



The David and Lorraine Cheng Library

Strategic Plan, 2013-2019



William Paterson University of New Jersey

August 1, 2013

Introduction

The David and Lorraine Cheng Library has a strong tradition of long range planning, dating back to the 1970s. While in large measure the early plans grappled with the challenges and opportunities of replacing traditional workflows with automated techniques, they also set forth important principles of excellence in library service and collections that have served as guideposts for library staff for decades.

This expression of the Cheng Library’s mission, vision, values and goals builds upon its predecessors, but within a 21st century context. Technology is no longer viewed as a novelty; rather, it is considered a natural and necessary component of every aspect of the Library’s workflow, resources and services. Library materials are now “acquired” in many ways beyond traditional purchasing, such as by lease, and they arrive in formats not yet invented just 30 years ago. Moreover, countless additional valuable resources are freely available on the Internet.

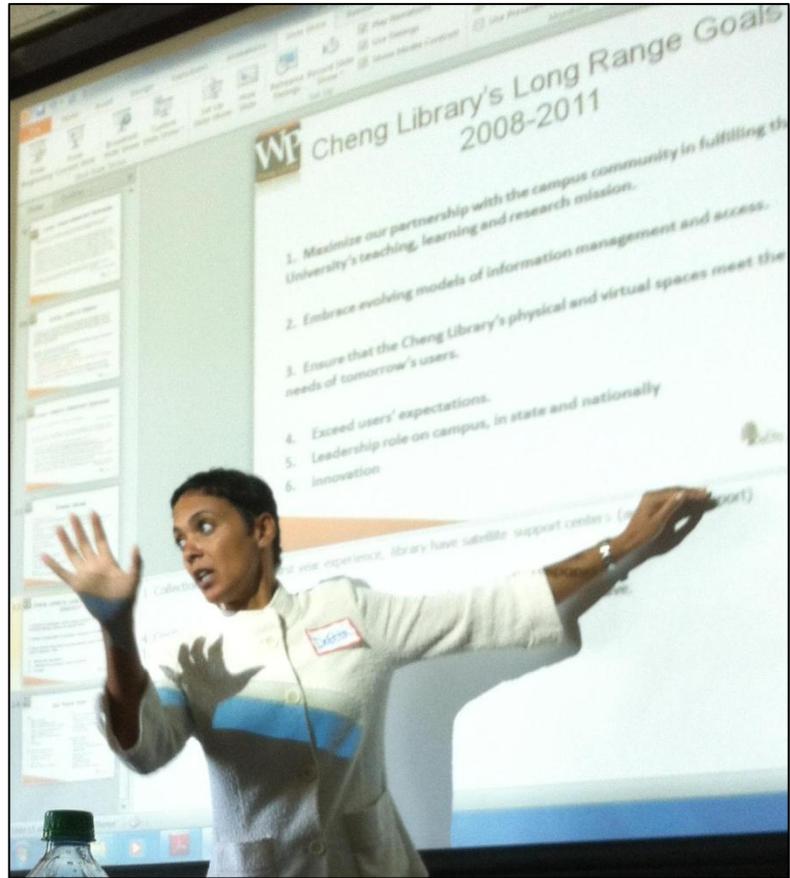
Despite the many significant changes to the traditional landscape of academic librarianship and scholarly publishing, the Cheng Library remains firmly committed to its mission of supporting the academic goals of William Paterson University. The University’s recently adopted *Strategic Plan, 2012-2022* provides an important new framework for setting the Library’s own priorities for the next six years, as evidenced in its five overarching goals: delivering quality academic programs, achieving student success, expanding learning opportunities beyond the classroom, enhancing the sense of community throughout and beyond the campus, and becoming a model of outstanding and affordable public higher education.

Process

It was decided from the outset that the planning process would be divided into two major phases: the first phase focused on the high-level creation of the anchoring elements of a plan and the second on soliciting input from key internal and external stakeholders in reaction to the high-level plan and then shape the specific actions steps in pursuit of strategic goals. The first phase of the Library’s planning process began in July, 2012, guided and ignited by DeEtta Jones, a nationally known planning consultant for higher education institutions and academic libraries. A Planning Committee was established, comprising 11 staff members, five academic chairpersons or deans, the University’s CIO and the Director of Instruction and Research Technology. Feedback with other Library staff was sought and received as the Planning Committee worked through environmental and campus scans to better understand the political, economic, social and educational issues and opportunities relevant to the Library’s purpose and mission.

