

Portland State University Library
2015-2016 Annual Plan

The Library FY16 Annual Plan focuses on new initiatives and improvements. Library faculty and staff engage in many essential activities, not highlighted here, without which the Library couldn't function. Some of these activities are featured in the [Library's Organizational & Statistical Profile](#).



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University
Library

PORTLAND STATE UNIVERSITY

Goal 1: Support student success with library services, collections, and spaces that meet students' educational, research, and informational needs in equitable and inclusive ways.

Objective 1.1: Develop physical environments to meet students' diverse needs that help students succeed.

Action 1.1a: Improve the mix of study, technology, group, individual, quiet, silent, and social spaces.

Objective 1.2: Make resources that students need more accessible and affordable.

Action 1.2a: Evaluate and implement plans to reduce student costs for textbooks and course materials in collaboration with key partners.

Action 1.2b: Expand the number and types of technological resources available to students at the Library.

Objective 1.3: Enhance access to and awareness of the Library's information resources and services to better serve students.

Action 1.3a: Assess, analyze, and prioritize resources, collections, and services.

Action 1.3b: Develop the Library's collections to better serve students.

Action 1.3c: Evaluate and develop approaches for services and resources.

Objective 1.4: Continue to offer excellent direct user interactions at service points in the Library.

Action 1.4a: Assess, analyze, prioritize, and refine services.

Annual Actions (2015-2016)

**Strategic
Plan
Reference**

1. Begin collection relocation and deselection projects.

1
5.1

Indicators of Success: Items within Z call number range evaluated and relocation/deselection begun, followed by the Qs. Map withdrawal project completed, collection shifted, and extraneous cases removed. Selective weeding of print reference collection undertaken to highlight more useful and current resources.

2. Prepare a plan for creating a silent study space.

1.1

Indicators of Success: Silent space plan created.

3. Develop a roadmap for the inclusion of additional technology-based Library study rooms. 1.2b
5.3a

Indicators of Success: Room types defined with associated costs and recommendations for the upgrading of additional study rooms put forward.

4. Assess accessibility of Special Collections reading room and identify possible accommodations and improvements to space. 1.1a

Indicators of Success: Space assessment with Facilities representative completed and report shared with Library Administration.

5. Expand publishing activities that lower students' costs and expand impact of PSU authors. 1.2a

Indicators of Success: Published 5 or more (as funding is available) new textbooks. Developed and shared promotional materials and provided leadership in PSU initiative. Explored opportunities to publish open education resources that have already been created.

6. Respond promptly to eResources access and technology issues and communicate effectively with Portland State reporters, vendors and colleagues. 1.4
1.3

Indicators of Success: Reported access issues are acknowledged, identified and resolved within a reasonable time frame. Communication with the reporter is timely, informative, well-written and approachable.

7. Implement techniques for improving print- and e-reference discovery. 1.3

Indicators of success: Created or adopted widgets and other tools to enable search and retrieval of print and e-reference resources

8. Continue to expand access and increase awareness of ETDs through additional digitization and through improved workflows. 1.3b

Indicator of Success: Increased the number of older ETDs available in PDXScholar. Downloads and usage of ETDs increased. The management and workflow of ETDs embargoes and metadata streamlined.

9. Enable effective discovery of, and access to, library resources. 1.2
1.3
Indicators of Success: Library resources are discoverable through the library catalog and access to eResources is seamless. Unique library holdings are prioritized, cataloged and discoverable. 2.2b
2.4c
3.1
3.1b
10. Conduct a needs assessment for devices loaned for student use. 1.2b
Indicators of Success: Evaluation completed and recommendations made regarding devices loaned for student use.
11. Conduct and evaluate meetings of the Library Student Advisory Group, and assess student participation. 1.3
4.4
Indicators of Success: At least 4 meetings held with at least 8 students each. Input assessed and shared.
12. Revise student employment program at the library. 1
5.1
Indicators of Success: Student employee retention rates improved and better services provided.
13. Improve training for Access Services staff and student employees by holding a training session in September 2015 and creating a detailed manual of Circulation policies and procedures. 1.4
Indicators of Success: Students and staff are more confident in patron transactions; student employees know who to go to when they have questions.
14. Improve access to the collection by accurately re-shelving returned materials within 24 hours. 1.4
Indicators of Success: More space in sorting area; patrons able to find recently returned materials.
15. Improve access to virtual reference services through the implementation of a new chat client and the effective integration of the new chat client into the library's website and Portland State's Learning Management System. 1.3c
3.1b
3.1d
Indicators of success: A new chat client implemented. The new widget added to Portland State's Learning Management System. There may be an increase in chat and email questions.

