Credo

R2 believes in libraries and their missions

R2 believes that libraries can and must do their work more effectively

R2 believes that libraries need to reinvent themselves to compete at Web scale

R2 believes that libraries must strike a balance between their historical role and their evolving role
R2 believes that libraries must find new capacity from within their existing resources.

R2 believes that libraries must shift staff efforts from print to digital, and from common to unique materials.

R2 believes that libraries exist to bring value to their host institutions and their users.
R2 believes that every library is different, and must be managed accordingly.

R2 believes that every library can improve its performance.

R2 believes that our techniques can help many libraries.

R2 believes in libraries and their missions.
Our Charge

“... to offer specific and implementable ideas intended to help the Wilfrid Laurier University Library become “a library of the 21st century.”
Our Charge

“the goal for this review is more transformative in nature.
The Library is seeking assistance in creating a more creative, flexible, organizational structure, to an organization focused on engagement in teaching and learning, and in the development and use of scholarship.

library services that demonstrate value in support of University outcomes.”
R2 Methodology – Phase One
R2 Methodology – Phase Two
Five Steps of Workflow Redesign

1. Understand the current environment
2. Identify best “possible” practices
3. Demonstrate the benefits
4. Enable the organization
5. Adjust and implement changes
Contents of the R2 Report

I. Introduction and Executive Summary
II. Laurier Library Strengths
III. Organizational Culture and Structure
IV. WLUL in the 21st Century
V. Electronic Resources: The Invisible Mainstream
VI. A New Approach to Cataloguing
VII. Optimizing Workflows for Print Monographs
VIII. Special Collections and Archives
Headlines

• One of the most unusual and interesting situations in 100 such projects

• Individual efforts and ideas proliferate, but not well-coordinated

• WLUL’s future is understood in too many different ways
Headlines

• Independence can lead to innovation:
  • Instructional Technology
  • Online tutorials
  • Digital initiatives
  • Institutional repository

• Independence can support tradition
  • Face-to-face reference
  • High standards for cataloguing
Headlines

• Flat organization and collective agreements render all opinions equal

• Collaborative efforts rely on persuasion

• When issues are contentious, UL intervenes or individuals handle independently
Vision is Necessary

• No *shared vision* exists of the Library’s users, services, and role in WLU community

• Organization not aligned in support of a single comprehensive strategy

• Missed or delayed opportunities
Management is Necessary

- A host of good individual efforts does not necessarily add up to a good library.

- Priorities must be established, focus articulated, participation mandated.
LAURIER STRENGTHS
Strengths

• Dedicated librarians and staff who aspire to a high level of service

• Staff-level employees spend significant hours on the Information Desk

• Successful harmonization of circulation policies among TUG
Strengths

• Varied forms of user interaction: roving reference, chat, online tutorials, F2F instruction, mobile

• Technology in Instruction Group
  • 18 online tutorials
  • 8,805 views in first year

• 14 Class Guides, built in Drupal Views, implemented in Brantford
Strengths

- First-Year Instruction Project focuses on student retention, a University priority

- ScholarsCommons@Laurier: 800 ETD, policies finalized, good communication.
  - Canadian Military History: collaboration with Press
  - The Cord back runs
  - Open Access articles by WLU faculty
  - Student workers used to find OA articles & prepare metadata
  - Coordinator position is split between Library and Press
Strengths

• Regular inventories and shelf-reading

• Disciplined approach to deselection and stacks management

• Shared workloads with TUG, OCUL

• Shared systems within TUG
Strengths

- High level of vendor consolidation for books and serials
- Most book selection done electronically, supported by batch processing
- Serials associates spend 75% of time working in SFX
Strengths

• Electronic invoicing and pre-assigned fund codes

• Voyager/Banner interface

• Cataloguing use of MarcEdit, macros, and third-party services to manage and customize batches of records
Strengths

• Web site being completely redesigned for 2012

• Implementation of SUSHI for automated harvesting of usage statistics

• Locally-adapted script automatically updates configuration file for proxy server
Strengths

• Archives & Special Collection now focused on “more product, less process”

• Recently re-drafted ASC collections policy focuses tightly on:
  • Environment
  • History of Lutheranism in Canada
  • History of Kitchener-Waterloo
Should anything change?
Remember!

