Wake Forest University

Z. Smith Reynolds Library

Strategic Plan

May, 2007

People like to share ideas
They write them down
They publish them
They put them online
We, in the Library, take care of these ideas until people are ready for them
And then we help to find and use them

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Executive Summary of ZSR Proposals

Strategy	Description	Funding request	Status as of June 30, 2012
WF Strategic Priority 1: Enhance Faculty Distinction.			
Strategy: 1	Add $1million annually for the acquisition of library materials	$1,000,000 annually	Annual inflation built into budget automatically each year; Increased resources for library materials remains a goal of the capital campaign
Strategy: 2	Build an off-site storage building	$2,500,000 or <1,000,000 one time	Building acquired, fully operational in 2011
Strategy: 3	Establish a Center for Scholarly Communications	$250,000 annually for staff, technology and royalty fees	Scholarly Communications Librarian hired October 2010
WF Strategic Priority 2: Build Academic Programs of Nationally Recognized Excellence.			
Strategy: 4	Digitize collections unique to Wake Forest	$150,000 annually for a permanent digitization staff member and technology	Digital Production Coordinator named; digitization workflow streamlined
Strategy: 5	Expand the Information Literacy program	$50,000 annually for additional instruction librarian	Additional Library instruction classes offered and 200 level courses created. Head of Instruction and Faculty Lecturer added in 2011.
Strategy: 6	Re-think the current decentralized approach to academic computing	unknown	Library and Information Systems, collaborated and moved Help Desk services to library; renamed department "The Bridge"
Strategy: 7	Lead the campus on emerging technology applications	$25,000 annually for technology and staffing	Instructional Design Librarian appointed; blog and wiki services

			established. Library services moved to Amazon cloud in 2009
Strategy: 8	Extend Library reference service to other parts of campus	Covered by internal reallocation of time; no additional funds needed	Outreach Librarian position created; also, other librarians embedded in classrooms
WF Strategic Priority 3: Attract a Talented and Diverse Student Body and Develop Exceptional Young Leaders.			
Strategy: 9	Build a Student Learning/ Crossroads Center	$5 -10,000,000 one-time for Student Learning/ Crossroads Center with library space	College of Arts and Sciences did not move forward with construction of Crossroads center.
Strategy: 10	Renovate the existing Library, both infrastructure and furnishings	$4,210,000 for Five Year Infrastructure Plan $2,000,000 – furnishings; both one-time	Renovated 401 with new carpet and new furniture; Renovated 24hr study rooms, created mezzanine level & added new furniture. Converted space on the 4th floor into an Auditorium and a Media Room (403, 404)
Strategy: 11	Keep ZSR open 24 hours, 5 days a week while classes are in session	Internal reallocation for library staff - $30,000 for additional police coverage annually	Accomplished in February 2008
WF Strategic Priority 4: Create a Richer sense of community throughout the University.			
Strategy: 12	Create a full-service coffee shop	Partner with Aramark	Accomplished in Fall 2008
Strategy: 13	Create a faculty lounge within the Library	$50,000 one-time cost for renovation and furnishings	Deferred - Library Planning Committee did not support this strategy.

Strategy: 14	Create a graduate student lounge in the Library	$50,000 one-time cost for renovation and furnishings	Johnson Room in ZSR refurbished in fall 2008 as the Graduate Student lounge
WF Strategic Priority 5: Strengthen Wake Forest's connections to the communities beyond our campus.			
Strategy: 15	Reduce the fee for external borrower's cards Pursue a reciprocal borrowing agreement with Triad Academic Libraries Association	No cost	Accomplished in Fall 2007
Library Strategic Priorities			
Strategy: 16	Plan for acquisition of a new integrated library system for campus	$500,000 to $1,000,000 for three campus libraries initial and annual costs	Migration to Open Source and VuFind in 2010. Added Discovery Tools (Summon) in 2011.
Strategy: 17	Strengthen library advancement efforts	Defer to Advancement	Director of Development for the Library and Special Projects joined Advancement in Spring 2011
Organizational Development Initiatives			
Strategy: 18	Implement remainder of compensation plan for Library professionals	$235,000 ongoing cost spread over three years	Accomplished in July 2008

Strategy: 19	Investigate and propose a plan for academic status for Wake Forest Librarians	To be determined	Accomplished in July 2009
Strategy: 20	Establish a two year Diversity Residency Program	$100,000 annually to support two resident positions	Funding not yet available
Other Initiatives			
Strategy: 21	The University needs to devise a comprehensive plan for upgrading standard office equipment	Defer to Purchasing	New Copier program put in place, Fall 2009
Strategy: 22	Install a self-checkout machine in the Library	$25,000 one-time	After further investigation, not seen as a high priority

Introduction

The staff of the Z. Smith Reynolds Library (ZSR) is pleased to offer a strategic plan to enhance the mission and intellectual reach of the University. Library staff took President Hatch at his word and dared to be bold, visionary and aspirational in outlook. Implementation of this plan will transform the information landscape for Wake Forest University. Once a library primarily for students, ten years hence ZSR will be a virtual and physical place for both students and scholars, rich in resources and alive with learning.

