

Shippensburg University
Lehman Library Action Plan 2012

3/11/2009

In spring 2007, Lehman library faculty and staff began a semester long process of developing an action plan that will inform planning and decision-making for the next five years. The plan was developed under the following assumptions:

- Any new addition or substantive changes to the facility are at least 5-7 years into the future;
- Budgets are expected to remain flat or to grow slowly;
- Technology will continue to dramatically change student and faculty expectations and how the library and its resources are used;
- Information literacy is critical to student success;
- The library is expected to remain current, relevant, and the academic heart of the institution; and
- There is much that faculty and staff can do now to address the library's shortcomings in facilities, resources, and services.

Over the years, the library faculty and staff have participated in several attempts to develop a strategic plan. On more than one occasion, faculty and staff have completed an analysis of their strengths, weaknesses, opportunities and threats (SWOT). However, realistic, achievable action steps have never been identified, nor has any timeline ever been established for the completion of goals identified.

To expedite the strategic planning process, the dean reviewed the various SWOT analyses and prepared summaries for the faculty and staff to review. Items were added or clarified at the faculty and staff retreats. The final SWOT analysis is located in the appendix.

Upon review at retreats, the faculty identified 6 goals or areas that need attention; the staff independently identified 5 of the same 6 goals identified by faculty (exception: customer service): They include:

Facilities
Resources
Organizational Structure
Budget issues
Assessment
Customer service

The Lehman Library facility is significantly outdated and both the faculty and staff spent considerable time rethinking the current layout and design. Both groups worked independently but arrived at remarkably similar conclusions. While there is no doubt that the library is in need of a major facelift and a new design must remain in its future, the vision proposed for the library in 2012 does not require a new addition or extensive renovation. Much can be accomplished by using the current space in new and innovative ways. Both faculty and staff

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identified the first critical step in this process as a significant weeding of outdated materials. The reduction of outdated materials will free space for the changes envisioned. The proposed changes to the first, upper and lower levels are located in the appendix.

The action plan follows. It includes the mission, goals, vision, steps/tasks necessary, persons responsible and timeline. The action plan will serve as a tool to document progress and to note the status of each task. The Action Plan is a working document and, as such, it will be updated regularly and it will be included as an agenda item for both faculty and staff at least once each semester. Everyone is ultimately responsible for the success of the plan.

Plan adopted at library-wide retreat: May 10, 2007

***Mission Statement:* Our mission is serve the Shippensburg University community by providing excellent reference and research assistance, access to high quality electronic and print collections, customized information literacy instruction, comfortable individual and collaborative study space and effective distance, interlibrary, and outreach services.**

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Mission Statement: Our mission is serve the Shippensburg University community by providing excellent reference and research assistance, access to high quality electronic and print collections, customized information literacy instruction, comfortable individual and collaborative study space and effective distance, interlibrary, and outreach services.

Goal	Vision	Steps/Tasks	Who?	Due	Status
Facilities/Design	<i>Improved people and study space. An up-to-date facility better suited to meet faculty and student needs in the 21st century</i>	Work with facilities to complete Starbucks	Dean	8/13/07	
		Re-envision space: Main Level (people space); Upper Level (Quiet Space); Lower Level (Work Space): See appendix	All	May 10	
		Plan Weeding project to create space for new design	Committee: Barb, Chair Signe, Aaron, Mary, Chantana, Mel	4/15/07	Completed
		Send representatives to Williamsport Program The Wow and the How: Topics and Trends in Library Interiors	Barb, Signe, Kirk, Facilities representative	4/27/07	Completed
		Share Weeding project with AA Council, Cabinet and Forum	Dean	5/1/07	Completed
		Initiate Weeding Project	Committee/staff	6/06/07	
		Complete Weeding Project		5/14/09	
		Work with campus administrators to explore/provide additional Starbucks seating	Dean	Summer 07	
		Redesign the circulation area (phased approach)	Dean/Mary/Lance Consultants	Summer 07	
		Clutter Reduction committee (suggestion from Wow and How)	Kirk – Chair Berk, Joyce, Sue, Mel	May 30	