• These are just recommendations
• There will be changes
• An implementation plan is needed
• Moving target
WLUL IN THE 21ST CENTURY
Three Key Realities

• Library and learning activity will be increasingly virtual

• Library resources and services must become integrated into user workflows

• Radical collaboration with consortial and campus partners will improve services and control costs
The Physical Front Door

- Turnstile count: 532,312
- Reference Transactions: 17,024
- F2F Instruction sessions: 195
- F2F Instruction participants: 9,814
The Virtual Front Door

Dashboard

Aug 31, 2010 - Aug 31, 2011
Comparing to: Site

Site Usage

- 775,879 Visits
- 2,540,512 Pageviews
- 3.27 Pages/Visit
- 37.62% Bounce Rate
- 00:03:15 Avg. Time on Site
- 21.68% % New Visits

Visitors Overview

Map Overlay
The Virtual Front Door

- 17,359,000 database & catalogue searches
- 435,000 full-text downloads
- While the Library’s visible front door remains busy, the virtual front door is far busier and growing more rapidly
Online Tutorials

Finding Books & Book Reviews

• Finding Books: Primo Basics (4:46)
  Basics on finding books, refining search results, and using the e-shelf to print, save, and e-mail results.
• Finding Electronic Books (2:36)
  How to find electronic books in Primo and on the Library’s web site.
• Primo Central: One Stop for Searching Books and Articles (3:24)
  Searching for books and articles at the same time using Primo Central.
• Requesting Books from Other Libraries in Primo (2:17)
  Request delivery of books from Guelph, Waterloo, or other Laurier campuses for pick-up at your library.
• Requesting Interlibrary Loans (2:56)
  Learn how to order items from RACER, our interlibrary loan system.
• Finding Book Reviews (2:56)
  Learn how to find and use the Library's resources for book reviews.
• Using Ebrary E-Books (3:38)
  Learn how to use Ebrary e-books.
• Printing from E-Books (2:19)
  Learn how to print from an online book.

Finding Articles & Journals

• Finding an Article When You Know the Title (3:14)
  Quickly access single journal articles when you have the title of the article and journal name.
• Finding Newspaper Articles (3:19)
  Find out how to locate and use the Library’s newspaper resources.
• Finding Peer-Reviewed Articles (3:08)
  Learn how to search for and limit your results to peer-reviewed journal articles in different databases.
• Connecting to Library Resources using Google Scholar (2:45)
  Learn how to set preferences in Google Scholar to access Laurier Library materials.
• Primo Central: One Stop for Searching Books and Articles (3:24)
  Searching for books and articles at the same time using Primo Central.

• 18 tutorials launched in FY11

• Viewed 8,505 times by 7,619 users

• Limited promotion
Collection Use

Print/Tangible

- Circ: 125,726
- Waterloo circulation declined 24% between FY05 and FY10
- ILL lending declined 28.3%
- ILL borrowing declined 45.9%
- In-house use 55.2% lower than FY04

Electronic

- Full-text downloads: 435,107
- 75% of materials budget and growing
Online Services

• The majority of users must be met and served online.

• Resources must be optimized for self-service.

• Creative use of technology needed to extend the range of F2F transactions.
Recommendations

• Continue to emphasize and improve Web access

• Dedicate 60-70% of librarian and staff hours to e-content and virtual services

• Continue to extend and tune discovery
  • Primo/Primo Central
  • Google Scholar/Wikipedia
  • MyLearningSpace
Recommendations

• Make outreach, instruction, and liaison services more consistent across disciplines
  • Standard minimum expectations
  • Named & pictured liaison on every D2L course page
  • Subject librarians present at all departmental meetings
  • Written description of responsibilities

• Increase number & variety of online tutorials
  • Enable effective self-service
  • Content and design expertise both needed
  • High maintenance but high leverage
Recommendations

- **Invest in video-conferencing infrastructure**
  - Increase yield of instruction sessions
  - Broadcast and record live sessions
  - Adobe Connect for screen-sharing & audio
  - Brantford, Kitchener, Waterloo
  - Separate infrastructure for staff communication

- **Optimize Library presence in D2L**
  - Get into the undergrad/faculty workflow
  - Integrate E-reserves, Subject Guides, Class Guides
  - More consistency
  - Address D2L limit on URL length
  - Consider LibGuides
Using ARTstor in MyLearningSpace - Instructions for Faculty

This webpage outlines four ways for faculty to use ARTstor images in MyLearningSpace courses. Click on a title for detailed instructions; instructions assume some familiarity with using ARTstor. For assistance please contact Diane Peters.