Methods

This strategic plan is the outcome of a year-long effort by virtually all members of the Z. Smith Reynolds Library staff. The Environmental Scan group (see appendix for list of members) began the work with a data-driven examination of the internal and external environments in which ZSR operates. Local data were available from the 2002, 2004, and 2006 implementations of the national LibQUAL library satisfaction surveys. The Blue Sky group (see appendix) took up where the Environmental Scan left off and imagined what a better ZSR might look like. Both groups presented their findings at regular meetings of the College Committee on Library Planning and to the ZSR staff for feedback. A group of LEAD students also provided feedback on initiatives important to students. A retreat was held on May 3 by the Library's Administrative Council to identify priorities for inclusion.

The inclusive nature of the plan is reflected in the fact that it was maintained on the Library's internal website in a wiki format. Wikis are interactive tools whereby contributors can edit each other's developing text. This took a fair amount of faith and "radical trust" but worked well in the end.

Vision

The Z. Smith Reynolds Library will be the first and favorite source for Wake Forest users in their quest for knowledge.

Mission

The mission of the Z. Smith Reynolds Library is to help our students, faculty and staff succeed. We do this by providing unparalleled service in managing, delivering and teaching the use of scholarly content and information technology.

SWOT Analysis: Strengths, Weaknesses, Opportunities, Threats

Strengths
- Library Resources/Collections
    - Staff are dedicated, well-qualified, and service-oriented
    - Special Collections have pockets of strength
        - Holocaust, Irish poetry, Maya Angelou collections
    - Emphasis on emerging formats
        - Electronic journals
        - Film/Media collections
- Library Space
    - Current spaces are heavily used at peak times
        - 24 hour study rooms
        - Classrooms
        - Group study rooms
        - Atrium study space
        - Wilson wing study space
- Library Services
    - Delivery of books and articles to faculty offices
    - Multiple ways to access services (online, phone, in person)
    - Lib 100 information literacy class accepted and supported by faculty
    - Successful increase in public programming
        - Library Lecture Series
        - Get Game@ZSR
        - Wake the Library
- Library Technology
    - Library benefits from ubiquitous computing environment, including campus wireless network
    - Serves substantial role in technology training for students and faculty
    - Leader in emerging technologies to support the library and academics
- Library Collaboration
    - Close working relationship with Information Systems
    - Strong relationships with faculty through liaisons, instruction, and special projects
    - Close cooperation with Professional Center Library and Coy C. Carpenter Medical Library
    - Library consortia maximize collection development and access to information
        - ASERL, SOLINET, NCICU, Carolina Consortium

Weaknesses
- Library Resources/Collections
    - Overall collection does not meet research needs of a major university
    - Collections to support departments with PhD programs are significantly underdeveloped

- Library Space
  - Lack of adequate classroom, meeting and programming space
  - Lack of private and collaborative student study space; spaces need cleaning, updating and expansion
  - Lack of any designated faculty or graduate student spaces
  - Building infrastructure not functional: heating, cooling, lighting, plumbing
  - Insufficient stack space for library materials
  - Original building design (floor to ceiling support stacks) is now a barrier to effective resource organization
  - Library lacks sufficient number of electrical outlets throughout
  - Outdated and uncomfortable furnishings
  - Lack of clear professional signage
- Library Services
  - Limitation of service levels based on funding restrictions
- Library Technology
  - Aging Integrated Library System (ILS)
- Library Collaboration
  - Lack of full coordination between curriculum and information literacy

