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# STRATEGIC PLAN

## Introduction

In the Spring of 1999, the University of British Columbia Library embarked on a strategic planning process aimed at guiding the Library and its staff through the first decade of the 21<sup>st</sup> century. Among the objectives were to develop a vision of the Library as it would be at the end of that decade, to develop the Library's mission statement, to identify the Library's organizational values, and to establish some specific goals that would be attained within the first third of the decade.

The University Librarian's Advisory Council (ULAC), consisting of the Library's senior administrators and branch/division heads, has been primarily responsible for the development of this plan, but at each stage of the process, there has been solicitation of input and reaction from all Library staff through open staff meetings and via e-mail. As well, the components of this plan have been made available to staff for comment on the Library's staff web page. In addition, a user survey, supplemented by a series of focus groups, questioned UBC students, faculty, and staff about their current and future information needs, and how the Library might best respond to these.

The Library's planning process has not occurred in isolation, but is closely interwoven with and responsive to other academic planning initiatives that have been undertaken by the University – *TREK 2000*, the *Academic Plan*, and *Research Turns On Knowledge*. In *TREK 2000*, the University has made the following vision and goal statements:

*The University of British Columbia, aspiring to be Canada's best university will provide students with an outstanding and distinctive education, and conduct leading research to serve the people of British Columbia, Canada, and the world.*

*The University of British Columbia will provide its students, faculty, and staff with the best possible resources and conditions for learning and research, and create a working environment dedicated to excellence, equity, and mutual respect. It will cooperate with government, business, and industry, as well as with other educational institutions and the general community, to create new knowledge, prepare its students for fulfilling careers, and improve the quality of life through leading-edge research. The graduates of UBC will have developed strong analytical, problem-solving and critical thinking abilities; they will have excellent research and communication skills;*

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*they will be knowledgeable, flexible, and innovative. They will recognize the importance of understanding societies other than their own. As responsible citizens, the graduates of UBC will value diversity, work with and for their communities, and be agents for positive change.*

The UBC Library's plan is specifically related to these statements, for the Library is essential to the University's attainment of its academic vision and goals.

# Vision

*The UBC Library will be a provincial, national and international leader in the development, provision and delivery of outstanding information resources and services that are essential to learning, research and the creation of knowledge at UBC and beyond.*

## WHAT OUR VISION MEANS

- ◆ “*UBC Library*” – Canada’s second largest academic research library, serving UBC students and faculty from thirteen specialized on and off campus divisions and branches, open to the general public, and supplementing the resources of other academic, public, and institutional libraries within British Columbia.
- ◆ “*a provincial, national and international leader*” – we envision a role for ourselves which matches that which the University has set for itself. We aim for excellence and innovation in what we do, and intend to be a model for others; however since our vision of the Library is governed by the availability of resources, staff, and support we must be selective. Not every opportunity can or should be pursued.
- ◆ “*development, provision and delivery*” – we see ourselves as collectors and distributors of information, and as collaborators, working interactively with our students and faculty to identify their information needs and to create the information resources and services that they need in order to accomplish their learning and research objectives.
- ◆ “*outstanding information resources and services*” – our information resources include our own collections of print, electronic, and other resources as well as access to and delivery of such resources from institutions and information providers around the world. Our services include the management, organization, and interpretation of these resources, as well as teaching and assisting our users to make the best possible use of them.
- ◆ “*essential to learning, research and the creation of knowledge*” – we see the development of our resources and services as closely linked to the University’s academic priorities and goals, and to the learning and research needs of UBC’s students and faculty.

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- ◆ “*at UBC and beyond*” – in keeping with the University’s vision and our own commitment to the open sharing of information, we make our resources available to the world community of learners and researchers. At all times, we are mindful that our first priority is to fulfill the information needs of UBC students and faculty, and that open access may be limited by copyright or licensing restrictions.

# Mission

The University is committed to the discovery, expression, preservation, and dissemination of knowledge and the enhancement of understanding. The Library is an active and integral partner with students, faculty, and staff in these endeavours. Its staff develops, organizes, and manages the infrastructure, services, and access to knowledge, ideas, and information that are critical in a University dedicated to distinctive learning, outstanding teaching, and leading-edge research. The Library serves and collaborates with a large and diverse community: first, the students, faculty, and staff of UBC, and, as resources permit, individuals and institutions throughout British Columbia, Canada, and the rest of the world.