16. Monitor reference services and adapt staffing accordingly.

1.4a

Indicators of success: Periodic adjustments to reference and chat staffing made. Reference desk hours and staffing of chat by PSU reviewed and recommendations made. Reference questions reviewed periodically for patterns/needs and assessed whether additional learning objects are needed or require revision.

Goal 2: Promote and support instructional and research activities and information needs in equitable and inclusive ways.

Objective 2.1: Improve research support.

Action 2.1a: Analyze current research trends and use of resources.

Action 2.1b: Support faculty with funded activities.

Action 2.1c: Increase awareness of data management and scholarly communication services.

Action 2.1d: Evaluate and address research needs of academic units.

Action 2.1e: Support faculty success by highlighting research accomplishments.

Objective 2.2: Increase faculty satisfaction with collections and services.

Action 2.2a: Assess and analyze faculty collection and service needs.

Action 2.2b: Increase awareness of library services, including new and evolving services.

Action 2.2c: Create a long-term collection development plan.

Objective 2.3: Engage with faculty regarding instruction, curricular support, and course design.

Action 2.3a: Work with faculty, Office of Academic Innovation (OAI), and other units to develop courses and programs.

Action 2.3b: Support faculty efforts to incorporate campus-wide learning outcomes into curricula.

Action 2.3c: Proactively address the needs of adjunct faculty.

Action 2.3d: Guide faculty in incorporating library materials and open educational resources in instruction and course design.

Objective 2.4: Provide guidance and expertise to faculty regarding library resources and services.

Action 2.4a: Develop and define our role in regards to copyright guidance within the context of the campus community.

Action 2.4b: Increase awareness and use of specialized platforms offered by the Library.

Action 2.4c: Expand understanding and awareness of the Library's ability to enhance faculty success.

Action 2.4d: Leverage and diversify partnerships to expand content in PDXScholar.

Action 2.4e: Provide education and expertise for data management and scholarly communications.

<i>Annual Actions (2015-2016)</i>	<i>Strategic Plan Reference</i>
17. Purchase five ORCID APIs and work with Research and Strategic Partnerships to implement this standard into research oriented tools across campus including SelectedWorks as well as any current research information systems.	2.1b 2.1e 4.4b
Indicators of Success: Implementation plan developed with full implementation in at least one research-oriented tool on campus.	
18. Develop collection analysis criteria to be applied across the collections.	1.3a 1.3b
Indicators of Success: Documented criteria to apply to collection decision making process are shared. These include guidelines for purchasing textbooks.	2.1a 2.2a 2.2c
19. Expand awareness and adoption of services related to PDXScholar, SelectedWorks, hosting journals and conferences, and managing data sets.	2.1e 2.2b 2.4d 3.2b
Indicators of Success: Contacted four departments. Published two new journals and hosted two new conferences. Datasets were added to PDXScholar. The number of SelectedWorks profiles increased by 20%. One new primary resource collection added to PDXScholar. The number of departments linking to PDXScholar increased by 15%.	
20. Increase awareness and use of digital humanities platforms of Special Collections.	2.4b
Indicators of success: Online tutorial for effective use of Digital Gallery created and available online; Special Collections staff fully trained on new version of Omeka; introduction to creating digital exhibits in Omeka Brown Bag session presented to Library staff and faculty.	
21. Work with Open Textbook Library to contribute current textbooks.	2.2b
Indicators of Success: Contributed four PSU open textbooks to the Open Textbook Library.	

22. More effectively promote our instructional services and resources. 2.2b
2.3b
Indicators of success: Improvements made to the instructional services page. Increased understanding of the relationship between library instruction and undergraduate Campus-wide Learning Outcomes and/or other disciplinary learning outcomes by departmental faculty and other units on campus. Increased communication with adjunct faculty about library services and privileges. 2.3c
2.3d
23. Develop a plan to offer instruction and orientation to Special Collections with faculty in targeted subject areas. 2.2b
2.3d
4.2c
Indicators of success: Completed plan ready for implementation.
24. Determine the relevant metrics for measuring the impact of library integration into online courses. 2.3
Indicators of success: We have determined what needs to be counted re: online instruction and found out how the LIS profession is quantifying online instruction. A list of metrics for online instruction at PSU library has been proposed.
25. Promote best practices for the development, maintenance, and delivery of learning objects; assess existing tutorials; and explore options for increased access to learning objects. 2.3a
1.3c
3.3a
6.3a
6.3c
Indicators of success: Enhancement of Library Instruction Services page. Assessment of the revised tutorials created for University Studies. Identification of point-of-need locations that should include links to or embed relevant tutorials. Evaluation of techniques to promote and make accessible library instructional videos.
26. Create general guidance documents, toolkits, etc. for use by Library faculty and staff in assisting teaching faculty and others in online course development. 2.3a
2.3b
2.3d
3.3a
4.1b
Indicators of success: Process for creating toolkits and documentation begun. Library documentation for online courses underway. The library was an active participant in the flexible degrees program.