Opportunities
- Library Resources/Collections
  - Staff
    - Cross-train and give staff more professional development opportunities to adapt to changing environment
    - Create more diversity among library staff
  - Collections
    - Accelerate movement from print to electronic journal formats
    - Invest in monograph collection
    - Create institutional repository to capture intellectual output of Wake Forest faculty, students and staff
- Library Space
  - Create community spaces such as auditorium for programming, coffee shop, faculty and graduate student lounges
  - Redesign library space to reposition resources and service points
  - Upgrade library building infrastructure and furnishings
  - Build or acquire university-controlled offsite storage space
- Library Services
  - Implement an aggressive marketing plan
  - Develop further synergies and interrelationships with other WFU libraries
  - Increase services to greater number of library patrons
  - Expand services through information commons model implementation
- Library Technology
  - Reinvent the integrated library system
  - Offer a more meaningful interactive web-based experience through the use of emerging Web 2.0 technologies

Threats
- Overall
  - Due to changing definition of libraries and research, unless the library adapts collections/services/roles it may cease to be the intellectual heart of the university
  - A weak library reflects a weak university

- Library Resources/Collections
  - Copyright restrictions are threat to accessing information
  - Lack of funding is a threat to adequacy in collections
  - Lack of stable, perpetual access to electronic resources is threatening to research
  - Out-of-date collections is threat to modern scholarship
  - Poor heating, cooling, humidity, and lighting systems are threatening to fragile library materials
- Library Space
  - Uncomfortable conditions are threat to library usability
- Library Services
  - Emergence of new information environments is threat to status quo; library must be prepared with collections, systems, and services to respond to new information seeking paradigms
- Library Technology
  - Change in ownership of ILS vendor is threat to stable automated systems and could result in degradation of service to users; additional major expense to migrate to new systems
  - Google (Google Scholar, Google Books) is threat to traditional library services and resources, therefore the library must incorporate them and expand upon these tools in library service delivery

University Strategic Priorities

WF Strategic Priority 1: Enhance Faculty Distinction

In 2004-2005, library staff conducted extensive interviews with faculty in each department to assess how well ZSR was meeting their needs. The message could not have been more clear: the Library is strong in undergraduate instructional support but weak in supporting scholarship and graduate programs. Faculty who live the teacher-scholar ideal have had to seek information from other sources to meet their needs. In its own strategic plan, the College lists the Library as a *threat* to faculty research and offers a set of strategies for its remedy. In order to recruit and retain faculty of national distinction, ZSR must have the resources that scholars need for the discovery and creation of new knowledge.

To enhance faculty distinction, we propose the following:

- **Strategy 1**:
Add a minimum of **$1 million annually** for the acquisition of library materials. A 2006 survey of peer academic libraries[1] revealed that ZSR's acquisitions budget was one million dollars less than the median of the peer group. In the past two decades when the inflation rate on books and journals soared into double digits, ZSR's materials budget stayed flat. This seriously eroded the ability of the Library to collect the literature needed across the disciplines. The sciences were particularly affected because of the high cost of journals, which was devastating to the growing doctoral programs of Biology, Chemistry and Physics. Because funds were diverted from monographic purchases to cover the increase in journal subscriptions, the Library's monographic collections suffered. In fact, recent departmental analyses have revealed that ZSR is last or next to last among peers in monographic acquisition for each of the departments surveyed. Faculty will not flourish or stay at a university that cannot provide them with the intellectual capital they need to do their best work. The Library should receive **start-up funds** for each new faculty member who is recruited to the University.

  Estimated cost: $ 1,000,000 annually. Potential capital campaign item to generate $20,000,000 in endowment for $1,000,000 annual income; or potential $125 per-semester student fee.

- **Strategy 2:**

  Build an off-site **Library Storage Building**. Plans for construction of a library storage building have been discussed by the Wake Forest Cabinet since at least 2004. The rationale for the building is overcrowding in the ZSR stacks. A measurement in 2004 revealed the stacks to be approximately 90% filled, with library standards calling 80-86% "full," due to the difficulties in shifting to accommodate unshelved materials. Without the relief of an off-site storage building for lesser-used materials (a very common strategy for research libraries), or a substantial increase in the funds needed for commercial storage (ZSR currently pays $85,000 annually for commercial storage), the longer runs of periodicals and historical monographs that are often needed by scholars will need to be sold or otherwise discarded.

  Estimated cost:

  $2,500,000 for modern, high-density storage building;
  $1,000,000 or less for standard commercial storage building;
  Either option needed before capital campaign is underway.

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[1] University Libraries Group: American, Baylor, Carnegie-Mellon, Catholic, DePaul, Fordham, Lehigh, Loyola, Marquette, Miami (Ohio), Northeastern, St. Johns, St. Louis, Southern Methodist, Texas Christian, Tufts, Denver, Richmond, Villanova, William and Mary, Yeshiva.