## IN PURSUIT OF ITS VISION, THE LIBRARY WILL:

- ◆ Collaborate with faculty in stimulating in students a life-long interest in learning.
- ◆ Assist students to develop the information-seeking and critical thinking skills required to succeed in a knowledge-intensive society.
- ◆ Work with students, faculty, staff, and researchers to find, develop, and effectively use the information resources they require for the creation and transmission of knowledge.
- ◆ Recruit and retain outstanding Library staff, equipping them with the skills and training they need to succeed in their work, and providing them with an attractive environment where good work is acknowledged and rewarded.
- ◆ Build, provide access to, and work to ensure the continued existence of outstanding and comprehensive print, electronic, and other information resources for the students, faculty, and staff of today and tomorrow.
- ◆ Provide expert advice and responsive assistance to its community of users in accordance with its service policy.
- ◆ Maintain a comprehensive and effective infrastructure, including physical facilities and information technology, which enhances learning and research.
- ◆ Partner with government, business, and industry in areas of mutual benefit.
- ◆ Co-operate with other educational institutions and the general community.

# Values

These statements about the Library's values guide us as we implement the Library's mission and vision.

## **WE VALUE INTELLECTUAL FREEDOM**

*Therefore...*

- ◆ we advocate freedom of information and open communication
- ◆ we are committed to academic freedom
- ◆ we respect intellectual property rights
- ◆ we develop and provide access to knowledge, information, and ideas
- ◆ we foster and support learning, teaching, and research

## **WE VALUE SERVICE EXCELLENCE**

*Therefore...*

- ◆ we are focused on our users
- ◆ we provide expert assistance and instruction
- ◆ we make effective and efficient use of our resources
- ◆ we emphasize accuracy and timeliness
- ◆ we promote continuing staff development and growth
- ◆ we recognize good performance

## **WE VALUE INNOVATION**

*Therefore...*

- ◆ we encourage creativity, initiative, and perseverance
- ◆ we are willing to take risks and demonstrate leadership
- ◆ we learn from the best practices of others
- ◆ we anticipate and plan for the changing information needs of our users
- ◆ we recognize the need for continuing review, renewal, and training
- ◆ we promote organizational flexibility

## **WE VALUE COLLABORATION**

*Therefore...*

- ◆ we work closely with students, faculty, and staff
- ◆ we foster collegiality and cooperation among our staff
- ◆ we build relations with other University departments and faculties
- ◆ we cooperate with other libraries and educational institutions
- ◆ we partner with government agencies and business

## **WE VALUE OUR COMMUNITY**

*Therefore...*

- ◆ we value diversity and equity
- ◆ we advocate tolerance, mutual respect, and ethical behavior
- ◆ we are a resource for the community beyond UBC
- ◆ we are accountable to our stakeholders

## **WE VALUE THE WELL-BEING OF OUR USERS AND STAFF**

*Therefore...*

- ◆ we strive to maintain safe, clean, and ergonomically sound facilities for our users and staff
- ◆ we work to facilitate physical access to our units
- ◆ we work with other campus units to ensure the personal security of our users and staff
- ◆ we support a fair and equitable distribution of work
- ◆ we foster camaraderie and strive for a high esprit-de-corps

# Principles, Goals, and Strategies

While the vision and mission statements have a long-term perspective, the Library's goals and strategies have a more immediate focus. The rapid pace of change that is affecting universities in general and academic libraries in particular makes it more realistic to adopt a rolling three-year planning cycle for such specific objectives, enabling the Library to respond flexibly to new developments and opportunities as they arise.

The UBC Library's principles, goals, and strategies are focused on three major aspects – People, Learning and Research, and Community and Internationalization – which incorporate those identified in *TREK 2000*. For each of these, the University's principle statements are followed by those of the Library, and then by the Library's goals and strategies.

## **PEOPLE**

### **TREK 2000**

The University of British Columbia recognizes that people are its most important resource, and places the highest value on its students, faculty, and staff. UBC is committed to providing access to academically qualified students regardless of financial ability, and to employing outstanding faculty and staff. UBC seeks an equitable environment that celebrates diversity, respects difference, and ensures that all may achieve their highest potential.

### **LIBRARY**

The UBC Library recognizes that its staff – librarians, management & professional staff, support staff, and student staff – are its most important resource in supporting the research and learning needs of the UBC community. The Library is committed to attracting and retaining excellent staff at all levels, and to providing them with the training and development they need to fulfil their responsibilities. It is also committed to providing for its users the physical facilities conducive to an effective learning and study environment and to maintaining and upgrading these. Through a series of faculty and departmental advisory committees, through periodic surveys, and through an online feedback system, the Library listens and responds to the concerns of its users – the students, faculty, and staff of UBC.

### **BY YEAR END 2003, THE UBC LIBRARY WILL:**

#### **P 1. RETAIN AND DEVELOP OUTSTANDING STAFF AND IMPROVE RECRUITMENT**

During the next three years and the years following, a large number of our experienced librarians and senior support staff will retire. We need to develop and implement staff retention, succession, and recruitment plans to ensure that we can provide the services our users need in an efficient and effective manner. We need to provide resources for staff training and development to enable our staff to keep up with new developments. We need to work with the University to ensure that we can attract and retain outstanding staff at all levels by providing competitive salaries and benefits. We need to identify and work to obtain the additional staff resources that will be required to accomplish the priorities of the *Academic Plan*.

