

# University Library System (ULS) FY18 Planning and Budget Report

## Contents

Executive Summary .....	2
Mission/Vision Statement from ULS Long Range Plan 2014-2017 (Extended to 2018).....	2
Strategic Priorities from ULS Long Range Plan 2014-2017 (Extended to 2018).....	2
Summary of FY17 Accomplishments .....	3
Overview .....	3
Brief Statement of FY18 Strategic Priorities and Actions .....	6
Overview .....	6
FY18 Priorities.....	6
FY18 Strategic Actions and Targeted Measurable Outcomes .....	8

## Executive Summary

### Mission/Vision Statement from ULS Long Range Plan 2014-2017 (Extended to 2018)

The University Library System (ULS) advances the University's strategic priorities by direct engagement in the enterprise of knowledge creation, teaching, and learning on our campuses and beyond. Through our deep expertise, rich information resources, inviting facilities, and innovative services, we catalyze partnerships and inspire intellectual discovery, critical thinking, creative expression, the free flow of ideas, and the worldwide progress of knowledge.

The primary users of the ULS include the students, faculty, and staff of the University of Pittsburgh and, through our collaboration with organizations and institutions worldwide, the global research community.

### Strategic Priorities from ULS Long Range Plan 2014-2017 (Extended to 2018)

- **Excellence in Education:** Consistently deliver resources, services and facilities to enhance learning and growth in academic programs and to support excellence and innovation in teaching and instruction.
- **Pioneering Research:** Enrich the University's research enterprise by providing resources, services, training, and expertise throughout the research lifecycle to support scholars as they discover, gather, create, and share innovation and new knowledge.
- **Community Strength:** Exemplify the principles of diversity and inclusion, freedom of information, the free flow of ideas, and an informed citizenry by being a locus of shared, openly accessible, and trusted content about the Pittsburgh region, enabling self-education and the pursuit of cultural, professional, economic, and personal interests.
- **Global Reach:** Increase the University's global impact by ensuring that the output of Pitt researchers is made visible to a global readership, supporting Pitt's international research and learning programs, and fostering the global sharing of knowledge.
- **Top Value:** Sustain our organizational commitment to efficiency through careful planning, assessing, and partnering. Demonstrate the value and expertise we add to the teaching and research endeavors of the University and seek opportunities and resources to support our ongoing efforts.

## Summary of FY17 Accomplishments

### Overview

In FY17, the ULS began to re-invent our main library and prepare for its renovation, and we continued to improve our services, embed support for digital scholarship, work collaboratively across the University, and forge new directions.

### Re-envisioning Hillman Library

The new vision: Hillman Library will be the principal hub of intellectual activity on campus providing services, resources, and inspiring spaces—from vibrant to serene—that advance academic study, stimulate innovation in knowledge creation, encourage intellectual exploration and creativity, and foster energetic, collaborative exchange.

- Interim director Fern Brody convened a Hillman Library Renovation Advisory Group comprised of stakeholders from the ULS, academic departments, the provost's office, project architects, and facilities department. Facilitated by a consulting firm, this advisory group met several times in the fall to discuss existing user-centered design studies done by ULS and to share information around the state of the art of forward thinking libraries. The group developed an initial program plan – a definition phase – for the renovation through various exercises and reports.
  - General programmatic conclusions:
    - Increase seating for library users
    - Increase space for collaborative work
    - Increase technology enriched spaces
    - Increase space for specialized services, such as bibliometrics, data management, writing support, and creativity programming
    - Increase spaces for the creation of knowledge in digital form
    - Increase spaces to highlight users' digital products and research
    - Provide dedicated spaces for faculty and graduate students
    - Decrease the size of the general print collections in the building
    - Enhance space for showcasing and using our distinctive collections.
- In preparation for the renovation, library collections in Hillman needed to be either shifted within the building, moved to other libraries on campus, or moved to the Library Storage Facility, which is rapidly filling. This academic year, the fourth floor of Hillman is being cleared for renovations that begin May 1<sup>st</sup>. One existing full-time staff person has been reassigned to manage this work. On average, 3,000 items per day are being moved as our temporary staffers work to clear some seven miles of shelved material on that floor alone. As of February 13th, more than 4.5 miles of material has been transferred to the Engineering Library, to storage or moved to the 2<sup>nd</sup> or ground floors in Hillman Library.
- As our physical footprint of books will be shrinking on the main campus, a team within the ULS examined the role of browsing collections for intellectual discovery, both physically and virtually. More exploration will follow in the next year.

## Engage in Research of Impact

As a continuation of an expansion in space and services related to digital scholarship and to support new areas of research, the ULS has focused on several strategic areas around the facilitation of a data rich environment.