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Goal	Vision	Steps/Tasks	Who?	Do	Status
Resources	<i>A viable up-to-date collection with few holes</i>	Identify status of current collection – weeding project: See approved plan (appendix) Ensure issues resolved (depreciable assets)	Committee/staff Barb	Summer 07 Summer 07	
	<i>Includes databases relevant to curricula areas, core journals, relevant multi-media and supportive reference materials</i>	Begin Weeding project	Assigned staff/faculty	6/6/07	
		Plan for a permanent/standing library advisory committee (internal) to meet each semester: See appendix for membership	Berk, Doug, Aaron	4/13/07	Completed
		Gain approval for internal Library Advisory Committee	Dean	4/30/07	Completed
		Meeting of Internal Advisory Committee (tentative name: University Library Committee -- ULC)	Dean to schedule	Fall 07	
		Complete Weeding Project	Assigned staff/faculty	May 2009	
		Information Commons Task Force -- assigned to rethink area and make recommendations	Aaron – chair Michael Anderson, Berk, Kirk, Mike Y., Doug, Shelly	August 07	
		Develop a print and electronic serials management project	Barb – Chair, Aaron, Kirk, Joyce, Signe, Chantana, Kathy, Karen T., Laurie	September 07	

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Goal	Vision	Steps/Tasks	Who?	Due	Status
Organizational Structure	<i>Pursue reporting line to the provost, explore and develop a more effective and efficient organizational structure and develop a higher profile on campus</i>	Bring access services and references services closer (use Tech services model) -- recommendations	Access Services committee	December 07	
		Develop Job Description for an Associate Dean	Berk – chair, Doug, Shelly, Mary, Aaron, Mike Gardner or Mike Y., Kathy, Barb	June 15, 07	
		Schedule a library wide meeting with the President in the fall. Topic: How can the library help SU improve our performance?	Dean	December 07	
		Develop and initiate a marketing campaign?	Access Services committee	December 07	

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Goal	Vision	Steps/Tasks	Who?	Due	Status
Customer Service	<i>Satisfied Customers</i>	Charge to Access Services committee Review Polices and procedures/goals in circulation (Access services), reference, archives, information technology, service delivery. What can we do better?	Berk --chair; Mary, Sue, Signe, Doug, Mel, Joyce Diane, Hope, Theresa, Instructional librarian and Tech person	Form committee May 10 Recommendations Due December 07	
	<i>Proactive versus reactive, flexible and fair – a vision of service beyond the rules. The lobby should become a service area</i>	Review Lib-Qual results	Doug	Summary and proposal due May 4	Completed
		Share Lib-Qual results with all	Retreat	May 10	
		Revisit plans/procedures for document delivery/microfile/fiche/scanner/ printer issues	Committee	December 07	
		Recommend training as need indicates (revisit Myers/Briggs)	Committee	December 07	
		Develop regular on-going library-wide training plan/program (bi-annually)	Committee	May 08	

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Goal	Vision	Steps/Tasks	Who?	Due	Status
Budget	<i>Understanding of the process at all levels</i>	Send budget and narrative annually to all faculty and staff for their review	Dean	April 2007	Completed
	<i>The budget should be flexible and support or grow all dimensions of the library and the collection as well as professional development of librarians and staff. It should also include promotion of the library services, including events and exhibitions. The case must regularly be made for increased support</i>	Solicit faculty and staff input for priorities and a “wish list” each December/January <ul style="list-style-type: none"> • In-house plans for each area • Incorporate Public/Access and IT groups into budget recommendation process • Program review preparation 	All Committee: Aaron --Chair Mike Y., Shelly, Doug. Mary. Joyce, Dean	January 08 March 08	
		Advocate/Plan for increased library support Making the case	Dean		
		Initiate and manage Friends of the library program (FOL)	Dean – Chair Foundation, Kathy, Cindy, Barb, Karen	May 07	On-going
		Work with the Foundation to organize an External Advisory Council	Foundation, Dean, faculty and staff	April-May 07 First meeting Fall 07	Begun
		Gain approval for and initiate Internal Advisory Council (ULC) <ul style="list-style-type: none"> • Share information about comparable institutions • Share Lib-Qual results • Represent the library’s interests with administration 	Dean, faculty and staff	First meeting- fall 07	
		Dean meet regularly with Foundation representative	Dean	On-going	

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		Meet with the President: Topic – How can the library help Shippensburg improve performance?	Dean	Fall 07	
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		<ul style="list-style-type: none"> Results of the meeting with the President 			
		Develop a library-wide assessment plan to include quantitative and qualitative data (focus groups and interviews)	Committee	Spring 08	
		Committee to prepare meaningful, robust annual report (including a narrative) through the dean	Committee	May 08 (and annually)	

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Appendix

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SWOT Analysis
Spring, 2007

Introduction

The faculty and staff of Lehman Library have conducted several SWOT analyses over the years. In the effort to move beyond the simple analyses to the development of a 5 year action plan that includes goals and assessment for 2012, four retreats were conducted with faculty and staff in spring 2007. (Faculty: February 2 and March 30 and April 13; Staff: March 9). Previously identified Strengths, Weaknesses, Opportunities and Threats were reviewed for accuracy and currency; relevant additions/changes were made and Strengths and Weaknesses were focused into 5 major areas:

1. Facilities
2. Staffing
3. Resources: Equipment
4. Resources: Collections/Information
5. Programs and Services

Every faculty and staff member was given dots and asked to identify their 5 top areas of concern. Staff additions to the SWOT analysis are identified in red; both faculty and staff priorities are listed by the number of dots noted – faculty in black – staff in red. The areas receiving the largest number of dots form the basis of the action plan.