#### **P 2. IMPROVE COMMUNICATION WITH STAFF AND USERS**

We need to develop and implement a communication plan that will ensure timely two-way communication with both Library staff and users. We need to solicit advice about our services from Library staff and users, keep them informed about new developments and plans, and provide a variety of mechanisms for easy feedback. Through

constant monitoring of user feedback, we will be able to plan in advance to meet emerging needs for new services and deal with changing priorities.

**P 3. DEVELOP AND IMPLEMENT AN ORGANIZATIONAL PLAN TO REFLECT SERVICE PRIORITIES**

Our services are driven by user needs and the University's academic priorities as articulated by the *Academic Plan* and individual academic unit plans. We need to design our organizational structure and deploy our resources to ensure that our services facilitate the attainment of those priorities.

**P 4. IMPROVE EXISTING SPACE, AND PLAN FOR NEW SPACE**

We need to make the best use of our available facilities through reorganization and the use of compact storage. We need to upgrade current facilities to ensure that our users and staff can work in a safe and healthy environment, that we can support the technological infrastructure they need to support their learning and research, and that our collections are housed under conditions that contribute to their preservation. We need to secure commitment for new space to house the ever-growing print collection as well as space for the Library's special collections, study labs, instruction rooms, and equipment our users need to make use of the increasing number of electronic resources. We need to pay particular attention to the creation of space for a Learning Commons, a facility that supports the interaction of Library users and staff, the exchange of information, and the development of ideas, and provides social space where students may study in pleasant surroundings. Finally, we need to ensure that our physical facilities and equipment are well-maintained.

## LEARNING AND RESEARCH

### TREK 2000

The University of British Columbia is committed to maintaining the highest standards of teaching, learning, research, and service, in order to provide a learning environment that will inspire and enable individuals to grow intellectually, recognize their social responsibilities, be prepared to live and work in a global environment, and achieve personal fulfillment.

The University of British Columbia encourages original research and scholarship to increase knowledge and understanding for the benefit of society. In pursuit of this goal, the University adheres to the highest ethical standards and upholds the academic freedom of all members of the University to engage in open inquiry and public discourse in an atmosphere of mutual respect.

### LIBRARY

The UBC Library is committed to supporting the learning and research needs of undergraduate students, graduate students, faculty, and staff. It does so through the acquisition, provision, and preservation of information resources locally, in print, electronic, and other formats, and through access to information resources beyond the campus. It provides instruction and training (e.g. individual, group, Web-based) to help students develop the information-seeking and critical thinking skills required to succeed in their studies and as members of a knowledge-intensive society. It works with faculty, students, and staff to find, develop, and effectively use the information resources they require for the creation and transmission of knowledge. In addition, the Library provides the infrastructure and technology to support and deliver information resources, it provides bibliographic access to and information about them through its online catalogue and other indexes, and it manages the physical flow of resources to and from Library users, whether on campus or at a distance.

### BY YEAR END 2003, THE UBC LIBRARY WILL:

#### L & R 1. INTEGRATE INFORMATION LITERACY INTO THE CURRICULUM LIBRARY-WIDE

We need to enhance our teaching and instructional role to ensure that students obtain the necessary skills and training to function effectively in a society increasingly dependent on information technology and make the most effective use of the world's information resources. While continuing with traditional methods of one-on-one and group instruction, we need to increase the availability of self-instruction, especially through online methods. We also need to work closely with faculty to develop programs for specific courses or groups of students.

**L & R 2. IMPROVE AND EXPAND ACCESS TO COLLECTIONS AND INFORMATION RESOURCES**

A top priority will be to complete the retrospective conversion of the card catalogue so that access to all the Library's catalogued resources will be available electronically to the Library's users around the clock and wherever they may be located. A number of initiatives will help to ensure that users obtain access to the information resources they need with a minimum of delay, whether they are on or off campus. These include: more public workstations, reductions in processing backlogs, fast and accurate reshelving of circulating materials, an electronic course reserve system, and convenient and responsive interlibrary loan/document delivery and distance education services.

**L & R 3. MAINTAIN, DEVELOP, AND PRESERVE PRINT, ELECTRONIC, AND OTHER COLLECTIONS TO REFLECT ACADEMIC AND RESEARCH NEEDS**

Our collection development processes need to be responsive to the needs of individual academic units. Our collection policies need to be clearly articulated, but also flexible, for as academic priorities shift, so too will our priorities for the allocation of collections funding. We need to develop and maintain close liaison between faculty in academic units and Library collections staff. We need to be especially mindful of the collections requirements and funding sources for new initiatives, such as the Canada Foundation for Innovation, the 21<sup>st</sup> Century Research Chairs, etc.