- ULS representatives participated in University-level planning through the Pitt Data Commons group. The group wrote its report and delivered it to the Provost and the Vice-Provost for Research last July. We look forward to collaborating as called upon with the Vice Provost for Data and Information and the future Senior Vice Chancellor for Research on the implementation of the recommendations.
- The ULS has targeted outreach efforts to graduate students to place their datasets in the ULS institutional repository. The ETD Data Project Group has published dataset-deposit documentation linked from D-Scholarship@Pitt and integrated it into existing research management LibGuides. Team members have been attending relevant events, such as the dissertation writing boot camp, to promote deposit of datasets in D-Scholarship@Pitt. A decision tree has been created to help D-Scholarship@Pitt depositors think through when to deposit data as a standalone record.
- Existing geographic and spatial data services have been expanded to include other areas of data-centric research, especially in the humanities and social sciences. In response to the departure of existing ULS GIS staff, a cross organizational GIS Services team has been created to coordinate reference and support. GIS Student Assistants are being hired and trained.
- A new Bibliometrics Service was launched this year. The mission for the service is to help the Pitt research community access, use and interpret bibliometric and altmetric data and indicators. A team of ULS librarians and staff answer questions related to bibliometrics and present workshops to the university community.

## Advance Educational Excellence

The ULS strives to support the changing learning and research habits of our students, staff, and faculty.

- To facilitate the use of our unique archival collections, the ULS is making it a strategic priority to complete implementation of a more modern, flexible digital library infrastructure. We reached an important milestone in October with the release of three updated websites to the public: Historic Pittsburgh, Documenting Pitt, and ULS Digital Collections. These three sites represent most of the content to be migrated from our legacy system to a new flexible system, called Islandora. Our external partners who have contributed content to Historic Pittsburgh have been actively using our new platform. In December, Historic Pittsburgh was enhanced to allow searching of University of Pittsburgh finding aids directly within Historic Pittsburgh. Future enhancements to the new Islandora System are now being prioritized.
- The Hillman Library continued to expand a pilot partnership to provide equipment for media creation. What began as a film equipment lending pilot project for film production classes has expanded into other equipment needs and partnerships. Additional space and two staff positions have been dedicated to this growing service area. A one-button recording studio has been created as a space for the video needs of students, recording presentations for classes or practicing interviewing.

- The ULS has begun a pilot partnership with the Center for Creativity. We will start by focusing on cross-promotion, original programming, and equipment lending.
- In collaboration with the University of Pittsburgh's Office of Undergraduate Research, Scholarship & Creative Activity, the library has again offered the Archival Scholars Research Awards (ASRA) to ten undergraduate students in spring 2017. Awardees receive a stipend to work with a faculty mentor to develop independent research projects that draw upon resources found in the University of Pittsburgh's archives and special collections. Throughout the semester, students receive archival training from librarians, archivists, and curators, attend three workshops, and participate in an end of term presentation of their research.

### **Strengthen Communities and Build Foundational Strength**

To improve our own internal community and facilitate partnerships, the ULS has made progress on several new strategic priorities.

- In our work to exemplify the principles of diversity and inclusion, the ULS has aligned library outreach and programs with university efforts in these areas. For example, five liaison librarians participated in an Extended Diversity Institute workshop project to support increasing diversity in the curriculum.
- The ULS' Diversity Intern Program is in the process of being evaluated and improved. We are examining the core objectives of the program and conducting qualitative interviews with past participants.
- During Black History Month, the ULS hosted a reception to recognize and commemorate the work of the late Rep. K. Leroy Irvis. The event marked the opening of a new exhibit that documents Mr. Irvis' passion to expand educational opportunities. Following remarks by Pittsburgh Mayor Bill Peduto, the Mayor's Office read a proclamation declaring February 10 "K. Leroy Irvis Day" in the City of Pittsburgh. Also present was Mrs. Cathryn Irvis who unveiled two busts and two masks that were hand-sculpted by her late husband which became part of the library's K. Leroy Irvis collection.
- Two new practitioner groups have been created internally to improve communication and knowledge sharing. The goal is to translate the work of these groups into better workflows and improved service. The ULS has instituted a liaison librarian community of practice for subject and area studies librarians to better partner with faculty, staff, and students. A digital humanities interest group and digital humanities practitioner group share information, practice, and research.

## Brief Statement of FY18 Strategic Priorities and Actions

### Overview

The ULS's FY18 strategic priorities were developed through a highly-participatory, organization-wide planning process. FY18 actions build upon FY17 accomplishments and use evidence, reported above, to support the cost-effective application of resources. Renovation planning is a major theme that runs throughout this year's strategic options. The ULS will focus on ensuring a well-planned and executed renovation and reinvention with opportunities for input from a broad range of campus constituents. With a smaller collections footprint in the renovated Hillman on the horizon, we have decided to focus our strategic planning on rethinking the role of general and unique collections in the ULS, maximizing efficiency, minimizing disruption, and facilitating meaningful use of collections.