With assistance from Jones, the Planning Committee came to better understand the *strategic* nature of its planning efforts, which they embraced as choices/priorities/decisions that

would drive many Library initiatives in the coming years. Aligned with the goals of the University Plan, informed by environmental and campus scans (see attached) and set within the changing landscape of 21st century academic librarianship, the Planning Committee reviewed and revised its mission and vision statements, developed a set of core values and identified five major goals. The Planning Committee also noted the importance of the Library's *enabling capabilities*, the core strengths and activities that direct its ongoing daily operations and without which any new priorities are bound to flounder.



DeEtta Jones, July 2012

The process began with an all-staff meeting to introduce the effort, timeline, Planning Committee members, and set the tone for communication throughout the process. The following Planning Process Working Principles points were communicated at the opening all-staff meeting, and shared again in email communication and subsequent all-staff meetings:

- **Staff participation** will be a cornerstone of the planning process. The Strategic Planning Committee (SPC) includes representatives from the library faculty and support staff, as well as members of the teaching faculty and University administration.
- **Transparency of process** will be achieved by holding open meetings and posting summaries of discussions and meetings in an online venue developed for this purpose. Online discussions will also be supported at bb.wpunj.edu
- **Staff feedback** is encouraged throughout the planning process. Each section of the plan will be shared with the entire staff, with opportunities for discussion and feedback; revisions will be made as appropriate. The process will follow this format: develop a draft; share and discuss, and revise as appropriate before moving on to the next step of the planning process

This opening all-staff meeting was also used to begin involving staff in the process of imaging their future customers, through a facilitated personas exercise, and engaged in a brainstorming activity related to the library's key organizational values. This plan and the process reflect the values of the Cheng Library as much as its goals. It reinforces the desire to move from incremental change to a more intentional positioning of the Cheng Library and its resources on the services and deep expertise that are needed for excellence in the 21st century academic environment. Additional meetings of the Strategic Planning Committee and the Cheng Library staff, to be held in January, 2013, will highlight the plan and provide opportunities to share insights that informed the planning process and the articulation of a new set of goals.

Strategic Planning Committee



Anne Ciliberti	Library Dean
Bill Duffy	Head of Reference
Stephen Hahn	Associate Provost and Interim Dean, College of the Arts and Communication
DeEtta Jones	Consultant
Richard Kearney	Electronic Resources Librarian, Cheng Library
Cyril Ku	Chair, Department of Computer Science
Kate Makarec	Chair, Department of Psychology
Kathy Malanga	Assistant Director for Access and Information Services
Gary Marks	Principal Library Assistant, Lending Services
Sandra Miller	Director of Instruction and Research Technology
Patricia Moore	Technical Library Assistant, Curriculum Materials
Cesar Perez	Chair, Department of Marketing and Management Sciences
Eric Rosenberg	Chief Information Officer
Mark Sandford	Special Formats Cataloger, Cheng Library
Pamela Theus	Assistant Director for Resource Management
Kurt Wagner	Assistant Director for Library Information Systems
Victoria Wagner	Head of Access Services, Cheng Library

Linnea Weiland Chair, Department of Elementary and Early Childhood Education
Nancy Weiner User Education Coordinator and Reference Librarian

Mission, Vision and Core Values

Mission of the Cheng Library

The David and Lorraine Cheng Library is the academic knowledge center of William Paterson University. The Library advances the University's mission and core values: academic excellence, creation of knowledge, student success, diversity and citizenship. To further this mission, the Library provides access to scholarly materials and instruction in their use, expert service and state-of-the-art facilities. More broadly, the Library:



- Contributes to the success of the University's educational and co-curricular programs;
- Champions the benefits of information technology for all segments of the University community;
- Supports progressive models of information exchange, resists all efforts at censorship and promotes ethical uses of information;
- Actively seeks new methods and innovations for the delivery and use of academic knowledge in the University community;

Vision of the Cheng Library

The Cheng Library will be central to the accomplishments of the University and valued for its leadership on campus and throughout the state.

