

Maureen and Mike
Mansfield Library
UNIVERSITY OF MONTANA

Building the Future

First-year Implementation Report, 2014-2015



University of Montana

Maureen and Mike Mansfield Library Strategic Plan, 2014-2017

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Introduction

Change in academic libraries is ever-present due to dramatic forces such as technological advances, evolution in scholarly publishing, global education/research, changing demographics of students, and the economics of higher education. These changes require the Mansfield Library to adapt to evolving environments continuously in order to provide students, faculty, and other stakeholders with the most advanced access to information and information-related services.

As part of this evolution, the Mansfield Library has developed "[Building the Future: The Mansfield Library Strategic Plan 2014-2017](http://www.lib.umt.edu/about/strategic-planning/Final_strategic_plan_brochure_5_23_14_0.pdf)," at http://www.lib.umt.edu/about/strategic-planning/Final_strategic_plan_brochure_5_23_14_0.pdf The Plan will direct the library to focus on specific strategic goals and directions to become a more flexible and adaptive library. This plan builds on various library documents, including self-study, the Diversity Plan, and the 2013 ClimateQUAL report and incorporates input from many of the library's stakeholders – students, faculty/researchers, staff, administrators, library personnel, and Mansfield Library affiliates. "[Building the Future](#)" also supports the strategic issues of the University of Montana's "UM 2020: Building a University for the Global Century."

"[Building the Future](#)" is framed by its Mission, Vision, Values, and Guiding Principles and is comprised of five Goals and corresponding Strategic Directions. This plan will guide library administration in setting priorities for finance, personnel, time, and facilities resources in the next three years. Once the plan is implemented, the Mansfield Library will provide ways of assessing progress and the impact on the University of Montana community. Each year the library will revisit the plan to determine progress and to adapt the plan as necessary.

This report includes supporting activities and initiatives to the five strategic goals in the Plan in 2014-2015.

GOALS AND STRATEGIC DIRECTIONS

Goal I: Promote Collaboration *(In support of UM 2020 Strategic Issues 1, 2, 3)*

Strategy 1 Strengthen and build relationships with campus groups

1. Partner with campus groups on grant applications for public programming.
 - a. Submitted grant applications and received a successful Shakespeare Folio grant to host the exhibit in May 2016.
2. Explore offering alumni electronic database access.
 - a. Coordinated trial databases for alumni access.
3. Offer a short formal tour of the Missoula College Library on Veterans' Upward Bound orientation night.
 - a. The planned tour was completed.
4. Implement a campus records retention schedule; reach out to campus departments to collect UM records with long-term historical value.
 - a. Records schedule was approved by Montana University System legal counsel.
 - b. Completed transfer of Registrar's Office historic records to the Archives in June 2015, working with two other departments to transfer permanent records by 2017.
5. Increase system communication and service offerings to affiliate campus libraries.

Strategy 2 Increase collaboration/coordination with other campus IT

1. Coordinate helpdesk services between campus and library.
2. Partner with campus units to coordinate purchasing and establish standard operating software across campus.
3. Expand TechPartners attendance by Information Technology (IT) staff.
4. Work with library systems to ensure circulation supervisors are fully trained and aware of communication routes between campus IT and library IT.
 - a. Working on cross training within the IT training plans.

Strategy 3 Create a Montana Academic Library Consortium/Alliance

1. Secure shared Montana Integrated Library System funding.
2. Explore/increase shared collections across Montana academic libraries.
 - a. Montana Academic Library Consortium (now called Treasure State Academic Information and Library Resources, TRAILS)) established a task force and proposed to create a formal consortium with bylaws and funding options.
3. Develop Montana University System (MUS) statewide information literacy alliance.
 - a. The Montana Information Literacy Alliance has formed a committee to develop plans for the next academic year.
4. Unite collections across Montana's academic libraries by implementing a common discovery platform.

