

## **Z Smith Reynolds Library Strategic Priorities 2012-2014**

Z Smith Reynolds Library's [previous strategic plan](#) was put in place in 2007, in conjunction with the [Wake Forest strategic plan](#). By 2011, all viable components of the plan had been accomplished. Our success in accomplishing this ambitious plan was affirmed when ZSR won the [ACRL Excellence in Academic Libraries award for 2011](#).

The 2011-2012 academic year brought change to Wake Forest as Provost Jill Tiefenthaler left and the search for her successor took place. Rather than mark time as we waited for a new Provost to arrive, we believed that it was important to continue to move forward. As the University prepares to embark on a new Capital Campaign, we realize the importance of continuing to position the Library to lead the transformational changes that are happening in higher education today.

We began our effort to identify new strategic priorities at a library-wide retreat in January 2012. Together, ZSR Library faculty and staff identified 5 meaningful "Big Ideas" that formed the basis of the priorities we undertook over the next two years. These were in addition to our Space Renovation 5-Year Plan, which was already underway, and the subsequent addition of priorities for the Library's instruction program. In addition, a suggestion to create a [ZSR Library Values Statement](#) emerged in discussions following the retreat. Small groups of volunteers were formed to develop each idea and to craft a values statement. Each working group crafted a report that formed the basis for the priorities presented here.

For each strategic priority, we present a statement of importance, action items and timeframes.

**As 2014 comes to a close, most action items have been completed as noted on each of the individual "Big Idea" sections below.**

### **The Shift from Print to Digital Information**

An unprecedented societal shift is taking place that is transforming the very nature of how libraries provide information services. As increasingly sophisticated technologies drive the move from print to digital information, changing user expectations affect library collections, space utilization, resource acquisition and the library's role in the academic endeavor. To some extent, this parallels the fundamental changes that are taking place in higher education, with a shift from face-to-face instruction to a more virtual approach that is not bound by time or place.

Print collections are rapidly being replaced by digital access. The old model of locally owned discrete print collections has given way to a new model - one where libraries operate in shared environments that range from local print and digital collections to regional and national print and digital archives. It is imperative that the ZSR Library embrace these shifts and take steps to lead the evolution of user information needs as the larger academic environment itself changes. These significant changes will revolutionize the way faculty and students access the existing corpus of scholarly literature. The impact to libraries includes changing acquisitions models from ownership to access, and from buying books "just in case" to letting patrons drive the purchases as materials are needed for their research.

Librarians across the U.S., including those at ZSR Library, collaborate on major initiatives to coordinate storage of archival print copies (e.g. through the Association of Southeastern Research Libraries shared print repository) and participate in preserving digital archives in perpetuity (through projects like Portico and CLOCKSS). Increasing numbers of publications are being born digital and ensuring continued access to scholarship is an enduring library mission that is increasing in complexity. The shift in emphasis to the digital format for scholarship is spreading from the now common e-journal to the monograph, influenced by the rise of e-reader devices and consumer-oriented e-books, as well as the Google Books and HathiTrust initiatives. Use of streaming media (video and music) in classroom instruction and research (e.g. JOVE) continues to increase. The current state in the marketplace for monographs and media is one of turbulence, with barriers to use due to various platforms and standards, proprietary software, digital rights management, and copyright concerns. In an even less-developed area of digital content, researchers and publishers are grappling with provision of original data sets alongside the published research article. Not only in the sciences, but also in the humanities, researchers are utilizing commercially purchased data sets to carry out their work. Content is no longer simply text-based and we must prepare ourselves to be agile in collecting, handling and disseminating new forms of scholarship, from streaming videos to research data sets.

#### Action Items (*timeframe*)

- Create a new Digital Scholarship Unit comprised of the Scholarly Communication Librarian and a new Digital Initiatives Librarian position to cover the wide range of digital needs that span the academic and administrative domains of the University (*Fall 2012*)  
**Completed:**
  - Design and implement a digital curation program to assist WFU academic departments in managing research data (*2013-14*) **Targeted for completion Fall 2014**
  - Create a digital preservation plan to address the long-term stability of our digital assets (*2013-14*) **Planned for Spring 2015**
- Establish a scalable data storage system that will handle the growing need of the WFU community to house digital media to support programs including online education and the documentary film program (*2012-13*) **Completed**
- Leverage national initiatives for access to massive digital collections by joining HathiTrust (*Fall 2012*) **Completed**
- Increase our transition to patron-driven e-book acquisitions (*2012-14*) **Completed**
- In collaboration with WFU Digital Publishing, investigate longer term opportunities for publishing collaborations, including born-digital Wake Forest scholarship as well as hosting open access journals for faculty or students (*2012-14*) **Ongoing**

#### Digitization of Unique Materials

As digital technologies and the Internet have made scholarly content more widely available in electronic formats, the need for academic libraries to exist primarily as print repositories is disappearing. The value that our library can bring to our community and beyond lies partially in our ability to make Wake Forest's unique resources (within and external to the library) digitally accessible.