Goal 3: Develop our virtual spaces to facilitate use and discovery of library resources and services by a wide range of users.

Objective 3.1: Create a more cohesive user experience.

Action 3.1a: Create tools and pathways to provide streamlined integration of library resources and services.

Action 3.1b: Improve the usability of the Library's virtual presence.

Action 3.1c: Develop a set of tools for assessing all library systems, including both qualitative and quantitative approaches.

Action 3.1d: Integrate the Library's virtual presence into campus systems.

Action 3.1e: Develop and implement strategies for improved accessibility, including Web Content Accessibility Guidelines.

Objective 3.2: Increase awareness and recognition of the Library's virtual presence.

Action 3.2a: Strengthen virtual library branding.

Action 3.2b: Promote virtual library services and resources.

Objective 3.3: Develop online instructional services and materials to better serve learners.

Action 3.3a: Maintain and increase the quality and relevance of library online learning objects.

Annual Actions (2015-2016)	Strategic Plan Reference
<p>27. Evaluate opportunities for incorporating additional content sources, e.g., Alliance shared content and additional PDXScholar content, into the Library catalog.</p> <p>Indicators of Success: Opportunities for additional content identified, discussions held on the feasibility and utility of each, and decisions made on whether to pursue integration.</p>	3.1a
<p>28. Develop a disaster recovery plan for the Library's virtual systems and services.</p> <p>Indicators of Success: Plan developed and "Hotsite" website implemented.</p>	3
<p>29. Evaluate Shibboleth for the Library's single-sign-on solution and make an implementation decision.</p> <p>Indicators of Success: Decision made on whether to implement Shibboleth for the Library and an implementation plan mapped out (or not) based on this.</p>	3.1a 3.1e

30. Develop the technical infrastructure and workflows for collecting and reporting on Library metrics across systems and units. 3.1c

Indicators of Success: The technical infrastructure and workflows for collecting Library data and making it accessible is in place and a basic reporting dashboard has been created.

31. Create an annual calendar that maps out a timeline for conducting website assessment including usability testing, and identifying and implementing changes. Conduct usability testing on the Library website and implement a set of regularly used assessment tools for the Library website and related services. 3.1b

Indicators of Success: A calendar mapping out the above has been completed and is built into the Library's planning for FY17. A set of recommended assessment tools determined. At least one usability test completed.

32. Support the usability testing and redesign the Primo interface including updating tutorials, guides and other instructional resources as needed. 3.1b
3.3a

Indicators of success: Successful redesign/summer launch. Successful updating of tutorials, guides, and other instructional resources to reflect updated interface.

33. Conduct an accessibility evaluation of the Library website and recommend and implement changes based on this. 3.1e

Indicators of Success: Accessibility evaluation has been completed, recommendations made and implemented.

34. Continue to extend the Library's web-based design and branding to the Library's web-based services. 3.2a

Indicators of Success: Additional Library services, both externally and locally hosted, have been identified and redesigned to include the Library's design and branding.

35. Review Library website to determine opportunities for development and integration of Special Collections resources and learning objects. 3.1a

Indicators of Success: Completed review of website and outlined recommendations.

36. Work with campus partners to explore opportunities to build a Library presence into the e-portfolio product PebblePad. 3.1d

Indicators of Success: Opportunities for integration with PebblePad identified and implementation plan mapped out.

Goal 4: Develop and build strategic collaborations which positively impact the University, the Library, and the Portland community.

Objective 4.1: Ensure timely inclusion of the Library in relevant initiatives.

Action 4.1a: Create an inventory of current collaborators to identify gaps.

Action 4.1b: Strengthen connections in order to expand opportunities for the Library's inclusion.