Strategy 4 Explore opportunities to strengthen and develop new relationships with K-12 schools in Montana

1. Connect with instructors of dual-credit courses at Missoula College and orient them to library resources available to them and their students.
 - a. A new pathways and dual credit position has been created at Missoula College to increase awareness and use of library resources.
2. Provide information about Interlibrary Loan (ILL) to Montana school librarians.
 - a. Relevant materials were created and distributed to high school coordinators.
3. Establish and strengthen relationships between Mansfield Library and K-12 school librarians in Montana.
 - a. Worked with Montana Museum of Arts & Culture (MMAC), Montana Children's Theatre (MCT), and Missoula Writing Collaborative to plan school tours of the upcoming Shakespeare Folio exhibit.
 - b. Plans are in place to hire an adjunct librarian with specific responsibility for facilitating outreach to K-12 Librarians. Currently awaiting approval.
4. Explore collaboration with K-12 school librarians in Montana for continuing education.
 - a. Hiring an adjunct librarian to facilitate outreach to K-12 Librarians.

Strategy 5 Strengthen and build relationships with libraries and cultural heritage institutions regionally, nationally, and internationally

1. Develop disaster and emergency plan agreements with library partners and a separate disaster plan for Missoula College Library.
 - a. The Plan was created in June 2015 and approved in July 2015.
2. Develop collaborations with regional libraries to serve the greater Missoula community.
3. Offer joint programs, presentations, and activities with Missoula Public Library Makerspace at Missoula College, targeted to students in the culinary, electronics, and entrepreneurship programs.
4. Develop partnerships and create collaboration with international libraries and colleagues.
5. Complete U.S. Government Printing Office (GPO) cooperative cataloging partnership agreement and explore the possibilities of continuing with additional partnerships.
 - a. Monthly record loads were sent to GPO and they were enhanced, retrieved, and added to OCL (spell out?). Original agreement was met and records for the final 1500 items are available in the Mansfield Library catalog.
6. Formalize networking/sharing meetings of departmental/unit counterparts of regional libraries to exchange ideas, concerns, etc. and/or visit affiliate, MUS and other regional libraries for sharing of ideas.
 - a. Invited Montana University System and regional libraries to a sharing and networking session that occurred in Butte in August 2015.

Goal II: Tell the Library's Story
(In support of UM 2020 Strategic Issues 1, 2, 3, 4)

Strategy 1 Develop and implement an ongoing marketing plan

1. Appoint and charge a marketing team to adapt and implement the Association of College & Research Libraries (ACRL) toolkit for the Mansfield Library.

- a. A marketing task force has met and sent recommendations for a marketing team and strategy to the Dean.
2. Make contributions to library spotlights.
3. Increase the collective utilization of the gaming collection by 20% for the 2014-15 academic year.
 - a. At the beginning of spring semester 2014, promotional advertising cards were placed in the dorms. Circulation data shows a significant increase in use: 2012 = 6; 2013 = 24; 2014 = 58.
 - b. Followed recommendations from the UM Business School students' marketing plan, including more advertising for games, e.g. a Spotlight entry on the web site. Usage for 7/1/14 – 6/30/15 = 57 charges and 21 renewals.

Strategy 2 Enhance web presence

1. Expand the library's social media presence.
2. Establish systematic plan to audit the success of access points of commercial electronic resources and suggest areas of improvement.
3. Produce short videos describing Circulation, Interlibrary Loan and Paw Print services and post them to library social media sites.
 - a. One video was completed highlighting Access Services and posted to the webpage. Another video is in the works to showcase self-serve options in the library.
4. Designate responsibility for website content.
5. Conduct website usability study.
6. Establish regular and systematic reporting of website statistics.
7. Develop capability for systematic gathering of external site statistics.