Since 2000, the library has undertaken projects to digitize library materials on an ad hoc basis - through grant funding and as internal resources have been made available. Less has been done in digitization of University materials external to the Library's Special Collections and Archives.

A few projects have been undertaken and presented in the Library's digital repository, WakeSpace. However, there has not been a substantial and sustained effort to collect and digitize collections from other divisions on campus.

In order to effectively maximize the digitization services we already offer, and to better position ourselves among peer institutions in the field, we will undertake the following action items:

#### Action Items (*timeframe*)

- Hire a Digital Initiatives Librarian to develop, coordinate, and guide a formal digitization program (*Summer/Fall 2012*) **Completed**
- Enhance the Library's web presence to highlight current and new digitization services (*Fall 2012*) **Completed**
- Conduct an in-depth audit of digitization capabilities and achievements to date (*Winter 2013*) **Completed**
- Strategically re-vision WakeSpace, including current content as well as future areas of growth such as GIS, research data, video, student work, etc. (*Spring-Summer 2013*) **Completed**
- Collaborate with WFU Digital Publishing to identify, create, digitize, and digitally publish University-created content (*2012-14*) **Ongoing**

### **Enhanced Tools for Discovery of Information Resources**

Today's library users bring a wealth of experience with Internet search tools and they expect to have a similar experience when searching for library resources. Important components include ubiquitous access to search, a single search to find "everything," simple search syntax, post-search refinement and frequent interface enhancements.

Although the current generation of discovery services ambitiously addresses such issues, there is still much work to be done before our users have seamless search capabilities to discover what they need from among the millions of information items the Library provides. In addition, users are coming to library resources from many disparate starting points. No longer is the library catalog or library website the assured beginning for users to find our resources, nor can we assume which form factors are being used to search for library resources.

Although the newer commercial discovery services cover everything in the catalog and more, the library catalog is still the primary tool for researchers to find specific works in our collection. It is important that we leverage new technologies and data structures to evolve our catalog to improve discoverability for our users.

Our overall strategy is to address the wide variety of issues on an iterative basis, working to improve those interfaces where we have control (e.g. VuFind, WakeSpace and the website) and collaborating with vendors to guide enhancements to third-party interfaces (e.g. Summon).

#### Action Items (*timeframe*)

- Design and install website and VuFind interfaces within this school year using responsive design techniques to support desktop, tablet and smartphone users (*2012-13*)
- Take steps to improve the integrity of data and discoverability of our local resources
  - Implement authority control to improve data quality, enabling users to find all items about a given topic (*Fall 2012*)

- Fully adopt RDA (Resource Description and Access) as the local cataloging code at ZSR (*Fall 2013*)
- Improve our digital collections interface to WakeSpace (*Fall 2012*)
- Improve VuFind functionality (*Fall 2012*)
- Implement Omeka as a digital collections exhibit interface (*Fall 2012*)
- Prepare for the next generation of integrated library systems, considering both open source and commercial alternatives (*2012-2014*)

## Maximizing People Resources

The strength of the Z Smith Reynolds Library is its talented faculty and staff. As evidenced by the 2011 ACRL Excellence in Academic Libraries Award, other research libraries have bigger collections, greater resources, and technology programs that are much bigger in scope, but no library better meets the needs of its users and advances the mission of its university than ZSR. We try to foster a culture of creativity, where people are encouraged to take risks. Both faculty and staff are uncommonly service-oriented and collaborative. They are motivated, not for personal gain, but to help Wake Forest students and faculty succeed.

The library has a relatively small faculty and staff compared to its large mission. As a result, ZSR sometimes lacks critical mass in technology infrastructure and staffing for more specialized tasks such as mass digitization, digital curation, and specialized cataloging. An unexpected outcome of this year's strategic planning efforts was the identification of faculty and staff unrest with increasing workloads due to growth in programs but a staff that remains small in size. It is possible for people to rise to the occasion and accomplish major initiatives through heroic efforts, but it is not reasonable to expect them to sustain that pace over time. The joyous work climate shared at ZSR in recent years is now at risk. Peer groups of library faculty, exempt and nonexempt staff met to discuss common issues and to brainstorm ways to ease the pressure.

### Action Items (*timeframe*)

- Obtain and analyze market data from Human Resources for library faculty and staff positions; seek funding to bring salaries up to median of peers (*Summer 2012-Winter 2013*) **Completed**
- Conduct one-on-one sessions with every employee to identify and resolve issues with work-life balance, flex time, and cross-training (*Summer 2012*) **Completed**
- Make elder care/child care options known to staff (*Summer 2012*) **Completed**
- Develop and implement ZSR Diversity plan (*Winter 2013*) **Completed**
- Request Diversity Residency as WFU Strategic Initiative (*Fall 2012*) **Deferred due to end of Strategic Initiatives funding**

## Outreach

The Library has been successful in the past few years in telling its story in a way that reaches out to current and potential audiences including students, parents, alumni, faculty, and donors. In this strategic priority we will enhance these efforts to leverage more visibility and position us more strategically for the Wake Forest capital campaign.