- **Strategy 3**:

   Establish a **Center for Scholarly Communications** for the entire Wake Forest campus, including Health Sciences, Law, and Babcock. Due to the unsustainable cost of former models, modern scholarship is being created and disseminated using creative methods on innovative platforms across the disciplines. Open access journals, institutional and subject repositories, and a renewed emphasis on author rights are common ways to address the crisis in scholarly communications. The future of Wake Forest scholarship is dependent on embracing these new models and helping to create change. A new position of **Scholarly Communications Librarian** could reach out to faculty in all fields on both campuses to explore, promote and maximize new models of scholarship. A digital campus-wide **Institutional Repository,** coordinated and supported by all three campus libraries, will be created to collect and preserve the intellectual output of Wake Forest scholars in all disciplines, including theses and dissertations, faculty publications, student honors projects, etc.

   One of the most urgent and practical issues in the scholarly communications arena is Copyright. Wake Forest authors give away the rights to their own scholarship every day to publishers. They then discover that they cannot legally post their own articles on their own websites, distribute copies to peers, or include copies in course packs without permission from publishers. This spring semester, library staff identified two serious violations of copyright on the part of Wake Forest faculty and students that put the University at risk. A new position of **Copyright Officer** could be created to assist faculty in keeping their copyrights as well as securing copyright clearance to facilitate and encourage the use of intellectual property in teaching and research.

   Estimated cost: $250,000 annually for staff, technology and royalty fees

WF Strategic Priority 2: Build Academic Programs of Nationally Recognized Excellence

The Library is central to the academic programs and reputation of the University. It is not possible to have a great university without a great library. In addition to managing a collection of critical information resources, ZSR staff play a strong role in instructional and technology initiatives on campus. The Library currently conducts between nine and eleven sections of its one-credit Information Literacy class, Lib 100: Accessing Information in the 21st Century, each fall and spring semester. Staff in the Library's Information Technology Center (ITC) provide

technology training for all faculty and students on use of laptops and standard applications software.

- **Strategy 4:**

  Digitize collections unique to Wake Forest, including literary manuscripts, Baptist historical records and archives of the University. ZSR is the repository for an array of one-of-a-kind materials. Digitization will allow students, scholars and the public at large to more easily find, research, and assimilate this information. Digital versions of these unique collections encourage collaborative research with distant co-authors and showcase the University by sharing with the world materials that cannot be found anywhere else.

  Through digitization, we join an international movement to provide global access to research materials online for the purpose of teaching, learning and research. Both Google and a similar initiative sponsored by Yahoo and Microsoft called the Open Content Alliance are aggressively seeking to digitize the world's published literature. Issues of copyright, ownership, and access are still unsettled, but the landscape of the print v. digital environment will change dramatically in the ten years covered by this strategic plan. The ZSR strategy is to start first with items unique to Wake Forest while others are digitizing commonly held items. To accomplish this initiative, a robust technology infrastructure and attention to sustainability, scalability and interoperability are required.

  Estimated cost: $150,000 annually for a permanent digitization staff member and technology. Additional staff and costs will be recovered through aggressive grant-seeking (NEH, IMLS, etc).

- **Strategy 5:**

  Expand the Information Literacy program. When Lib 100 was created in 2003, it was originally hoped that the Library could support three sections per semester, but the incredible popularity of the course led to significant expansion. A total of fifteen librarians and three library staff are now involved in teaching or co-teaching this course as part of their primary responsibilities with no extra remuneration. A local adjunct was added in Spring 2006 to teach two additional sections when the demand was such that first-year students were being turned away because all nine sections were filled. ZSR will build on its success with information literacy in the following ways:

  - o **Add subject-specific library instruction**. ZSR will develop subject-specific information literacy courses for students in declared majors. Courses specializing in the information of business, science, arts and

humanities, and social sciences will allow more depth in subject resources and allow subject librarians to work in their area of expertise. Basic courses will continue to be offered for first and second-year students.

- o **Offer more interdisciplinary classes and one time workshops**. Many information literacy topics have relevance for students' research and critical thinking skills outside of specific subject disciplines. Classes on topics from "information communication" to "the social nature of information," and courses such as "Information and Disinformation on the Internet" will be taught in conjunction with the Communication Department. One time sessions on using the Web for research and other topics of interest to students, taught in the right places at the right times, allow librarians to extend the concepts of information literacy to more students.

- o **Consider ways to incorporate information literacy into the core requirements.** The College Committee on Academic Planning should consider possibilities that include a requirement for information literacy classes, incorporating information literacy components into existing first-year seminars or the proposed new writing program, or offering an information literacy competency designation across the curriculum.