Strategy 3 Expand outreach, programming, and exhibits

1. Continue offering the Gardeners' Gathering event at Missoula College, and explore soliciting community sponsors.
2. Develop and implement an event centered around culinary arts.
3. Schedule and program national displays.
 - a. The displays and complementary programming events on Harry Potter (from the National Library of Medicine, NLM), Fighting the Fires of Hate (from the U.S. Holocaust Memorial Museum), and Lincoln (from American Library Association) were completed. This included 10 public events with an attendance of 176. Upcoming exhibits include the NLM exhibition on African American Surgeons and the Shakespeare's First Folio exhibition in 2016.
4. Develop local displays and programming in support of campus activities to expand outreach efforts beyond UM campus, including Shakespeare's First Folio, 50th Anniversary of the Wilderness Act, FYRE, The Big Read, and Festival of the Book.
 - a. Displays continue to be posted throughout the year in support of campus activities.
5. Develop campus and community programming series.

Strategy 4 Develop an advocacy plan

1. Appoint and charge an advocacy team to adapt and implement ACRL's advocacy toolkit for the Mansfield Library.

Goal III: Enable Knowledge Creation
(In support of UM 2020 Strategic Issues 2, 3, 4)

Strategy 1 Expand digital curation activities and strategies

1. Advocate for digitization of campus literary journals.
 - a. Digitized *The Oval*, *Cutbank*, and *Montana Journalism Review* in ScholarWorks. Begin a pilot project to systematically create name authority records and researcher identifications through ORCID (Open Researcher and Contributor ID) for active UM faculty researchers.
2. Create a section of the Institutional Repository (IR) for culinary arts students' final portfolios.
 - a. The section of these materials on IR and program will launch in Spring 2016.
3. Create a Digital Curation Working Group to develop digital curation activities and strategies across the library and with external partners, including areas such as digital projects, institutional repository and scholarly communications, data management, and digital preservation.

Strategy 2 Expand resources for and connections with e-learning and e-research

1. Dedicate a minimum of .25 FTE of Bibliographic Management Services (BMS) staff time to support acquisitions & metadata related activities for the Institutional Repository (IR).
 - a. Initial staff training was completed and a number of eligible faculty publications have been added to the IR.
2. Develop a method of crosswalking author supplied metadata from Electronic Theses and Dissertations (ETDs) in ScholarWorks to WorldCat and the Voyager catalog.
 - a. Protocols were developed; testing of load parameters to import in Voyager is underway.
 - b. Data is being successfully harvested and imported into WorldCat on a monthly schedule.
3. Assist campus faculty in creating accessible electronic documents for courses.
 - a. Staff from the units of Interlibrary Loan and Circulation are working with campus groups to create accessible documents.
4. Add digitized local campus media productions and print materials to ScholarWorks.
5. Work with graduate school to develop workflow for deposit of electronic theses directly to ScholarWorks.
 - a. The pilot was completed in 2014; workflow was established in Spring 2015, and the initiation process is now complete.
6. Expand the digital presence for undergraduate research.

Strategy 3 Strengthen and grow information literacy initiatives and practices

1. Develop and implement a flipped classroom model of information literacy instruction by incorporating online learning objects at Missoula College to combat our lack of instruction space.
 - a. Relevant instructional videos were deployed and an evaluation form is being developed.
2. Adapt new ACRL Information Literacy Framework.
 - a. The Library Instruction Group approved a new curriculum based on the ACRL Framework. This curriculum rubric is now posted on the web site.
3. Integrate sustainability and local information into instruction.

- a. This was completed and serves as the groundwork for the integration of the information literacy curriculum into the required first-year courses of WRIT 101 and COMX 101.
4. Develop copyright literacy course for campus.
 - a. An online credit course, LSCI 391, Culture Introduction to Copyright, was offered fall semester 2015 by Professor Tammy Ravas.