OPPORTUNITIES

New President
New Dean
Advisory Committee
Extended Studies
New classroom (205)
Revisiting reporting structure
Media-IDDS
Retirements
Organization and services
Integration of Blackboard and library services
Weeding
SBDC (Small Business Development Center)
Accreditation
New Recreation Center

THREATS

Budget (8 dots)
Encroaching Space Claims (4 dots)
ITS need for security vs. dept. need for service

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Publishers

Declining student enrollments and quality

FACILITIES

Strengths

Central Location (lends self to activity – to meet others)

Possibilities of a wide variety of activities in spaces (205, 120 A/B)

Learning Center is here

Starbucks

Proximity to Luhrs

Laptops

InfoTech Courtyard

Weaknesses (* mentioned in LibQual)

Layout/Design (7 dots) (2 dots)

Power outlets

HVAC (2 dots)

Confusing arrangements (6 dots)

*Lack of Study space (individual, group, no whiteboards) (1 dot)

*Not inviting

*Noise

Faculty and Staff privacy (few private offices)

Little comfortable furniture (3 dots)

Worn/mismatched carpeting (1 dot)

106 Lab space and 120 A/B space effectiveness (no doors)

Laptops (when in lab use, out of circulation; password management)

InfoTech courtyard (2 dots) – quiet space needed

Poorly designed service points

Signage

Restrooms

Safety issues – (downstairs exits; fire suppression)

Faculty study rooms (functionality issues)

STAFFING

Strengths

Well qualified

Reputable

Involved

Faculty matters

Articulate

Service oriented

Longevity and experience

Open doors

Weaknesses

Lack of access to professional development (budget issues for travel and tech training) (6 dots)

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Staffing issues (management, scheduling issues resulting)

Organizational Structure (7 dots)

Fiscal control (Budgeting and poor planning process)

Faculty/staff relationship (3 dots)

Consistent enforcement of policies and rules for all (3 dots)

Classification of positions

3. RESOURCES: EQUIPMENT

Strengths

Laptops

3 smart classrooms

Desktop equipment

ILLiad

Electronic Reserves

Weaknesses

Assessment

Building

Budget (need to see overall picture; maintenance costs; equipment supplies in all areas)
(4 dots) (2 dots)

Journals (Health and science related)

Staff untrained in media equipment use (1 dot)

Outdated equipment (microform; photocopier etc.)

4. RESOURCES: COLLECTIONS/INFORMATION

Strengths

Adequate (barely)

Electronic Resources

KLN

PALCI

Historic Collections in some disciplines

Weaknesses

Policies on collection development (1 dot)

Electronic collections (gaps in some disciplines; control of subject collection subscriptions)

Rethink Tech services (4 dots)

Systems (management of equipment)

Assessment

Outdated books and journals (7 dots) (5 dots)

Fair share of university Budget (5 dots)

OPAC

VRL

U-borrow (constant program issues)

PROGRAMS/SERVICES (* mentioned in LibQual)

Strengths

Instruction (LibQual results)

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References services (virtual and real)
Distance Ed
Web Site
Handouts

Weaknesses

Assessment (1 dot)
Liaisons (1 dot)
Web-Site (ownership and budget) (5 dots)
Reference
Ship to Shore currency
Disaster Recovery (1 dot)
Customer Services (top to bottom, including student workers – Media hours) (5 dots)
Education/Training needed
Organizational Structure (3 dots)
Tech support for students
Dispersion of related collections ((Luhrs)
Policies
Free Printing (wasteful)
Information sharing with students and staff outside the library (TV? Kiosks?) (2 dots)

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Facilities

Main Level (People space)

24 hr. Study Space (new addition?)
All relevant faculty office (together)
Reduce circulation space
Enclose/Expand tech courtyard area
Reference desk more visible (~~straight ahead as enter?~~) **Redesign**
Learning Center
Group study space
New Collections/New Video Area/SU Authors
Display Area
New furniture/Improved layout
Improved library instruction lab

Upper Level (Quiet space)

All General Collections
Quiet Study
Small Faculty Work office redesign –**Combine, move files to different storage area**
YPC Collection (**Luhrs – if space is enlarged**)
205 Archive/Special Collections/Public Study Area/Meeting/**Displays**

Lower Level (Work space)

Redesign of the Technical Services area
Promotion /Tenure storage (Empty office-Collections)
Group study
Periodicals
Gov Docs
Media services – **Storage only (remain in Grove until new addition)**
IDDS (Where LC is)
~~Current collections areas = Media services?~~
Student study rooms where IDDS is currently
Lower level service point

Circulation area (Reduce – change footprint?)