**L & R 4. SUPPORT AND ENHANCE LEARNING AND RESEARCH THROUGH COLLABORATION WITH CAMPUS PARTNERS**

Collaboration with faculties and departments such as the Faculty of Commerce and Business Administration and IT Services has enabled us to enhance our resources and services while making the best possible use of available funding. We need to actively pursue partnerships to create facilities, such as a Learning Commons, to obtain access to specialized electronic resources without expensive duplication, and to provide an integrated range of services at locations most convenient to our users.

**L & R 5. DEVELOP A THREE-YEAR FUNDING PLAN FOR COLLECTIONS, TECHNOLOGY, SERVICES, AND SPACE**

We need to identify the effects that the University's new academic priorities will have on funding needs for collections, technology, services, and space. We need to determine realistic budgets for ongoing support in each of these areas, set priorities, and secure commitments for funding, whether operating or capital, by clearly linking our needs to academic programs.

## COMMUNITY AND INTERNATIONALIZATION

### TREK 2000

The University of British Columbia is dedicated to furthering the social, cultural, and economic interests of Greater Vancouver, British Columbia, and Canada. To this end, it will cooperate with other educational institutions, as well as with industries, governments, and agencies to advance learning and research and further the transfer of knowledge. The University also recognizes that it must be accountable to those who use our services, participate in our processes, share in our governance, and provide our revenues.

The University of British Columbia is part of a network of learning that stretches around the world, and in an increasingly global environment it encourages the development of teaching, learning, and research intended to strengthen British Columbia's and Canada's links to other nations.

### LIBRARY

The UBC Library is firmly committed to cooperating with other academic libraries and institutions, government, and industry in order to support learning and research and to further the transfer and preservation of knowledge. As a community resource, it plays a key role in the intellectual, social, cultural, and economic growth of the Vancouver region and British Columbia. It is now part of a network of information resources that extends around the world, and which strengthens British Columbia's and Canada's links to the international community.

### BY YEAR END 2003, THE UBC LIBRARY WILL:

**C & I 1. OBTAIN LIBRARY SUPPORT FROM PROVINCIAL, FEDERAL, AND INTERNATIONAL INITIATIVES, e.g. BC Knowledge Development Fund, Canada Foundation for Innovation, 21<sup>st</sup> Century Research Chairs, Canadian International Development Agency, etc.**

New academic programs, courses, and research that result from new funding initiatives require additional funding for specialized and expensive information resources, Library staff with particular subject and language skills, or new Library facilities and equipment. While some funding has already been designated for access to information resources through CFI, the Library, together with other academic libraries, needs to lobby to ensure that it receives support for such 'infrastructure' costs from government, granting agencies, or the University.

**C & I 2. PARTICIPATE AND TAKE A LEADERSHIP ROLE IN APPROPRIATE AND RELEVANT CONSORTIA**

To ensure that we make the most cost-effective use of our funding, we need to collaborate with other academic institutions to share the cost of access to electronic resources and to cooperate in the development of print collections. The UBC Library, because of its size and the expertise and global professional relationships of its staff, can be a leader in creating such partnerships, negotiating licensing agreements with vendors, and developing the necessary technological infrastructure and interfaces.

**C & I 3. STRENGTHEN RELATIONSHIPS WITH ALUMNI, FRIENDS, AND VENDORS**

Financial support from alumni, friends, and corporate donors is vital to the fulfillment of our vision and the accomplishment of our mission. We need to strengthen existing relationships and actively build new ones, making use of contacts developed by our staff and linking our needs with the interests of donors. We need to work closely with our major vendors to negotiate cost-effective contracts as well as to develop them as a source of charitable support for Library initiatives. We also need to ensure the prompt and appropriate recognition of all donor support.

**C & I 4. DEVELOP A PLAN TO PROVIDE SUPPORT TO AND RECEIVE SUPPORT FROM OUR PROVINCIAL, NATIONAL, AND INTERNATIONAL USER COMMUNITIES**

The University has emphasized outreach to the community and this has implications for the Library. We need to determine the levels of access and assistance we can provide to our different user communities and the funding required, for our resources are finite and we must give priority to the needs of UBC students and faculty. However, to meet the information needs of our own users, we depend on the resources of others, and in return, we need to make our resources available to them. To facilitate this exchange and in keeping with our belief in open access to information, we need to provide as much access as is possible to our resources, and negotiate cost-effective licensing agreements with minimal access restrictions.

## Next Steps

Today, no academic library can hope to provide from its own collection, whether print, electronic, or other format, everything that its users may demand. Limited funds for collections, access to electronic resources, facilities, and staff mean that libraries must partner with other institutions to share the world's information resources and to meet the ever growing information needs of each academic library's individual users, whether students or faculty. The UBC Library is no exception.