Estimated cost: Minimum $50,000 for an additional instruction librarian position.

- • **Strategy 6:**

The University should re-think the current decentralized approach to **academic computing**. The unique structure of a) technical operations at Information Systems, b) departmental support from individuals in the Instructional Technology Group (ITGs), c) technology training operations in the Information Technology Center of the Library, and d) the absence of all technology assistance in the Teaching and Learning Center do not present a coherent whole to either faculty or students. While there are a number of strong faculty technology leaders, rank and file faculty need more attention and support to enhance their teaching with technology. There is a strong need for centralized support and coordination in academic computing, if not a completely radical restructuring. Consideration should be given to folding the IT operations of the Reynolda professional schools and Athletics into a centralized operation. At the very least, an individual or department should be charged with coordinating the disparate parts of academic computing on the Reynolda campus.

Estimated cost: unknown.

- **Strategy 7:**

  Lead the campus in emerging technology applications. ZSR has a national reputation among academic libraries for the innovative use of emerging technologies such as wikis, blogs, gaming, image sharing sites such as Flickr, and other kinds of social software. Pilot programs are currently being conducted in Lib 100 on the use of wikis, and in the Sociology course, Social Stratification in the American Deep South, with a variety of multimedia tools. Staffing has already been internally reallocated to create an Instructional Design Librarian position to enhance the Library's own instructional efforts with these new technologies. ZSR will go further by expanding its wiki and blog hosting to the entire campus.

  Estimated cost: $25,000 for technology and staffing.

- **Strategy 8:**

  Extend Library reference service to other parts of campus.

  - **Embedded Librarians:** Establish opportunities for "embedded" librarians in the form of a reference librarian co-teaching with an instructor for an entire semester (similar to the Social Stratification course) or by having librarian office hours in academic departments or in popular student gathering places. By establishing a presence in classroom buildings, students can understand the Library and its resources in the context of their existing academic environment. This makes the Library more accessible to students who don't normally use its services.

  - **Bring Library programming into residence halls:** Library staff will work with Residence Life to offer one-time, targeted sessions for students in their hall at opportune times during the year. Topics could cover subjects like "using Google Scholar" or "finding good stuff on the Internet."

  - **Service Learning Initiatives:** Typically, service or experiential learning is comprised of a specialized project, traditional course material, and reflective processes. The specialized project often begins with research. The library will work with service learning classes and programs to help in these early stages of the work.

  - **Text Messaging Reference Services:** The Library needs to communicate with students using the technologies that they use. Text messaging is a highly popular evolution of instant messaging. Software exists that converts text messages to email. Students can send

messages from their cell phones that come into the Reference email and reference staff can respond via email and the student receives a text message response.

Estimated costs: Covered by internal reallocation of time; no additional funds needed.

WF Strategic Priority 3: Attract a Talented and Diverse Student Body and Develop Exceptional Young Leaders

Wake Forest students spend a great deal of time in the Z. Smith Reynolds Library, due to limited study space in residence halls and also because of the considerable workload from the University affectionately known as "Work Forest." The ZSR Library does not match the needs of the current (much less, future) generation of students. Students report that they feel as if they are in their grandmother's parlor, which is not exactly a drawing card to attract the smart, savvy students that the University needs to attract. Students need modern, comfortable spaces that are conducive to both individual and group work, and these are not to be found outside the Library's grand atrium.

- **Strategy 9:**

  Build a Student Learning Center for the campus that draws together, in one location, various student support systems including new library service and study spaces, the Learning Assistance Center, Writing Center, IS Help Desk and Teaching and Learning Center. This could be accomplished within the Crossroads Center for Interdisciplinary Programs being proposed in the College strategic plan. If constructed in the area bounded by ZSR, Olin Laboratory, Salem Hall and parking lot E, it could be connected to the existing library. It is recommended that the University employ "green building" practices in any new construction. Library spaces that could be located here include:

  - collaborative study spaces: existing group study rooms are few in number and in constant use;

  - classrooms: 9-11 sections of the Lib 100 course are offered each semester, and the existing classroom space within the library has been exhausted;

  - auditorium: library lectures and other programs are limited by classroom-sized spaces; overflow crowds are common and embarrassing;

- o environmentally controlled space for ZSR's Special Collections: ZSR has exquisite manuscript and rare book collections that are currently subject to wild humidity and temperature fluctuations. Student classes are the heaviest users of special collection materials;

- o coffee shop: ZSR is one of few remaining academic libraries our size without a casual coffee shop for collaboration and community;

Estimated cost: $ 5-10,000,000 for Student Learning/Crossroads Center with library space. Potential capital campaign item.