### FY18 Priorities

Our FY18 plan extends the fundamental goals of the ULS Long Range Plan and the institution-wide Plan for Pitt and sharpens our strategic focus in the following ways:

#### *Engage in Research of Impact*

While the ULS has invested heavily in supporting curation and assessment of traditional research outputs (journal and book publications and underlying data and software) of Pitt faculty, there has been very little work in trying to understand the needs of researchers who create "non-traditional" research outputs. These may include digital projects, original creative works (paintings, designs, compositions, choreography, plays, or pieces of writing), live and/or recorded performances of creative works or curated exhibits, etc. The project will include in-depth interviews with selected Pitt faculty working in the areas where non-traditional outputs are central to their research activities as well as tenure and promotion process. The interviews will seek to understand the current landscape relating to the curation and assessment of these outputs across the Pitt community as well as to ascertain the role of ULS in supporting these efforts.

We will also be expending significant effort on rethinking what ULS collections will look like in a renovated Hillman Library. Initiatives will center around developing and implementing collections policies for the "general collection" in a renovated Hillman, articulating a vision around our unique and rare collections, and implementing tools to enable researchers to explore our collections beyond that which search-based inquiry allows. This improved browsability will benefit several targeted populations, including self-identified print browsers, researchers of information discovery, digital humanists, digital project creators interested in maximizing the utility and discovery of their work, and others.

### *Strengthen Communities*

The ULS utilizes a liaison librarian model where librarians are assigned to several academic departments each. In some cases these librarians also, by virtue of the subject matter they encompass, liaise with University centers or institutes, but this coverage is by no means universal. This year we will undertake an audit of all University centers and institutes with the aim of identifying those whose research and outreach would benefit from closer collaborative work with ULS.

### *Build Foundational Strength*

The renovation and reimaging of Hillman Library is a very large undertaking that has already consumed a great deal of library staff time and energy and will continue to do so for the next several years. The library is committed to minimizing disruption to the campus community to the greatest extent possible and so has put forward a strategic option aimed at coordinating library-side efforts for maximum efficiency and minimum disruption. We have also put forward an option to maximize the usability of the processes for requesting materials from off site or from other libraries, and will be putting forth effort in supporting the work of the library consulting firm brightspot as they return to campus to manage a process of more fully engaging with library staff, and Pitt faculty, staff and students. Finally, we will be implementing a robust customer service training program, organized around a clearly articulated service philosophy and informed by a review of best practice recommendations. The training program would aim to improve or enhance existing ULS customer service policy and practices, encourage meaningful interactions, ensure consistency of service, and increase patron connections to resources or services through proactive approaches. The all staff communications training program option implemented in FY17 could serve as a model for this option.

## FY18 Strategic Actions and Targeted Measurable Outcomes

This section traces the connections between the institution-wide strategic plan goals and initiatives, ULS long range goals, and the strategic actions to be implemented by the ULS in FY18. Measurable outcomes are provided for each of the actions.

<p><b>Institution-Wide Strategic Plan Goal: Engage in Research of Impact</b></p> <p><b>Strategy 1: Identify and engage in strategic research opportunities</b></p> <p><b>ULS Goals: Pioneering Research</b></p> <ul style="list-style-type: none"> <li>• <b>Enrich the University’s research enterprise by providing resources, services, training, and expertise throughout the research lifecycle to support scholars as they discover, gather, create, and share innovation and new knowledge.</b></li> </ul>	
<p><b>ULS Strategic Actions</b></p>	<p><b>Measurable Outcomes</b></p>
<p>1. Convene a team to propose a vision and new umbrella term for the rare and specialized collections distributed throughout the ULS. This team will articulate a vision for distinctive collections to function as a series of nodes in a larger network within the ULS and the larger campus.</p>	<p>A report articulating the vision for distinctive collections with recommendations that may impact the organizational structure, coordination and programmatic enhancements, and design of a more suitable space.</p>
<p>2. Create a new print collection plan for Hillman Library, with consideration for departmental library collections. The upcoming Hillman renovation will change the character of the library, and the number of print books housed in the library will be significantly reduced. This presents us with the opportunity to explore best practices for our on-campus print collection. The plan will address how we organize and maintain an up-to-date and historically relevant collection that supports our faculty and students in a broad range of disciplines.</p>	<p>Creation, dissemination and acceptance of a relevant and sustainable print collection plan for Hillman Library, with consideration for departmental library collections. Immediate implementation of the plan when the Hillman Library shelving is reinstalled.</p>
<p>3. As more collections are online and off-site, browsing, a valued component of discovery for scholars and students, becomes more difficult. The option aims to investigate strategies, resources, and tools to help expand opportunities for discovery and improve the browsability of ULS collections.</p>	<p>Evaluation of commercial and open source browsing tools and add-ons, overlays, and plug-ins for the library discovery system PITTCat+.</p> <p>Development of an internal guide to browsing resources and an internal communication and outreach plan to assist colleagues in integrating these into patron instruction, outreach, and consultations.</p>