- When students describe their academic success, they credit the Library's role;
- When faculty speak with pride about their teaching and research at William Paterson University, they acknowledge the Library's contributions;
- When campus units look for partners, they immediately consider the Library;

- When librarians around the state seek out best practices, they look to the Cheng Library at William Paterson University.

Core Values of the Cheng Library

Consistent with its mission and vision, the Cheng Library staff value:

1. Excellence in the quality and delivery of library services and resources supporting the University's teaching, learning, research and service goals.
2. The unique contributions that library instruction, services and resources provide to student success and lifelong learning.
3. Open and effective communication at all levels, both internally within the library organization and externally with the campus community and beyond.
4. Diversity of ideas, culture and expression in our staff and collections.
5. A library climate that supports the professional development of its staff and fosters collaboration with colleagues across campus, regionally and nationally.

Strategic Goals of the Cheng Library

Preamble

The strategic goals outlined below articulate five specific, significant directions for the Cheng Library over the next six to eight years. This focus is not intended to minimize the importance of the Library's *enabling capabilities*, the core strengths and activities that direct its ongoing daily operations and without which newly defined priorities would certainly flounder. Moreover, the goals reflect the evolving nature of library collections, where the scope of the term "collections" is understood to extend beyond *ownership* of physical materials to *access* to resources, regardless of format or how they were procured.

- Goal 1: The Library will increase and strengthen its presence and contributions to all aspects of online education – teaching and learning, research, services, and resources;
- Goal 2: The Library will enhance its collections and their usability to best support the University's academic goals;

- Goal 3: The Library will establish a comprehensive communication strategy, tailored to each of its stakeholder groups, to articulate its values, to foster collaboration, and to increase awareness and use of its services and resources;
- Goal 4: The Library will create physical and virtual learning spaces where students and faculty can productively interact with each other, with Library staff and with Library resources;
- Goal 5: The Library will lead and innovate, bringing to campus new directions and opportunities for the delivery and use of academic knowledge.

Alignment of Cheng Library Goals to University Strategic Goals



As noted in the Process section of this document, a key goal in the Cheng Library planning process was alignment of the Library’s strategic directions to those identified in the University’s *Strategic Plan, 2012-2022* approved in March, 2012. The table below illustrates this alignment graphically while the text beneath the table provides the context for these goals in the Cheng Library environment.

Cheng Goal 1:	The Library will increase and strengthen its presence and contributions to all aspects of online education, teaching and learning, research, services and resources;	WPUNJ GOAL I & II -Offer academic programs of the highest quality. -Achieve student success by increasing matriculation, retention and graduation.
Cheng Goal 2:	The Library will enhance its collections and their usability to best support the University’s academic goals;	
Cheng Goal 5:	The Library will lead and innovate, bringing to campus new directions and opportunities for the delivery and use of academic knowledge;	
Cheng Goal 3:	The Library will establish a comprehensive communication strategy, tailored to each of its stakeholder groups, to articulate its values, to foster collaboration, and to increase awareness and use of its services and resources;	WPUNJ GOALS II & IV: -Achieve student success by increasing matriculation, retention and graduation. -Enhance the sense of community throughout and beyond campus.
Cheng Goal 4:	The Library will create physical and virtual learning spaces where students and faculty can productively interact with each other, with Library staff and with Library resources.	WPUNJ GOALS II, IV & V -Achieve student success by increasing matriculation, retention and graduation. -Enhance the sense of community throughout and beyond campus. -Establish the University as a model of outstanding and affordable public higher education.

Cheng Library Goal 1 addresses the need to expand and strengthen the Library’s capacity to support high-quality academic programs delivered online or through other technology-enabled learning media. It aligns with University Strategic Goals I and II. Library support for online, academic programs and student success requires access not only to digital materials, but to digital services, such as reference, interlibrary loan and instructional support.

Representative Library objectives related to Library Goal 1 include investigating new web-based discovery tools, enhancing online reference service and accelerating the migration from print to digital in some collection areas.

Cheng Library Goal 2 speaks to a core Library mission: the provision and enhancement of information resources that support quality academic programs; it aligns with University Strategic Goals I and II. Rigorous, high-quality academic programs and student academic success require a network of current, carefully-selected, quality collections in appropriate formats.