- **Strategy 10:**

  Renovate the existing Library. The Z. Smith Reynolds Library was one of the first three buildings to be constructed on the Winston-Salem campus in 1956 – and it looks it. The Reynolds wing has been largely left untouched with the original furnishings, decor and building infrastructure. This is not the kind of modern facility that will attract high-caliber students who have many choices in where to attend college.

  - o Implement the **Five Year Plan,** which was drawn up in 2005 to renew the systems infrastructure of the building and needs to be put into action as quickly as possible. The **heating and cooling system** is very erratic and uneven. Students and staff complain simultaneously of freezing in one room and roasting in the next. There is a serious shortage of **electrical outlets** for today's Thinkpad generation of students that could never have been foreseen by the original architects and is the number one complaint of students today. **Lighting** in the stack and study areas is totally inadequate. **Building doors, windows, plumbing, and floor coverings** are all archaic and need to be replaced.

  - o Replace all **furnishings (tables, chairs, carrels)** with comfortable, student-friendly furniture and study spaces. Today's libraries have an emphasis on flexible, open, movable furnishings that can be arranged and rearranged by students to meet the need of the moment. Additional **group study spaces** need to be created with innovative furniture such as booths and wing tables with room partitions.

  - o Centralize service desks into an **Information Commons**, which has become standard in academic libraries across the nation. Combining main service points such as reference, circulation and technological support into a central focal point will help students find the right people to help them. ZSR currently has 6 separate service desks,

four of which are on the 4th floor alone. (Alternatively, an Information Commons could be built into a new Student Learning Center.)

Estimated cost:

Five Year Plan: $ 4,210,000 over 5 years; need to begin immediately;
Furnishings: $ 2,000,000 (Potential capital campaign item).

- **Strategy 11:**

   Keep ZSR open 24 hours, 5 days a week while classes are in session. College students operate on different biorhythms than most of the rest of the population. It is normal for them to study until 4:00 am or later, while the rest of the world is asleep. At student request, ZSR extended its hours of operation to 1:00 am in 2005 and instituted the highly successful Wake the Library program in 2006 to stay open 24 hours during finals. Now, the students are asking that ZSR stay open 24 hours a day as part of normal operations. A number of other academic libraries have gone to this practice, including North Carolina State, Elon, and Georgia Tech to name just a few neighbors. Wake students say that there are very few safe, comfortable places to study on campus late at night.

   Estimated cost: Internal reallocation will fund one library staff member to work a 12:00 am – 8:00 am shift. However, an estimated $30,000 in additional police coverage will be required to make the program safe.

WF Strategic Priority 4: Create a richer sense of community throughout the University

The Library enjoys a singular place on campus in that it serves all members of the Wake Forest community with a warm, inviting and non-threatening atmosphere. It was very clear in the University's situational analysis that Wake Foresters long for places to gather in a genuine sense of community. The Z. Smith Reynolds Library is well positioned to be such a place, with some minor renovation.

- **Strategy 12:**

   Create a full-service coffee shop within the Library. Cafes and coffee shops have become *de rigueur* in academic libraries. It is difficult to find a peer library without one. The reason is simple: people (especially students) like to eat and drink while reading. Most academic libraries, including ZSR, have relaxed formerly draconian prohibitions against food and drink in the library, with the exception of Special Collections areas. Faculty, staff and students would all enjoy lingering over a cup of coffee, surrounded by colleagues and good reading material. Programming such as poetry slams,

book signings and small art exhibits could all take place in such a space. This initiative could be accomplished in one of two ways:

- o Partner with Aramark to construct a coffee shop in Rhoda's Cafe and Reading Room. Aramark officials have already approached ZSR on this possibility and will provide at least partial funding.

- o Construct a coffee shop in any new Student Learning/Crossroads Center.

Estimated cost: partner with Aramark.

- **Strategy 13:**

  Create a Faculty Lounge within the Library. There are few places on campus that faculty can meet colleagues from other departments in a comfortable, relaxed setting. Faculty are among the loudest voices crying out for a place to enhance that missing sense of community. A well-equipped lounge where faculty can read the *New York Times* or the *Chronicle*, meet colleagues, and engage in dialog would promote interdisciplinary efforts and faculty satisfaction. A number of spaces in the Library could be converted to a faculty lounge with little trouble, including the Emeriti suite on the 8th floor, the Johnson Room on the main floor, or the special purpose office suites on the 3rd floor.