While the past few decades have often been challenging for academic libraries, the UBC Library has been fortunate nevertheless to have been able to build strong collections in specific areas, to employ a well-qualified and motivated staff whose services and assistance have garnered high praise from users, to introduce new technology, and to expand and renovate its physical facilities. We have not been able to do as much as we would have liked, but we have made the best possible use we could of our resources.

The UBC Library has enjoyed the continuing support of the University and its primary users, the students and faculty of UBC, and we look forward to this support in the future, for it is essential to the fulfillment of our vision and the attainment of our goals. We are also heartened by renewed federal government attention to research and post-secondary education, activities to which the Library is integral. New funding initiatives such as the Canada Foundation for Innovation (CFI), the 21<sup>st</sup> Century Research Chairs, and additional support for medical and scientific granting agencies provide a reason for optimism and the potential for an increase in support for both academic library infrastructure as well as information resources.

This plan will guide the Library in setting priorities for the allocation of both existing and new resources during the next three years. It will form the framework for individual branch and divisional plans, and, through encouraging reflection and a careful consideration of the implications of new programs and services, will contribute to organizational flexibility.

No plan can anticipate the future in detail nor provide for all unexpected developments. The Library needs to be ready to deal with new and unexpected opportunities when these arise. The plan is flexible enough to accommodate new possibilities, but it will also serve as a guide to ensure that those that are pursued are congruent with University and Library priorities.

Some of the Library's current programs and activities already reflect the priorities identified in this plan. We will continue to support these strengths, but will review them all in detail. For each of the goals identified in this plan, UBC Library staff will develop specific implementation strategies, including timelines and criteria to measure successful attainment. In addition, we will be counting on feedback from all our user communities, whether on campus or off, to assist us as we proceed with implementation.

*Tuum est!*

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# IMPLEMENTATION PLAN

## Introduction

In the summer of 2000, the UBC Library completed its strategic plan, designed to support the University's academic initiatives outlined in *TREK 2000*, the *Academic Plan*, and other planning documents. In addition to developing vision, mission, and organizational value statements for the Library, the strategic plan sets out specific goals or objectives for accomplishment during the period 2000-2003. Some of these were already reflected in the Library's current programs and activities, but many others represented new priorities.

An Implementation Steering Committee (ISC), consisting of members of the University Librarian's Advisory Council (ULAC), began work on the development of implementation strategies, including the allocation of staff and other resources, timelines, and criteria to measure successful attainment. The ISC determined relative priorities, grouped related objectives into projects, allocated these to individual task groups, set starting and completion dates, and identified significant milestones.

Throughout this process, documents and background materials were made available to Library staff on the staff web page, and staff feedback was solicited. ISC members provided periodic reports to ULAC and the Library Administrative Group, and sought comment. In addition, a series of general staff meetings was held at which staff members provided input on the implementation of objectives and priorities and how proposed projects might affect the ongoing operations of the Library. The feedback obtained was extremely useful and incorporated into the implementation planning process.

The implementation plan that follows consists of 37 projects to accomplish the goals of the Library's strategic plan, and which will be carried out by task groups consisting of librarians and support staff from most of the Library's divisions and branches as well as staff and faculty from other University units. Some of these projects are already in progress, others will not start until 2001 or 2002. Together with its many ongoing activities, these projects will ensure that the UBC Library successfully carries out its mission and attains its vision of being "a provincial, national and international leader in the development, provision and delivery of outstanding information resources and services that are essential to learning, research and the creation of knowledge at UBC and beyond".

## Strategic Plan Objectives

The Library's Implementation Steering Committee, consisting of members of the University Librarian's Advisory Council, and with input from librarians and staff throughout the Library's divisions and branches, has determined that the following objectives are the key goals the Library must accomplish during 2000-2003. In this way, the Library will attain the vision outlined in its strategic plan, and ensure that it continues to enhance its support for learning and research at UBC.

The Library will use a project approach to realize most of these objectives. Of course, these projects do not represent all the activities the Library is undertaking to achieve its vision. While the project approach is suitable for the accomplishment of the majority of strategic plan objectives, others lend themselves to integration into the Library's ongoing services, and will be accomplished in the course of day-to-day operations. The dates following each objective is the timeframe in which each project will be completed. Annual progress reports will be compiled and circulated widely.

A summary Gantt Chart follows the objectives. This chart shows the time-span of each task group's project in graphical form. The projects are grouped into Years 1, 2, and 3, according to their start date, and numbered sequentially within each year, i.e. 1.1, 1.2, etc. For each project, the chart provides the project's number and name (Task Name), the duration in days, and the start and finish dates. The time scale covers the period 2000-2003 divided into quarters.