Representative Library objectives include undertaking more projects to convert local resources from print to digital, enhancing use of the University Archive and Special Collections and promoting use of e-resources.

Cheng Library Goal 3 addresses the need for a comprehensive communication strategy tailored to each of its stakeholder groups: students, faculty, alumni and local community residents; it aligns with the spirit of University Strategic Goals II and IV. Although the Library serves each of these constituencies differently, it seeks to increase its relationships and engagement with all and thereby to enhance the academic success and educational experiences of students and to satisfy the intellectual curiosity and information needs of others.

Representative Library objectives include developing a new communication plan and implementing a new faculty orientation program.

Cheng Library Goal 4 focuses on the need to provide the University community with learning space, both virtual and physical, that promotes the productive interaction and exchange among faculty and students and with Library staff and with Library resources. This goal aligns with University Strategic Goals II and IV, for the intended outcome of these interactions is to promote student success and the engagement of all stakeholders with information providers and resources. It also aligns with University Strategic Goal V’s commitment to ensuring that “campus facilities support evolving academic programming, diversified enrollment growth and technological needs.” The Library as physical structure is important not only for its symbolism, but as a clean and safe environment conducive to learning.

Representative Library objectives include exploring new technologies for providing virtual reference assistance, increasing student study space where possible and investigating research data management options and best practices.

Cheng Library Goal 5 highlights the Library’s proactive role in harnessing the best technologies for the delivery and use of scholarly material in support of high-quality academic programs and student academic success; it aligns with University Strategic Goals I and II. In the 21st century world of librarianship, information professionals recognize that the technology packaging and delivery of information resources are just as important as the information content.

Representative Library objectives include increasing faculty awareness about open access publishing, expanding the WPUNJ Digital Thesis project and testing new integrated system software.

Cheng Library Goals & Objectives by Unit – FY2014



AIS (Access & Information Services) Reference, Lending Services, Library Instruction, & Curriculum Materials

RM (Resource Management) Acquisitions, Cataloging, Interlibrary Loan/Document Delivery, & Periodicals

LIS (Library Information Systems) Integrated Library System, Library automation, hardware/software support, Library data reporting and analysis, Technology liaison with campus

Goal 1: The Library will increase and strengthen its presence and contributions to all aspects of online education – teaching, learning, research, services and resources:

AIS Objective 1.1: Increase reference and library instructional support for online and hybrid courses beginning with an analysis of existing tools and uses patterns. Provide staff development for screencasting and related techniques. Explore models and methods of delivery of online user education.

LIS Objective 1.1: Conduct feasibility study and develop a proposal for web-scale discovery service.

RM Objective 1.1: Develop and implement a policy that minimizes the Library’s print holdings – where possible, and increases the digital options for subscriptions, storage and retrieval.

Goal 2: The Library will enhance its collections and their usability to best support the University’s academic goals.

AIS Objective 2.1: Update the CMC textbook collection to include textbooks incorporating the 2010 Common Core Standards over a three year period. FY 14 will consist of a needs assessment by discipline and the initial selection of resources based on priorities established by the needs assessment

AIS Objective 2.2: Work with LIS and Resource Management to enhance the usability of online search tools including additional VUFind features. Explore the advantages and disadvantages of the use of discovery tools from the perspective of undergraduates, graduate students and faculty. Make a recommendation concerning the use of a discovery platform. Implement mobile versions of databases as they become available and promote the use of these features to the University community.

AIS Objective 2.3: Enhance accessibility of circulating collection by implementing a paging service for students and faculty. Determine settings and reports in Voyager for patron initiated requests. Develop workflows to accommodate the retrieval and in some cases delivery of the materials.

AIS Objective 2.4: Annually digitize a core special collection and make it accessible from the Library Archive page. Identify and prioritize potential digitization projects and complete the first project in FY14.

AIS Objective 2.5: Enhance the use of Archives and Special Collections.

AIS Objective 2.6: Enhance the usability of Library Archive page.

LIS Objective 2.1: Enhance ability to analyze library resource usage by researching dashboard indicators and related best practices.

LIS Objective 2.2: Coordinate digital projects and create the Lorraine Cheng Digitization Workshop (LCDW).

