewardship of donors, development of proposals, and communications to current and potential donors.

*By July 1, 2015, we would like to:*

- Attain or make significant progress towards Library FY15 Development Goals for funding and Library metrics C2
- Expand the Library Advancement Council C2
- Expand Development Communications, incorporating key library messages as developed C2, E3
- Average at least one significant donor contact or event per week by a member of the Library Development Group and maintain time spent supporting Development activities C2
- Increase the number of library donors and contacts with individual donors C2
- Review/update case statements C2, E3

**RELATED  
THEME****PRIORITY**

- |  |        |
|--|--------|
| <ul style="list-style-type: none"> <li>• Work with Foundation to generate proposals to foundations (non-government grants)</li> </ul>  | C2     |
| <ul style="list-style-type: none"> <li>• Partner with at least one community partner to draft project plan for collection development within Special Collections and pursue funding opportunities to support plan</li> </ul> | C2, E1 |

**COMMUNICATIONS & OUTREACH**

Develop and implement a comprehensive library communications plan that includes key messages, with the goal of increasing use of current collections and services and increasing interest from donors and potential donors in PSU Library. Communication channels include digital signage, library news, library mailings, social media, print brochures and handouts, liaison communications with faculty, and University Communications.

*By July 1, 2015, we would like to:*

- |   |                |
|---|----------------|
| <ul style="list-style-type: none"> <li>• Create library student advisory board, to assist in assessment and evaluation of library resources, services, and practices, and advise on library communication channels</li> </ul>                 | A2, A5, C5, E5 |
| <ul style="list-style-type: none"> <li>• Create workflow for library communications requests (including news items, social media posts, and flyers and graphics) from library faculty and staff as well as from other campus units</li> </ul> | C1             |
| <ul style="list-style-type: none"> <li>• Draft an outreach plan for Special Collections &amp; University Archives and for Digital Initiatives</li> </ul>  | E1, E3, E5, D4 |
| <ul style="list-style-type: none"> <li>• Post news items to library website averaging once a week; postings to social media are more frequent and tailored to medium.</li> </ul>  | A2, B4, E3     |

**ASSESSMENT**

Review, analyze, and catalog our current assessment efforts and data. Explore alternatives to current practices and new opportunities.

*By July 1, 2015, we would like to:*

- |  |            |
|--|------------|
| <ul style="list-style-type: none"> <li>• Investigate survey options beyond LibQUAL+ and make recommendations</li> </ul>  | A5, C5, C6 |
| <ul style="list-style-type: none"> <li>• Develop an Assessment &amp; Reporting Calendar (including reporting Library Valuation Statistics, accreditation reports, accreditation, and others)</li> </ul>  | C1, C6     |
| <ul style="list-style-type: none"> <li>• Track internal Library assessments</li> </ul>   | C1, C6     |
| <ul style="list-style-type: none"> <li>• Develop list of data we have or could have, including noting who has access and how data is shared (e.g., Alma analytics, PDXScholar, EZProxy Stats)</li> </ul> | C1, C6     |
| <ul style="list-style-type: none"> <li>• Create a plan for sharing assessment data, including determining which data to share with various audiences and how to share it</li> </ul>                      | C1, C6     |

# President's Themes

- *Provide Civic Leadership Through Partnerships*  
Lead as a civic partner, deepen our engagement as a critical community asset, demonstrate leadership in regional innovation, and serve as an anchor institution in the Metro area.
- *Improve Student Success*  
Ensure a student experience that results in higher satisfaction, retention, and graduation rates.
- *Achieve Global Excellence*  
Distinguish the institution nationally and internationally through the accomplishments of its faculty, reputation of its programs, and preparation of its students for the global economy.
- *Enhance Educational Opportunity*  
Ease the transition and create more effective pathways for students to move from K-12 to higher education.
- *Expand Resources and Improve Effectiveness*  
Expand resources in each of the funding streams (state, private, business partnerships, research, tuition), manage resources effectively, and match investments to strategic priorities.