Strategy 4 Innovate reference and user services

1. Improve internal online helpdesk for electronic resources (databases, ebooks, and ejournals).
 - a. A prototype in Libguides was developed and the project was completed.
2. Implement new electronic resource management system to be used by staff as a resource management tool.
 - a. In progress; a prototype in Libguides has been developed.
3. Reframe library liaison structure.
 - a. Approved focus on writing courses, first-year experience, online modules, LSCI 200, and a consistent series of workshops. A distributed model of instruction was implemented in Autumn 2015.
4. Establish cross-divisional collaborative training for service points in the Information Center.
 - a. Working document for cross-training implementation was completed.
5. Collaborate with front-line staff to create new models of service and support.

Strategy 5 Enhance discovery, use and preservation of unique, rare or hidden materials

1. Assess government documents paper collection for hidden materials. Provide discovery and access by completing the cataloging of the 15 classes identified as the highest priority.
 - a. Completed 26 class schemes plus two multi-class subject areas (immigration, naturalization, and civil defense). Of the 4,500 cataloging records completed, 60% were previously hidden.
2. Dedicate a minimum of .25 FTE of BMS staff time to support assessing, cataloging and processing campus productions.
 - a. Inventory was completed in June 2015 and the action plan is in progress.
3. Dedicate a minimum of .25 FTE of Archives and Special Collections (A&SC) staff time to further develop organization and access related activities for the physical University Publications (UPUBs) collection maintained by A&SC.
 - a. .25-.50 FTE of Archives Tech time dedicated to UPUBs since November 2014 (100% of goal met)
 - b. Queue of prioritized UPUBs serials to be cataloged given to BMS in December 2014 and the second round selection of prioritized serials will be delivered to BMS in April 2015.
 - c. Created an accurate index / spreadsheet of contents and locations of UPUBs materials within A&SC in April 2015.
 - d. Guide to UPUBs created at series level (overall categories) made available online via NWDA in August 2015.
4. Dedicate a minimum of .18 FTE of BMS staff time to further develop acquisitions and cataloging related activities for the physical University Publications collection maintained by A&SC.

- a. Equivalent time allotted; 14 titles were completed and added to the cataloging system.
5. Identify the oral histories in Archives and Special Collections that have insufficient public access (making them 'hidden') and create online access points.
 - a. Searches on WorldCat and Voyager records were completed for 100% of individual oral history recordings in February 2015.
 - b. Research on copyright and access permissions was completed for 100% of oral history collection in February 2015.
6. Identify unprocessed text and image collections of more than one linear foot at the Archives and Special Collections that have no public access points (making them 'hidden') and create at least one online access point for each.
 - a. Identified new collections lacking collection-level records in May 2015.
 - b. Working to create and submit to Northwest Digital Archives (NWDA) and WorldCat at least 10 collection-level records per quarter from June 2015-July 2017.
7. Identify the Library's analog sound and moving image materials (including archival material and campus productions) which warrant long-term preservation but are at risk of format degradation / obsolescence and create a plan for their preservation.
 - a. Audio-Visual consultant reviewed AV content in A&SC September 2014.
 - b. The AV consultant's report and recommendations completed May 2015.
 - c. Low cost/minimal resource recommendations were implemented December 2015.
8. Create and implement a workflow for ingest and management of born digital materials acquired by A&SC.
 - a. Hardware and software for electronic record ingest were purchased in July 2015 and the born digital workstation computer was purchased and implemented in Autumn 2015.
 - b. Majority of born digital workflow phases up to digital preservation ingest were implemented as of December 2014. Ingest software testing is currently in process for ASC born digital materials.
9. Increase preservation and conservation of library's print published materials, with emphasis on rare and unique materials.
 - a. Provided special treatment for 250 Archives items in FY 2015; similar efforts will be made for 125 items in FY 2016 and 2017.
10. Improve climate control throughout Mansfield Library, especially in areas with unique and rare materials.
11. Implement a review and analysis of general collection materials, seeking out those with a subject focus on Native Americans and transfer to Special Collections.
12. Promote unique government materials.
 - a. Created an Arts of Congress display for Level 1, which is now in progress. Another government document display, Fact & Fiction in the Nuclear Age, which will feature an online component, is in progress.
13. Enhance access for unique, rare, or hidden materials through new discovery systems.
14. Migrate local CONTENTdm collections to Montana Memory Project for greater visibility and exposure.
 - a. CONTENTdm was migrated to Montana Memory Project.
15. Improve library website digital collections pages.
16. Conduct usability studies related to digital collections.