  Estimated cost: $50,000 one-time cost for renovation and furnishings

- **Strategy 14:**

  Create a graduate student lounge in the Library. In many respects, graduate students are the step-children of the University. They do not have the elevated status common at other universities and are lacking in many areas including technological support, health care benefits, and research library materials. Creation of a graduate student lounge in ZSR would give them a heightened sense of belonging to the Wake Forest community and opportunity for greater productivity. The same spaces mentioned above for the faculty lounge could also be used for graduate students: 8th floor suite, Johnson Room, 3rd floor suites.

  Estimated cost: $50,000 one-time cost for renovation and furnishings

WF Strategic Priority 5: Strengthen Wake Forest's connections to communities beyond our campus.

Libraries are models of connected, collaborative, community organizations. For nearly a century, public and academic libraries have formed strong networks to share, rather than compete with each other. No single library will ever have all the resources that may be needed at some point by its users. Thus, librarians have developed a strong resource-sharing philosophy for the greater good, akin to Wake Forest's spirit of Pro Humanitate. Reciprocal borrowing programs are common, even at private universities. Duke, for example, routinely lends its materials to the three public members of the Triangle Research Library Network.

ZSR has only recently begun to adopt a more open approach to the surrounding community. A partnership was begun in 2005 with the Winston-Salem Forsyth County schools when they started an International Baccalaureate program. The Digital Forsyth grant is in the second year of a three-year project to digitize historical photographs from the major libraries in Forsyth County: Wake Forest, Winston-Salem State University and Forsyth County Public Library. A number of strategies offered above, such as auditorium or cafe space for programming would be available to the local community. Further options to strengthen our connections to communities beyond our campus include:

- **Strategy 15:**

  Reduce the fee for external borrower's cards from $100 to a more nominal amount, including local high school students, teachers, and other members of the community who are not affiliated with an academic institution.

  Pursue a reciprocal borrowing agreement with the members of the Triad Academic Libraries Association, including the faculty, staff and students of institutions of higher learning in Forsyth, Guilford and Alamance counties.

  Estimated cost: none.

Library Strategic Priorities

In order to ensure the excellence of overall library operations, ZSR staff have identified a number of priorities outside of the University's strategic priority structure.

- **Strategy 16:**

  Plan for the acquisition of a new integrated library system for the campus.
  The "integrated library system" (ILS) has traditionally been the backbone of

library automation, including such functions as the online catalog, circulation, ordering new materials, periodical check-in, electronic reserves, etc. The ILS shared jointly by all three Wake Forest libraries is now eight years old and nearing the end of its lifespan. It is certain that a new ILS will need to be acquired sometime during the ten year lifespan of this strategic plan. However, the library automation industry is currently at a crossroads. Libraries of all types are frustrated by legacy systems that perpetuate outmoded methods of searching and access, but ILS vendors have not yet offered the radically new approaches to Google-like organization and discovery that users are demanding. The marketplace has recently seen high-level mergers and the advent of private equity firms, but the software is still the same. Some libraries have grown tired of waiting for the industry to solve their problems and have turned to open source solutions. For example, a consortium of public libraries in Georgia have designed their own system, aptly named Evergreen, and savvy academic libraries are sure to follow.

The selection of a new ILS for the Wake Forest community involves coordination between the Health Science and Reynolda campuses. To date, cooperation has been strong among the three libraries (Professional Center, Coy C. Carpenter Medical Library, and Z. Smith Reynolds). Reaching consensus on a new commercial product or venturing into the open source realm will be a task that needs to be carefully considered in the near future.

Estimated cost: $500,000 to $1,000,000 for three campus libraries.

- **Strategy 17:**

  Strengthen library advancement efforts

  Until recently, ZSR was discouraged from participating in fundraising initiatives. In the past year, a modestly successful effort to raise money for oak book shelves in the atrium helped to reverse that trend. The greatest development success has been library involvement in the *Presidential Trust for Faculty Excellence*. The Library has received almost half a million dollars in gifts and pledges from this creative and worthwhile fundraising effort. Funds have been used to purchase research-level material that would not have been possible within the annual operating budget. To enhance and strengthen library advancement efforts for the future, we propose the following:

  - **Include the Library in the upcoming capital campaign**. A number of large-scale needs have been described in the pages of this strategic plan that would be eminently suitable for campaign funding. The Library also has the advantage of a number of physical spaces that lend themselves to naming opportunities.

o **Designate a major gift officer exclusively for the Library.** Most peer libraries and even libraries from smaller, less prestigious institutions employ a dedicated development specialist.

o **Implement the "Friends and Family" computer purchase program** included in the Lenovo IT hardware contract for the benefit of the three Wake Forest libraries. ZSR is willing to manage the program.

o **Add a check box** to the online giving page for campus libraries directly underneath the Deacon Club in the Restricted Giving section.