Reference File of Images with Data and Notes

- Suitable for Content Pages and Assignments
- Faculty must be ARTstor registered users

Shared Folders in ARTstor

- Suitable for Content Pages and Assignments - students can save images to their own groups, and add notes to images for reference as they work
- Faculty must be ARTstor registered users with Instructor Privileges
- Students must be registered users
- Links for instructions to students are provided for faculty to add on their course pages

Link (URL) to a Single Image or an Image Group with ARTstor Image Viewer

- Image(s) will open in the ARTstor Image Viewer, with zoom, pan, data, print and save functions
- Suitable for Content Pages and Assignments
- Faculty must be ARTstor registered users for image groups only
- Students don't need to be registered users to view images if faculty create off-campus links.
Next Steps

Welcome

Welcome to the UW-La Crosse Example Course!

While you are visiting try:

- Taking a Quiz
- Visiting the Content and Links areas
- Posting a message in the Discussion area
- Submitting a file to the Dropbox
- Checking the Grades Section

If you have any questions about using the example course contact the ITS Support Center at (608) 785-8774 or itsupport@uwla.edu.

Library Resources

- Murphy Library Home
- Ask a Librarian
- E-Reserves
- Find Books
- Find Articles
- Subject Resources

File Viewers

Many courses in Desire2Learn contain files created with Microsoft Office or in PDF format. Below are links to free downloadable viewers for each of these files.
Even Better
Recommendations

• Explore data support and curation services

• Continue to grow digital publishing and scholarly communication services

• Establish a campus-wide role for the Library in copyright expertise
Consider...

- Re-aligning Library and Learning Services
- Closer alignment of Library and ICT
- Consolidating Information and Circulation Desks at Waterloo
Explore ‘radical collaboration’ in TUG

• Implement a single TUG approval plan for print books.

• Implement a shared approach to individually purchased eBooks.

• Accelerate deselection and shared management of print books
Explore ‘radical collaboration’ in TUG

- Reconceive an expanded Annex as the TUG Distribution Centre

- Consider a TUG collaborative collections and technical services organization.

- Are collections any longer a competitive factor? Or are they infrastructure?
Electronic Resources

are the mainstream
WLU E-Resources

• 27,648 unique e-journals; 268 databases
• 228,223 eBooks
• 75% of materials budget
  • 50% of this to CRKN
  • 25% to OCUL
  • 25% direct
• Shared workloads for licensing, maintenance
Distributed effort: 4-5 FTE total

- Head of Collections
- Electronic Resources Librarian
- Acquisitions Manager
- IR Committee
- Serials Associates
- Acquisitions Associates
- Cataloguing Librarian
- Systems staff (proxy and web support)
- Information Desk staff
Tool Time

- SFX 4 (link maintenance, title activation, A-Z)
- Voyager (links, cataloguing, financial, bulk import, discovery)
- Drupal (generate resource pages, A-Z for databases)
- EZProxy (off-campus access)
- Primo (discovery, indexing of some resources)
- Excel (financial, package tracking, accrual adjustments)
- MS Access (package tracking, usage statistics)
Tool Time

- U-Stat (usage statistics)
- OUB/LIM (OCUL-based rights & license tracking that feed SFX)
- ejournals@wlu.ca (email trouble-shooting list)
- Print files (for originals of signed licenses, etc)
- MARCit! (records for eBooks and e-journals)
- Publisher/Provider MARC record (catalogue, Primo)
- Probably others
Recommendations

• Recognize e-resources as the mainstream workflow
• Establish a dedicated E-Resources Management department
• Make strategic decisions about e-resource discovery and access
• Stop entering financial data for e-resources into Voyager
• Monitor evolving support from CRKN (named packages)
• Address problems with the Link Checker
• Increase systemization for reporting access problems
• Train cataloguing associates to work with e-resources
ORGANIZATIONAL CULTURE AND STRUCTURE
Library Organizations

- Designed to accommodate requirements of the print era
- Lack strong project management skills
- Fail to make timely decisions
- Are inexperienced with setting production goals, standards, benchmarks
- Do not regularly measure performance
- Have not been expected to analyze costs
- Fail to inspire confidence and enthusiasm
WLUL Culture

• The collective agreements are generally understood to preclude strong management. Operational and project management are underdeveloped and undervalued.

• There are no performance evaluations at the individual or the departmental level.

• Inadequate attention is paid to instructional outcomes, quality control, progress toward shared goals.