Move Starbucks ancillary area to window
6 foot wall/bookcase to separate from circulation
Create “work room”
New counters and shelving underneath
New desk/work stations

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Weeding Project Announcement
Ezra Lehman Memorial Library
Shippensburg University

Beginning May 2007 the Ezra Lehman Memorial Library will begin weeding the General Collection. The first subject areas to be weeded will include the sciences, medicine, technology, military science, and library/information resources.

It has been many years since materials in the Lehman Library have been reviewed for their accuracy, authoritativeness, curricular value, and condition. Responses from the recently conducted LibQual survey indicated that faculty and students are unhappy with the datedness of the collection.

Studies have shown that careful weeding of a collection increases book use and user satisfaction as patrons are able to locate up-to-date and accurate information that relates to their academic needs. In addition, weeding the collection will permit library staff to restore the General Collection to A-Z order (it is currently split with various Library of Congress classes on different levels) and provide much needed space for students and new technologies. Once the initial project is completed, ongoing weeding will be incorporated into the regular maintenance of the collection.

Procedures used in weeding allow for the careful review of library materials. Books are *considered* for de-selection using the following criteria:

- Multiple copies
- Worn or damaged items
 - These items will be evaluated for replacement
- Older or unneeded editions
- Textbooks
- Dated or incorrect information
- Incomplete series
 - These items will be evaluated for completion
- Superfluous materials that do not relate to the mission of the university and library, e.g.
 - Curriculum that is no longer taught
 - Best sellers older than 10 years whose authors are no longer publishing
- Materials that have not circulated in more than 10 years
 - This criterion will be modified to 20 years for some disciplines

Books will not be eligible for de-selection if they are identified as:

- Core materials for each discipline
- Classics in the field
- Literary classics
- Primary sources
- Regional materials

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- Materials authored by Shippensburg University faculty, students and alumni
- Works deemed to be of historical value
- Books that are the “last copy” of a significant title in the Pennsylvania State System of Higher Education

Books that are removed from the stacks will be given a “Circulation Review” status and placed in a designated stack area for evaluation. Titles will be checked against standard collection development tools such as *Resources for College Libraries* and *ChoiceReviewsOnline* to assure that core materials and classics are not inadvertently removed.

In September 2007, departmental faculty will be invited to examine the books selected for review and identify materials they wish to retain. Materials will also be evaluated by library faculty. Additionally, title lists of books, organized by Library of Congress Classification numbers, will be linked to the library’s website for review.

Once materials have been withdrawn from the library’s automated system they will be disposed of in accordance with guidelines provided by the Pennsylvania State System of Higher Education.

If you have questions concerning the weeding project, please contact Barbara Rotz, Collection Management Librarian (bdrotz@ship.edu or ext. 1027).

04-24-07

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Ezra Lehman Memorial Library
Shippensburg University
Planning for Weeding
April 2007

NOTE: Books must remain in LC order throughout the whole process.

A. Criteria & Reports:

- A trial run of Vs (Naval Science) and Zs (Bibliography, Library Science, Information Sources) will be initiated in Spring 2007. [Time Frame for the entire project: V-Z—Spring 2007, Q-U—Summer 2007, A-D—Fall 2007/Spring 2008, E-P—Summer 2008.] General Collection titles in Compact Shelving and Oversize collections will be incorporated into the process.
- Weeding reports will run according to LC class using the following criteria
 - Materials published before 1997 (Note: In some disciplines, this will be modified to an earlier date.)
 - Materials with no circulation statistics
 - All reports will include the following information:
 - Barcode
 - Call number
 - Title
 - Enumeration (volumes, issues, etc.)
 - Publisher date
 - Comments field
 - Header information – page #'s, date
 - Reports will be reviewed by the Access Services supervisor for accuracy

B. Review:

- Access Services staff (and graduate assistants) will perform the following review:
 - Titles will be searched against core lists of academic materials such as *Resources for College Libraries and Choice Reviews Online*. Subject specific guides will be incorporated depending on the discipline being weeded.
 - If materials are included in core lists, the name of the resource (e.g., “RCL” or “CRO”) and the current date will be noted next to the barcode on the book and on the report page in the comments field.
 - Materials listed in core lists and/or guides will be remain in the stacks.