Estimated cost: defer to Advancement.

Organizational Development Initiatives

- **Strategy 18:**

  Implement remainder of compensation plan for library professionals. In 2005-06, a comprehensive study was conducted jointly by Human Resources and the library administration to identify the salary gap between ZSR librarians and other exempt professionals and national and regional peers. The gap was found to be approximately 25% (very similar to faculty) and a five-year plan was devised to remedy the situation. With the FY08 budget, targets for the first two years of the plan have been accomplished. A similar study was undertaken for non-exempt library staff and a three-year plan was identified. A combination of this year's non-exempt funding initiative from the University and salary savings from collapsed positions accomplished almost all of the targets in this non-exempt category. The remaining three years of the librarian/professional plan remain to be implemented. This may be partially addressed in the University's promised focus on exempt staff salaries in FY09.

  Estimated cost: $235,000 over three years.

- **Strategy 19:**

  Investigate and propose **a plan for academic status for Wake Forest librarians**. Librarians enjoy a middle ground, somewhere between faculty and staff, in the classification of academic personnel. Many universities (Notre Dame, Colgate, UNC system) include librarians among the ranks of academic faculty. A working group of representatives from the Professional Center Library and Z Smith Reynolds Library are currently investigating the options for initial appointment, rank, promotion, and continuing status, and plan to present a proposal to Provost Tiefenthaler sometime after her arrival.

  Estimated cost: to be determined.

- **Strategy 20:**

  Establish a two-year **Diversity Librarian Residency program**. Since 2004, efforts to increase the diversity of the library staff, especially at the librarian level have been unsuccessful. This may be attributed to a variety of factors: lack of a critical mass of existing faculty and librarians of color on campus, lack of salary dollars to attract highly recruited minority librarians, and a small number of minority librarians in the pipeline. Modeled after similar programs at the University of Tennessee, Notre Dame and North Carolina State, the purpose of the proposed program is to attract recent library school graduates from underrepresented groups to a challenging and rewarding career in academic librarianship. Successful candidates will serve as residents for two years and may be eligible for permanent employment upon completion of the program as vacancies allow. Residents will work closely with librarians to develop skills and career plans, develop collegial relationships with University faculty, participate in Library committees, and become involved with professional associations. Residents will work in several areas of the Library and take part in a variety of initiatives and projects.

  Estimated cost: $100,000 annually to support two positions, fringes, travel and professional development opportunities.

Other Initiatives

- **Strategy 21:**

  The University needs to devise a comprehensive plan for **upgrading standard office equipment** on campus. Perhaps modern photocopy machines should not rise to the level of the strategic plan, but all other efforts to bring this to the urgent attention of the University have failed. Copy machines in the library are so old that toner cartridges are no longer manufactured for them.

  Estimated cost: defer to Purchasing.

- **Strategy 22:**

  Install a self-checkout machine in the Library. Self-service is a very significant trend in libraries. This would not take the place of mediated circulation services, but would be a convenient and time-saving option for those who prefer user-initiated service models. RFID technology is not recommended at this time due to privacy concerns.

  Estimated cost: $25,000.

Conclusion

Implementation of the proposals in this plan would bring the Z. Smith Reynolds Library to its desired vision for the future. Aspirations for the Library are bold, but so are the aspirations of the University. A superlative Library needs to be in place to provide the resources needed to lead the University to the achievement of its goals.

Due to the widespread participation in the strategic plan by ZSR staff at all levels, there are dozens of additional proposals for "quick fixes" that will not be identified here but can and will be addressed within existing library policies and funding.

Onward.

Lynn Sutton, Ph.D.
Director, Z. Smith Reynolds Library
May 24, 2007

<u>Appendix</u>

Z. Smith Reynolds Library

Strategic Planning Groups

<u>Environmental Scan</u>

Craig Fansler
Carolyn McCallum
Erik Mitchell
Lauren Pressley
Waits Raulerson
Mary Reeves
Susan Smith, Chair

<u>Blue Sky</u>

Elise Anderson
Wanda Brown, Chair
Christian Burris
Renate Evans
Kevin Gilbertson
Lauren Pressley
RosalindTedford, Assistant Chair