## PEOPLE

### P 1. RETAIN AND DEVELOP OUTSTANDING STAFF AND IMPROVE RECRUITMENT

#### Objectives

- ◆ Work with UBC Human Resources to resolve CUPE staff pay equity and classification issues (2001).
- ◆ Respond to and act on the results of the Employee Opinion Survey (2001).
- ◆ Develop and implement a Library-wide plan to address known and anticipated staffing and program needs (2002).
- ◆ Develop and implement a plan for Library Human Resources Office management and support (2001).

### P 2. IMPROVE COMMUNICATION WITH STAFF AND USERS

#### Objectives

- ◆ Conduct a review of Library communications and public relations activities and identify those recommendations to be implemented (2002).
- ◆ Develop and implement a plan for communications management and support (2002).
- ◆ Review results from the 1999 User Survey and act on them (2001).
- ◆ Implement regular surveys of users and staff and act on the results (2003).
- ◆ Improve two-way electronic communication with staff and users (e.g. telephone, chat lines, lib-contact e-mail) (2002).
- ◆ Review Library committees, task groups, and processes to ensure effective interunit communications (2002).
- ◆ Increase Library involvement in and visibility at campus activities (2002).

**P 3. DEVELOP AND IMPLEMENT AN ORGANIZATIONAL PLAN TO REFLECT SERVICE PRIORITIES**

**Objectives**

- ◆ Identify and communicate service priorities to support the Strategic Plan (2002).
- ◆ Identify required staffing levels to support the service priorities (2002).
- ◆ Determine and implement statistical measures, standards, and/or benchmarks to ensure service priorities are achieved (2003).
- ◆ Improve the systems and support mechanisms for management and financial control (2003).

**P 4. IMPROVE EXISTING SPACE, AND PLAN FOR NEW SPACE**

**Objectives**

- ◆ Complete planning for a new Library/University Learning Centre (i.e. redevelopment of the Main Library), including a Learning Commons (2001).
- ◆ Optimize use of available Library and University space for storage of collections, including new compact storage (2003).
- ◆ Provide in the short term more learning/social/instructional space in the Library or shared with other University units (2003).
- ◆ Review the Integration Task Group's report on the consolidation of the Woodward and Science & Engineering Libraries and select the options and recommendations to be implemented (2002).
- ◆ Develop and implement a plan for Library Facilities staff support (2003).
- ◆ Conduct a survey and prepare an inventory of safety, facilities and infrastructure needs (space, health and safety, security, physical access to facilities, technology, maintenance levels, equipment maintenance), and recommend improvements (2001).
- ◆ Optimize use of available Library and University space to support Library services and staff (2003).

## LEARNING AND RESEARCH

### L & R 1. INTEGRATE INFORMATION LITERACY INTO THE CURRICULUM LIBRARY-WIDE

#### Objectives

- ◆ Identify user needs and teaching opportunities in each faculty (2003).
- ◆ Assess teaching methodologies and identify staff and resources needed (2003).
- ◆ Work with and obtain support from the AVP/VP Academic, the Associate Deans/Deans, and the VP Students (2003).
- ◆ Implement the most appropriate teaching methodology(ies) and evaluate results (2003).

### L & R 2. IMPROVE AND EXPAND ACCESS TO COLLECTIONS AND INFORMATION RESOURCES

#### Objectives

- ◆ Complete conversion and clean-up of bibliographic database (bibliographic record upgrade, authorities, serials holdings, order records, item records) (2002).
- ◆ Enhance the Library's online presence by improving ease of access to full-text, e.g. increase links, catalogue access, etc. to electronic resources, link database holdings to e-journals/full-text (2003).
- ◆ Develop and implement benchmarks for mediated services, shelving, storage retrieval, ILL/DocDel, etc (2003).
- ◆ Develop benchmarks for the number of workstations and Internet Access Ports and implement an ongoing upgrade and replacement strategy (2003).
- ◆ Determine what specialized software and hardware to acquire and how to support it, e.g. non-Roman language software, personal bibliographic software, scanners (2001).
- ◆ Review general Library software with a focus on current web browsers (Netscape and Internet Explorer) (2001).
- ◆ Implement a comprehensive back-up program for critical equipment and data (2001).

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- ◆ Improve access to and management of the collection, e.g. complete barcoding and tattletaping of materials, including those in storage, inventory the collection, weed the collection, reduce and manage the binding backlog (2003).
- ◆ Review integrated Library automated system options, recommend system upgrade or replacement to the University Librarian, and implement (2003).
- ◆ Conduct a review of user needs and options for reference service, including electronic reference, and identify those recommendations to be implemented (2003).
- ◆ Reduce and manage the cataloguing backlog (2002).
- ◆ Identify and determine cataloguing/listing needs for other Library materials, e.g. materials residing in branches, gray literature (2002).
- ◆ Review loan and access policies for UBC Library collections, and identify those recommendations to be implemented (2002).