### Action Items (*timeframe*)

- Create an outreach website that encompasses ZSR fundraising, news and events, promotional articles, and video (*Summer-Fall 2012*) **Completed**

- Incorporate video storytelling into outreach. For external audiences, coordinate with University Advancement (2012-14) **Completed**
- Highlight the importance of the Senior Showcase program by establishing a named monetary award for each student recognized. Until endowed funding is established, fund from the ZSR Friends of the Library account (Spring 2013) **Completed (Internal funding)**
- Collaborate with other University units to reach alumni, parents, students and families through planned social events (2012-14) **Ongoing**
- Make the ZSR brand more consistent and comprehensive in style and presentation (2012-14) **Ongoing**

## Instruction

Z. Smith Reynolds Library (ZSR) has a well-respected instruction program, both within the institution and the larger library field. Unusual to libraries: ZSR offers several sections of various library related credit-based courses in which students clamor to enroll and faculty enthusiastically recommend. In addition to this formal instruction, ZSR also offers exceptionally high quality and personalized single-session instruction in academic classes, workshops, small group and one-on-one personal research sessions, and interactions at the reference desk.

ZSR has been a leader on campus in professional development for the department's instructors and technology-enhanced education. The library has offered technology workshops for faculty over the years ranging from how to use various emerging technologies to why one might use them for teaching and research. ZSR has also paved the way for discussions about evolving the teaching methods at Wake Forest University (WFU) by offering the first fully online undergraduate class and being actively involved in discussions of online education for the University. In the Spring of 2013, the Library offered the first massive, open, online course at Wake Forest: ZSRx, a mini-MOOC for parents and alumni, on how to search the web more effectively.

The instruction program is an outstanding example of ZSR's mission to help students, faculty, and staff succeed. This program helps students do better work and helps faculty evaluate better-researched projects. ZSR stands out among peer libraries in the depth and breadth of its instruction program as well as the University's support for it, from students to professors to administrators.

The overarching goal for the instruction program should be to reach more of our undergraduate students while working to maintain and improve the quality of the services we offer.

Instruction programs at other colleges and universities offer generic instruction to more students. Some offer high quality interactions to a very small percentage of their population. ZSR is uniquely positioned to give a large percentage of our student body an extremely high quality, personalized, library instruction program. That program is in the spirit of the "Wake Forest" way, and is what ZSR aspires to achieve.

### Action Items (*timeframe*)

- Build additional classroom space. (2015) **Pending Capital Campaign funding**
- Write proposal for credit-bearing online version of LIB100 and submit to the College Committee on Curriculum. (Fall 2013) **Completed**

- Concentrate LIB100 Instruction by Lecturers and eLearning Librarian. (*Fall 2013*) **Completed**
- Develop the ZSRx series with classes for incoming parents, digital publishing, and genealogy. (*Fall 2013*) **Completed**
- Develop additional 200-level credit-bearing classes (*2013-2014*) **Completed**
- Explore the development of a generic “Topics in Information” course that would facilitate teaching of a variety of more focused topics by library faculty. (*2014*) **Ongoing**
- Develop a three-credit version of Information Literacy class for online and/or face-to-face delivery. (*2014*) **Deferred**

## Five Year Building Plan

\*This plan became the basis for the major component of [ZSR Library’s Wake Will Capital Campaign](#) – see [Build a Library for the Future](#).

ZSR is the most heavily used academic building on campus, but it is showing its age, with most of its original infrastructure and some furnishings from the 1950’s. Concurrently, systemic disruptive changes in the academic information landscape are having major impacts in how our patrons want to use the physical space that is ZSR Library. To address these issues and ensure success for Wake Forest faculty and students, the ZSR Library proposes to make radical changes to the existing building and the way it is used. We have created a 5-Year Building Plan that systematically presents our proposal to rethink, refresh, and renovate the building that is the intellectual center of the University.

Together with Facilities’ infrastructure needs for the building and the programmatic plan for functional enhancement of library services, we are seeking to identify total funding, from both university and capital campaign sources, that will address both this long deferred maintenance and programmatic renovation for the future.

Over the next five years (2012-2016), we propose to

- Empty the 4th and 6th floors in the Wilson Wing of printed materials and construct collaborative learning spaces where students will enjoy the support of library professionals as they learn how to find, evaluate, and utilize digital information of the highest quality.
- Use the Reynolds Wing, with its structural stacks that cannot be easily used for anything else, to house the most heavily used print collections.
- Utilize the library’s new offsite storage facility to house lesser-used materials that have not yet been replaced with permanent, digital access. Collaborative regional agreements with the libraries of the Association of Southeast Research Libraries will ensure access to print originals of a large number of research journals, where digital access is the norm.
- In collaboration with Facilities, address long deferred infrastructure needs including HVAC distribution, plumbing, electrical and exteriors.