Objective 4.2: Strengthen relationships within PSU to have a broader and more diverse campus presence.

Action 4.2a: Enhance relationships with the PSU Foundation and the PSU Alumni Association.

Action 4.2b: Collaborate with University units having a public service role.

Action 4.2c: Work with campus offices, centers, programs, and student groups that represent and serve historically underrepresented and underserved students.

Objective 4.3: Strengthen and diversify relationships with affiliated communities and organizations.

Action 4.3a: Seek opportunities with the Orbis Cascade Alliance and other regional library partners and organizations.

Action 4.3b: Develop and implement a plan for effective and sustainable community engagement and service that includes identifying and inventorying collaborations.

Action 4.3c: Increase engagement with the community through the strategic growth of special collections that are relevant to Portland, including its underserved communities.

Objective 4.4: Improve communication with key audiences and stakeholders to increase awareness and understanding of the Library's role.

Action 4.4a: Create, implement, and evaluate a robust communication plan.

Action 4.4b: Increase awareness and understanding of the Library's role as the provider of information resources, library technologies, and services for University-wide use.

Objective 4.5: Develop strategic partnerships to support sound fiscal stewardship.

Action 4.5a: Maintain current funding levels.

Action 4.5b: Seek additional funding through multiple avenues.

<i>Annual Actions (2015-2016)</i>	<i>Strategic Plan Reference</i>
37. Create an inventory of current collaborators, both within PSU and in our community, to identify gaps.	4.1a 4.3b
Indicators of Success: Inventory created, gaps identified, and key Library contacts identified.	
38. Participate in and implement Alliance initiatives.	4.3a 1.3
Indicators of Success: Work with Alliance librarians to educate Alliance members. Actively participate in Alliance activities including those associated with OER and shared content.	
39. Foster relationships with at least three student-focused campus offices, centers, programs, and groups including those that support historically underrepresented and underserved students, international students, veterans, and others. Work with them to provide Library outreach to their constituents.	4.2c
Indicators of Success: Connections established and/or continued. Plans for further collaboration and services developed.	
40. Explore models of engaging campus stakeholders with OER text and issues; increase communication, collaboration, and advocacy of OER initiatives across campus.	4.3a
Indicator of Success: Communication plan developed and implemented for engaging the campus.	
41. Building on existing communications timeline, develop and share integrated communication plan, including indicators of success.	4.4
Indicators of Success: Plan is completed and shared widely within the Library.	
42. Develop best practices checklists for stewardship of Special Collections community partners.	4.3b
Indicators of Success: Checklists developed and shared. Implementation planning started.	

43. Revise the Development section of the Library website. 4.4
4.5b

Indicators of Success: Pages revised.

44. Attain or make significant progress towards Library FY16 Development Goals for funding and Library metrics. 4.5b

Indicators of Success: Met development metrics for both Library and Dean.

45. Create proposals to identify and seek outside funding in support of Special Collections projects and to create a Library innovation lab. 4.5b

Indicators of Success: Submit application for at least 1 government or foundation-funded grant for special collections. Develop a proposal to support an innovation lab featuring video/audio production life cycle, electronic poster creation, 3D printing and scanning, and others.

Goal 5: Create a library space that is welcoming to all and uniquely focused on academic uses and support.

Objective 5.1: Evaluate and adjust the balance between user spaces and collection spaces.

Action 5.1a: Conduct use and condition studies of the physical collection.

Action 5.1b: Optimize the physical space devoted to collections, including off-site locations.

Objective 5.2: Evaluate and improve the experience of the building environment for all users.

Action 5.2a: Explore furniture options that are comfortable, sustainable, modular, and accessible.

Action 5.2b: Conduct a study of physical space use and user experiences.

Action 5.2c: Consider the Library's relationship to and impact on other student spaces.

Action 5.2d: Create a safer library environment and be better prepared for potential emergencies.

Action 5.2e: Assess and enhance the space to ensure we are meeting the needs of diverse students and groups.

Action 5.2f: Prioritize physical maintenance and conditions of the building.

Action 5.2g: Advocate for and develop long-term renovation plans and capital improvements.

Objective 5.3: Develop plans for the building that accommodate changing technological trends.

Action 5.3a: Anticipate technology trends and be prepared to support students with spaces for technology exploration.

Action 5.3b: Explore collaboration opportunities with campus units such as Office of Information Technology and the Office of Academic Innovation.