### **L & R 3. MAINTAIN, DEVELOP, AND PRESERVE PRINT, ELECTRONIC, AND OTHER COLLECTIONS TO REFLECT ACADEMIC RESEARCH NEEDS**

#### **Objectives**

- ◆ Identify collection strengths and gaps in the context of academic and research needs. Build on strengths and fill gaps (2003).
- ◆ Digitize high use/demand materials, e.g. reserve materials (2003).
- ◆ Revise collection policies, consulting with users (2003).
- ◆ Assess collection retention policies in each discipline in light of transition to electronic formats (2003).
- ◆ Develop a print preservation policy and program (2003).
- ◆ Participate in initiatives to preserve electronic information (2003).
- ◆ Identify unique and rare materials for digitization (2003).
- ◆ Improve the systems and support mechanisms for the management and financial control of the collections budget (2003).

**L & R 4. SUPPORT AND ENHANCE LEARNING AND RESEARCH THROUGH  
COLLABORATION WITH CAMPUS PARTNERS**

**Objectives**

- ◆ Formalize and obtain non-Library budget support (e.g. contracts) for collections, staff, space, and services (e.g. ILL, Distance Education, new branch libraries) (2002).
- ◆ Collaborate with other campus units (e.g. ITServices, Student Services, Faculty of Applied Science) on learning technologies support (e.g. MyUBC, WebCT) (2003).
- ◆ Determine how best to support the University's distributed learning programs (2001).
- ◆ Collaborate with other campus units (e.g. VP Research Office) on major research initiatives (e.g. CFI) (2003).
- ◆ Identify Library coordinators for liaison with research programs/proposals (2003).

**L & R 5. DEVELOP A THREE-YEAR FUNDING PLAN FOR COLLECTIONS,  
TECHNOLOGY, SERVICES, AND SPACE**

**Objectives**

- ◆ Identify funding sources and strategies to obtain \$60 million one-time for the University Learning Centre project (2001).
- ◆ Identify funding sources and strategies and increase the acquisitions budget to \$23 million continuing for collections (2003).
- ◆ Identify funding sources and strategies and increase the technology budget to \$2 million continuing for hardware and software (2002).
- ◆ Determine funding requirements, sources, and strategies for the improvement of current facilities (2003).
- ◆ Determine funding requirements, sources, and strategies for the improvement and development of staffing and services (2002).

## **COMMUNITY AND INTERNATIONALIZATION**

**C & I 1. OBTAIN LIBRARY SUPPORT FROM PROVINCIAL, FEDERAL, AND INTERNATIONAL INITIATIVES, e.g. BC Knowledge Development Fund, Canada Foundation for Innovation, 21<sup>st</sup> Century Research Chairs, Canadian International Development Agency, etc.**

### **Objectives**

- ◆ Establish a Centre for Library Research to study issues such as scholarly communication models and digital archiving in collaboration with faculty and others (2003).
- ◆ Establish a Library component in research funding initiatives, e.g. CFI, CRC, SSHRC (2003).
- ◆ Ensure there is a Library component in the funding provided for endowed chairs (2003).

**C & I 2. PARTICIPATE AND TAKE A LEADERSHIP ROLE IN APPROPRIATE AND RELEVANT CONSORTIA**

### **Objectives**

- ◆ Review current consortial relationships, recognizing the role the UBC Library has played and the benefits to both UBC and other members of the consortia (2002).
- ◆ Develop criteria for UBC Library membership in consortia (2002).
- ◆ Identify future consortial opportunities, benefits, contributions, and leadership roles (2002).