• There is little expectation that professionals can be required to conform to new requirements, behaviors, priorities, or strategic directions.
Cultural Concerns

- Some paraprofessional work is being performed by MLS librarians.
- A good number of talented and experienced and paraprofessionals are underutilized.
- Work is distributed unevenly. Not everyone is busy.
- In comparison to other academic libraries, few students are employed by WLUL.
Structural Concerns

• The UL and the Head of Access Services have too many direct reports

• The AUL positions are underutilized

• Head of Collection Development has been seconded

• Acquisitions and Cataloguing functions report through two different divisions.

• The library’s committee structure is large and unwieldy. Fundamental library functions are handled by committees rather than operational departments.
Staffing Concerns

- Staffing patterns and internal expertise continue to favor print operations.
- There is no strategic plan in place for managing the anticipated growth of library services and facilities.
- Responsibilities for acquiring and maintaining e-resources are too highly dispersed.
- Processing backlogs are building with regard to Archival collections.
- Certain functions are “misplaced.”
Recommendations

- Reinterpret the collective agreements – promote stronger management.
- Establish minimum expectations for librarians and staff.
- Establish standard approaches for routine tasks and expect conformance.
- Implement regular performance evaluations.
- Adopt shared priorities; develop operational and strategic benchmarks; measure quality and outcomes.
- Consider a management training program.
Recommendations

• Adopt a more hierarchical administrative model
• Strengthen the role of AUL
• Expand the number of AULs from 2 to 3.
• Establish and staff three operational divisions with an AUL providing leadership and oversight for each.
no perfect model
Desk Services and Collections Management

Circulation and Information Services
E-Resources Management and Cataloguing
Acquisitions, ILL, and Document Delivery
Inventory Control

Collection Development, Outreach, and Instruction
Collection Development
Scholarly Communications and Institutional Repository
Web Content and Design
Research Support
Instruction and Instructional Technology
Archives and Special Collections

Administrative Services
Budget and Finance
HR and Training
Digital Initiatives/LIST
Strategic Planning and Project Management
Reception
Facilities
Brantford Library and Campus Relations
Milton Library and Campus Relations
<table>
<thead>
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<th>Desk Services and Collections Management</th>
<th>Collection Development, Outreach, and Instruction</th>
<th>Administrative Services</th>
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</table>
Recommendations

- Define and fill a new librarian position dedicated to Collection Development
- Assign two cataloguing associates to Special Collections and Archives.
- Streamline committees and committee processes
- Promote the most competent staff members to supervisory positions.
WORKFLOWS AND OPERATIONAL PRIORITY
Take a new approach to cataloguing

- Acknowledge user search behaviors
- Recognize that the next generation of library OPACs will be cloud-based
- Take fuller advantage of available copy
- Accept duplicate call numbers
- Catalogue only to the level needed
- Train cataloguing associates to work with non-MARC schemas
- Implement a rigorous program of quality control
- Relax permissions for specific cataloguing functions and catalogue maintenance for weeding projects
Take fuller advantage of automation for new monographs.

Contract with YBP to provide them shelf-ready.
Eliminate manual intervention and offline processes

- Eliminate the BY-PASS routine for YBP orders that duplicate TUG holdings
- Use a GOBI selection folder to store and track recommended” titles
- Eliminate manual entry of PO prefixes
- Eliminate manual duplicate-checking routines
- Stop double-checking YBP status reports for OP and OSI
- Eliminate manual counts of exported GOBI records
Collection Development and Management Recommendations

• Eliminate the weeding backlog
• Be prepared to move books from the Waterloo location to Brantford
• Stop accepting donated books for the general collection
• Analyze the ROI with regard to Better World Books
• Implement a rules-based approach to binding and repair

• Consider virtual approval plans and patron-driven acquisitions
• Simplify the fund structure
Special Collections and Archives

• Strictly define the scope of these collections
• Continue to reduce the cost of processing archival materials
• Choose appropriate descriptive standards
• Invest in a storage/data management system – designed for archival materials
• Ensure permanent access to WLU digital objects
Remember!

- These are just recommendations
- Don’t make any changes today
- Engage in the conversation
- Imagine your own evolving role
- Next steps
Next Steps

- R2 Report will be available on the intranet today
  - email with link will be sent to libinfo*

- Feedback – group discussions
  - 3 sessions in person sessions for feedback

- Feedback – anonymous
  - online form that generates anonymous email
  - email with dates & link will be sent to libinfo*

* all emails will be sent out after 3pm today
Thank You!