	Strategic Plan Reference
Annual Actions (2015-2016)	
46. Initiate a project comparing bound print journal holdings with JSTOR-access and WEST-held journal titles and title runs for retention consideration.	5.1 5.1b
Indicators of Success: Project guidelines defined. Print holdings analyzed. Retention decisions applied.	
47. Plan and implement a major collection shifting project at the Annex to make use of the top shelves.	5.1b
Indicators of Success: Plan developed. Resources allocated and shifting started summer 2016.	

48. Complete survey of Special Collections storage spaces to support optimal use. 5.1b

Indicators of Success: Location map of all holdings updated; accurate count of available storage space by the linear foot obtained.

49. Assess and prioritize building improvements. 5.2f

Indicators of Success: Assessment and prioritization completed. Improvements completed as feasible.

50. Convert 3rd floor restrooms to gender-neutral restrooms. 5.2f

Indicators of Success: Plans developed. Conversion completed.

Goal 6: Build a collaborative and flexible organization with a shared purpose reflective of our values and positioned to meet opportunities and challenges.

Objective 6.1: Develop an effective organization that allows us to take advantage of opportunities and respond to challenges.

Action 6.1a: Evaluate existing organizational structure and consider other structures that may help us meet challenges and opportunities.

Action 6.1b: Develop transparent, flexible, and proactive decision-making practices.

Action 6.1c: Assess library workloads.

Action 6.1d: Foster strong working relationships among areas in the Library.

Objective 6.2: Create a vital and effective organization by fostering respect, trust, collaboration, teamwork, and better communication.

Action 6.2a: Assess and improve the organizational climate.

Action 6.2b: Nurture a sense of shared community.

Action 6.2c: Support work-life balance.

Action 6.2d: Provide a safe and supportive environment that encourages innovative thinking and creative risk-taking at all levels.

Action 6.2e: Modify the physical environment to foster better communication and collaboration.

Action 6.2f: Identify successes and recognize achievements.

Objective 6.3: Provide career development and training at all levels to build skills and knowledge.

Action 6.3a: Identify needed skills, knowledge, and learning opportunities.

Action 6.3b: Create and implement a library-wide plan for career development and training.

Action 6.3c: Provide the support necessary for each person to be successful in their position.

Actions for 2015-16

**Strategic
Plan
Reference**

51. Form a library-wide inclusive group to identify and evaluate possible changes, large and small, in library organizational structure.

6.1a

Indicators of Success: Options and evaluations provided in a report and presented at All Library meetings.

52. Assess existing and proposed committee/group/task forces and recommend and implement changes to improve efficiency and ensure current needs are addressed. 6.1

Indicators of success: Assessment completed. Changes recommended and implemented. Groups formed, retired, and revised as needed. Naming terminology standardized.

53. Establish an on-going series of training and workshops to support organizational development. 6.1d
6.2

Indicators of Success: Provided six or more workshops/training. Improved working relationships.

54. Develop a framework for evaluating Library services and reaching decisions on whether to continue, expand, or discontinue them. Use the existing list of services from the strategic pre-planning discussions to make initial progress on evaluating services. 6.1a
6.1b
6.1c

Indicators of Success: A framework for evaluating and reaching decisions regarding Library services developed; a list of Library services to evaluate created; and initial progress made on the list of services generated during the strategic pre-planning discussions.

55. Implement and assess communication practices that improve the efficiency and effectiveness of sharing information. 6.1a
6.2

Indicators of Success: Assessment of communication practices indicates improved efficiency and effectiveness.

56. Reconfigure Special Collections office to improve communication and efficiency. 6.2e

Indicators of Success: New layout in place for individual work space, shared work space, and storage.

57. Build skills, train, and cross-train staff to ensure depth of understanding and shared responsibility for essential services and activities. 6.3

Indicators of Success: Essential services can be accomplished by multiple persons. List of shared information needs created. Training opportunities are available. National, regional, and local standards are followed and best practices are implemented. Core technology competencies are developed for the 2nd floor technology support desk.

58. Form a group to create and implement a library-wide plan for career development and training including areas such as emergency and earthquake preparedness. 6.3b
6.3a
6.3c

Indicators of Success: Group is formed and a library-wide plan is developed that includes measures for evaluating success and activities for FY16.

59. Support library research and scholarship. 6.3c

Indicators of success: Support given for presentations at conferences, workshops, etc.

60. Further develop the Library Wellness Committee and support their efforts. 6.2

Indicators of Success: Committee established. Committee facilitated wellness activities throughout FY16.