**C & I 3. STRENGTHEN RELATIONSHIPS WITH ALUMNI, FRIENDS, AND VENDORS**

**Objectives**

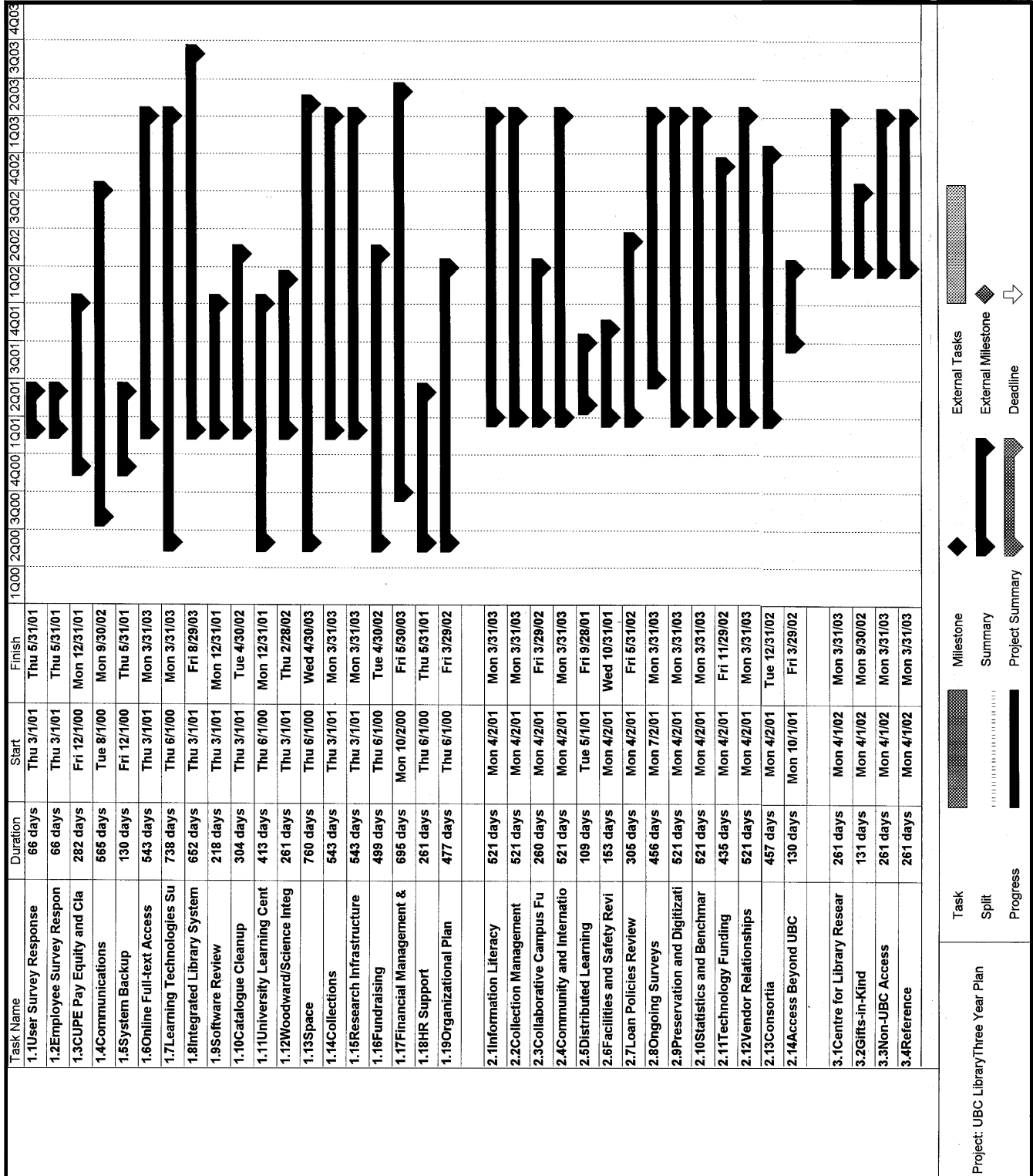
- ◆ Negotiate expanded access to services and resources for Friends, donors, and alumni (2003).
- ◆ Ensure timely recognition of donations (2002).
- ◆ Improve communication with and involvement of Friends, donors, and alumni (2002).
- ◆ Ensure Library needs are included in Faculty fundraising proposals (2002).
- ◆ Obtain more staff support from the Development Office (2002).
- ◆ Develop strategies to increase support from Friends, donors, and alumni (2002).
- ◆ Establish guidelines and support for gifts-in-kind (2002).
- ◆ Seek new opportunities for support from and collaboration with vendors (2003).

**C & I 4. DEVELOP A PLAN TO PROVIDE SUPPORT TO AND RECEIVE SUPPORT FROM OUR PROVINCIAL, NATIONAL, AND INTERNATIONAL USER COMMUNITIES**

**Objectives**

- ◆ Identify provincial, national, and international opportunities, and determine the Library's potential for involvement, e.g. Universitas 21, Ministry of Health, The Learning Exchange, Robson Square (2003).
- ◆ Review barriers that limit access to UBC Library collections and services by our provincial, national, and international user communities, and negotiate improvements (2003).
- ◆ Identify, negotiate, and improve access, particularly unmediated access, to the collections and services of other institutions for the UBC community, e.g. Canada Institute for Scientific and Technical Information, National Library of Medicine, etc. (2002).

SUMMARY GANTT CHART



# APPENDICES

- A ENVIRONMENTAL SCAN
- B SWOT ANALYSIS
- C USER SURVEY EXECUTIVE SUMMARY
- D USER SURVEY
- E FOCUS GROUP REPORT

These appendices are available at:  
<http://www.library.ubc.ca/home/planning.html>

**Furthering Learning and Research:**  
Implementing the UBC Library's Strategic Plan 2000-2003

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The University of British Columbia Library wishes to thank all those who contributed to the production of *Furthering Learning and Research: Implementing the UBC Library's Strategic Plan 2000-2003* by taking the time to offer comments and suggestions in response to the *Draft Strategic Plan* issued in April 2000.

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