C. First Weed:

- Books will be pulled from the general collection, compact shelving and oversize stacks by Access Services staff and student workers using the review report. Carts will be labeled Side 1 and Side 2 so books can be kept in LC order.
- Students and staff working in the stacks will proceed in the following manner:
 - They will work from top to bottom and left to right.
 - They will indicate that a shelf has been completed by placing a sticker on the shelf

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- If they are interrupted, they will turn down the last book reviewed to indicate where they should begin when they return and mark in pencil on the report.
- When returning to the stacks, they will erase the notation on the report.
 - Missing items will be noted on the report page
 - Items pulled with have **P** noted on the sheet
 - Items not pulled with have **NP** noted on the sheet
- A green dot will be placed beside the barcode and books will be taken directly to Government Documents to the designated area *Circulation Review* shelves.
- Only the first volume of large sets will be pulled and a note placed in it indicating the number of additional volumes in the stacks. A note will be placed in the second volume of the set to indicate the first volume is pulled for Circulation Review.
 - If materials are requested from the Circulation Review shelves for use by a patron, the status of Circulation Review will be removed and the green dot will be covered. When the patron is finished with the material it will be reshelfed in the General Collection.
- Reports will be given to Mary to prepare in order to change the status to *Circulation Review*.
 - Status of missing items on report will be changed to missing in Voyager and these titles deleted from report
 - RCL or CRO titles will be deleted from report
 - Additional volumes designated on the report as not pulled will be deleted from the report.
 - All columns for remaining items will be deleted except the barcodes.
 - Status will be changed to *Circulation Review* using Gary Strawn's location changer software by pulling in the barcodes

C. Second Weed:

- Hope, with Melanie's assistance, will review shelves after the initial weed has been made by student workers. They will identify and tip the following:
 - Badly worn or damaged books.
- Label on shelf will be initialed by Hope or Melanie indicating the shelf had been reviewed.
- Books will be pulled
- Items will be charged to *Repair*
- These items will be shelved in Melanie's office area and will be processed following standard review/replacement procedures for worn or damaged materials.

E. Third Weed:

- Hope, with Melanie's assistance, will review shelves after second weed. They will identify and tip the following"
 - Multiple copies – rubber band together
 - Early editions of the same title
 - Series with missing volumes
 - Textbooks

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- Label on shelf will be initialed by Hope or Melanie indicating the shelf had been reviewed
- Books will be pulled.
- Item status will be changed to *Cataloging Review*
- These items will be shelved in Tech Services and will be processed following standard review procedures for multiple, outdated or incomplete materials.

F. Shelfreading:

- Once materials are pulled from the designated LC classes, the remaining materials will be shelf read.
- Items that are out of place will be brought back to the Circulation Department. They will be browsed, the weed/missing/lost lists will be checked and standard procedures followed if item appears on list.

G. Campus Notification (for materials processed during Spring and Summer 2007):

- At the end of Term V reports will be generated by LC class and links to these reports will be posted on library's home page.
- The campus will be notified that materials are available for review via a Library alert and FACT.
- Materials will be available for review during the month of September.
- Library liaisons will review materials and select items for potential retention using the procedures listed below.
- Faculty reviewing materials will be asked to fill out a form providing their name, department, and reason to retain. The form will be placed in the book and the book will be tipped on the shelf.
 - Tipped materials will be placed on book trucks for review by library faculty.
- Following the review period, the Cataloging Department will delete bibliographic records for materials remaining on the shelves and process materials for discard.

H. Final Steps:

- After books have been deleted in the system and books not being discarded are returned to shelves, minor shifting will take place.
- After all discards are deleted from system (2009), another report will be run to check for those not found initially. If still missing, they will be deleted from the system.

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University Library Committee (ULC)

PURPOSE: To advise the library in regards to budget, services, collections, and programs. To promote library support in general.

DUTIES:

- Review and react to library budget
- Discuss and advise on the direction and emphasis of library collections (print and electronic)
- Offer suggestions for library programs and outreach activities that can better support the students and faculty
- Help inform campus community of library strengths and needs

MEMBERSHIP (14):

- Dean of Library and Media Services (Chair of committee)
- Dean of Academic Programs and Services
- Dean of Arts and Sciences
- Dean of Education and Human Services
- Dean of Grove College of Business
- One faculty member appointed by each of the college councils (4)
- Library Department Chairperson
- One librarian at large
- One APSCUF representative
- One undergraduate student
- One graduate student

MEETINGS:

Once per semester, or more if needed