Strategy 6 Develop and enhance collections which document the region, its people and its environment

1. Develop and implement a sustainable, cross-divisional workflow for growing the A&SC digital photo collection.
 - a. Established a pilot workflow test and 220+ new images were added by July 2015; will continue to add material to the collection.
2. Implement an oral history program to capture stories documenting life on campus and in the community and region and make them available online.
 - a. Created a list of campus and community members to interview.
3. Identify digital state documents for inclusion in catalog records.
4. Investigate external funding for large digitization projects that include scholarly context/teaching components.
 - a. Currently researching funding through an EIRE grant project.

Goal IV: Develop Deliberate Physical and Virtual Places
(In support of UM 2020 Strategic Issues 1, 4)

Strategy 1 Create a dynamic online learning environment

1. Develop and test online learning objects in support of a flipped classroom information literacy instruction model at Missoula College.
 - a. Videos were deployed and evaluation forms are being developed.
2. Ensure webpages are accurate and accessible.
 - a. Reviewed web page and established a regular review schedule.
 - b. Will continually monitor and change web pages to present current information.
3. Provide technical infrastructure to online learning environment.

Strategy 2 Solidify a library presence for Missoula College and Bitterroot College campuses

1. Serve as information conduit between Missoula College (MC) administration and library administration during the Missoula College building process.
 - a. Met with the new MC Dean and will now attend MC administrative meetings.
2. Formalize materials delivery process and secure necessary budget for Bitterroot College.
 - a. This is an ongoing project; currently being researched at Bitterroot College.
3. Provide computer/technology resources as required.

Strategy 3 Create an environment in Mansfield Library that is beautiful, inviting, and comfortable

1. Create interactive learning spaces.
2. Develop a facilities plan for all library floors using the principles of universal design.
3. Commit to place-based and culturally reflective design.
4. Develop a component of the facilities plan that is employee-focused and provides effective workspaces.

Strategy 4 Integrate the Learning Commons

1. Strengthen partnership between Missoula College Library and Learning Center at Missoula College by exploring joint programs and space usage.
2. Adapt the listening and viewing area into an integrative learning space.
 - a. The room was repurposed for multiple uses; new furniture was placed in the room.
3. Reconfigure furniture and computers into a learning-friendly environment on Level 3 and other levels.
 - a. One row of computers on Level 3 was relocated to Level 1 with the plan to continue reconfiguring Level 3 computers.

Goal V: Build Organizational Capabilities *(In support of UM 2020 Strategic Issues 1, 4, 5)*

Strategy 1 Improve the organizational structure

1. Review and change the organizational structure as appropriate.
 - a. The Dean appointed a working group that reviewed literature and models of library reorganization. SPOC will meet to brainstorm on the topic.

Strategy 2 Grow new knowledge and skill sets

1. Create a staff development plan that will systematically review/assess and implement personnel assets and identify areas of growth.
2. Work with the Fiscal and Personnel Manager to develop a list of essential and/or desired skill sets for BMS.
3. Evaluate computer literacy skills within BMS.
4. Provide staff training in specific areas, as identified by the list of essential and/or desired skill sets and the evaluation process.
5. Partner with staff to study workflows and better understand how IT could improve operations.
6. Provide Continuing Education (CE) sessions in new technology.

Strategy 3 Create a user-centered culture

1. Implement systematic use of user/usability studies.
2. Integrate service philosophy across service points.
 - a. Working document for cross-training was completed and the focus group continues to meet.
3. Implement LibQUAL Survey.
 - a. Survey was implemented and analysis of findings is underway.