<p><b>Institution-Wide Strategic Plan Goal: Engage in Research of Impact</b></p> <p><b>Strategy 3: Expand our computational capacity</b></p> <p><b>ULS Goals: Pioneering Research</b></p> <ul style="list-style-type: none"> <li>• <b>Enrich the University’s research enterprise by providing resources, services, training, and expertise throughout the research lifecycle to support scholars as they discover, gather, create, and share innovation and new knowledge.</b></li> </ul>	
ULS Strategic Actions	Measurable Outcomes
<p>1. Conduct in-depth interviews with selected Pitt faculty working in the areas where non-traditional outputs are central to their research activities as well as tenure and promotion process. The interviews will seek to help us understand the current landscape relating to the curation and assessment of these outputs across the Pitt community. They will also provide guidance on the possible roles of ULS in supporting these efforts.</p>	<p>A report outlining current practices of Pitt researchers around the curation and assessment of their non-traditional outputs, together with a list of recommendations for ULS role in supporting these researchers.</p>

<p><b>Institution-Wide Strategic Plan Goal: Strengthen Communities</b></p> <p><b>Strategy 3: Realize impact through partnerships</b></p> <p><b>ULS Goal: Top Value</b></p> <ul style="list-style-type: none"> <li>• <b>Sustain our organizational commitment to efficiency through careful planning, assessing, and partnering. Demonstrate the value and expertise we add to the teaching and research endeavors of the University and seek opportunities and resources to support our ongoing efforts.</b></li> </ul>	
ULS Strategic Actions	Measurable Outcomes
<p>1. Convene a team to develop a written report outlining a framework for engaging with appropriate University-designated Centers and Institutes (i.e. the Innovation Institute, Center for Urban Education) to cultivate strategic, mutually beneficial partnerships. No such environmental scan has been undertaken by the ULS up to this point, and this report will assist the ULS in identifying University designated Centers and</p>	<p>Development of a framework for engaging with University-designated Centers and Institutes to cultivate strategic partnerships in the future and expand upon current partnerships. At least one new partnership should be initialized this FY.</p>

Institutes that are currently without liaisons or other direct ULS contacts.	
------------------------------------------------------------------------------	--

<b>Institution-Wide Strategic Plan Goal: Build Foundational Strength</b> <b>Strategy 1: Create supportive and productive work environment</b>  <b>ULS Goal: Top Value</b> <ul style="list-style-type: none"> <li>Sustain our organizational commitment to efficiency through careful planning, assessing, and partnering. Demonstrate the value and expertise we add to the teaching and research endeavors of the University and seek opportunities and resources to support our ongoing efforts.</li> </ul>	
ULS Strategic Actions	Measurable Outcomes
1. A robust customer service training program, organized around a clearly articulated service philosophy and informed by a review of best practice recommendations, is proposed. The training program will aim to enhance existing ULS customer service policy and practices, encourage meaningful interactions, ensure consistency of service, and increase patron connections to resources or services.	Implementation of a training program, its rollout before the end of FY, and at least 60% of relevant staff completing the training.  Post-training assessment will be developed to measure the attainment of stated goals.
2. Creation of a Hillman Renovation Coordination Group to provide overall coordination of the changes, disruptions, and relocations of people and services during the Hillman renovation period. It is expected that this group will liaise with the existing materials movement group.	Group in place by end of Q1 FY18

<b>Institution-Wide Strategic Plan Goal: Strengthen Communities and Build Foundational Strength</b> <b>Strategy 2: Transform information infrastructure</b>  <b>ULS Goal: Top Value</b> <ul style="list-style-type: none"> <li>Sustain our organizational commitment to efficiency through careful planning, assessing, and partnering. Demonstrate the value and expertise we add to the teaching and research endeavors of the University and seek opportunities and resources to support our ongoing efforts.</li> </ul>	
ULS Strategic Actions	Measurable Outcomes

<p>1. Investigate, report on, and improve the user experience with the processes for requesting materials not held in ULS libraries on campus (e.g. requesting from storage and interlibrary loans).</p>	<p>Usability testing pre- and post-changes with revised system showing at least a 10% improvement in usability.</p>
----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	---------------------------------------------------------------------------------------------------------------------