RM Objective 2.1: Promote and increase the use of e-resources.

RM Objective 2.2: Provide enhanced access to monographic serials through Serials Solutions.

RM Objective 2.3: Develop and implement a workflow to improve the quality of the Beacon online archive.

RM Objective 2.4: Research and develop collection analysis metrics to revise the allocation formula, the Collection Development Policy and for other general purposes.

Goal 3: The Library will establish a comprehensive communication strategy, tailored to each of its user groups, to articulate its values, to foster collaboration, and increase awareness and use of its services and resources.

AIS Objective 3.1: Develop a plan to increase communication to library user groups and stakeholders. Establish a library-wide committee to coordinate communication and analyze existing channels for targeted user groups.

RM Objective 3.1: Develop and implement a New Faculty Orientation Program focusing on Library services.

Goal 4: The Library will create physical and virtual learning spaces where students and faculty can productively interact with each other, with Library staff and with Library resources.

AIS Objective 4.1: Expand the provision of reference service in alternate locations where feasible (embedded in BB if appropriate, mobile reference – within the building and elsewhere). Explore opportunities to embed help in virtual settings – such as linking to chat client or tutorials in context specific virtual spaces. Identify best practices at other institutions and determine which approaches will work best at William Paterson.

AIS Objective 4.2: Continue to enhance the learning spaces in the Library to accommodate differing study and learning needs. Increase seating capacity in areas where collections are downsized. The Facilities Group will determine needs and priorities for this planning cycle and investigate the use of a space planning consultant.

LIS Objective 4.1: Explore research data management options and best practices.

Goal 5: The Library will be recognized for its leadership and innovation in bringing to campus new directions and opportunities for the delivery and use of academic knowledge.

AIS Objective 5.1: Increase awareness of open access publishing issues and opportunities among faculty and administration. Create and offer workshops for faculty as part of the Cheng Library workshop series.

AIS Objective 5.2: Increase departmental participation in the WPUNJ Digital Thesis project through outreach to the DNP and other programs not yet included in the project. Work with existing and new programs to set targets for student participation in the thesis digitization project.

LIS Objective 5.1: Test implementation of Quali-OLE in support of the VALID project (NJ shared, open-source ILS).

RM Objective 5.1: Lead participation in preparing the Voyager database for the move to VALID, VALE's open-source library system currently in development.

Cheng Library Goals & Objectives by Unit – FY2015

AIS (Access & Information Services) Reference, Lending Services, Library Instruction, & Curriculum Materials

RM (Resource Management) Acquisitions, Cataloging, Interlibrary Loan/Document Delivery, & Periodicals

LIS (Library Information Systems) Integrated Library System, Library automation, hardware/software support, Library data reporting and analysis, Technology liaison with campus

Goal 1: The Library will increase and strengthen its presence and contributions to all aspects of online education – teaching, learning, research, services and resources:

AIS Objective 1.1: Increase reference and library instructional support for online and hybrid courses through a variety of approaches including conversion of print reference collections to electronic, strategies for increasing the use of electronic reserves and enhancements to online reference service. Assess faculty and student needs associated with online and hybrid courses and determine methods for addressing individual and course-specific reference and instruction in synchronous and asynchronous environments.

LIS Objective 1.1: Implement a web-scale discovery service if feasibility study is positive and funding is available.

RM Objective 1.2: Explore the feasibility of creating an archive of selected born-digital documents created by the University.

Goal 2: The Library will enhance its collections and their usability to best support the University's academic goals.

AIS Objective 2.1: Update the CMC textbook collection to include textbooks incorporating the 2010 Common Core Standards. Monitor trends in the publication of K-12 eTextbooks and common core standards. As discipline-based sets are added to the collection, work with faculty to promote the use of these resources by students in the teacher education programs.

AIS Objective 2.2: Work with LIS and Resource Management to enhance the usability of online search tools. Explore usability of library webpages and libguides and make recommendations to improve student access and use. Continue implementing mobile versions of resources as they become available.

AIS Objective 2.3: Enhance accessibility of circulating collections by implementing a delivery service for faculty on the main campus.

LIS Objective 2.1: Enhance ability to analyze library resource usage by creating dashboard indicators and related best practices as recommended from previous investigation.

RM Objective 2.4: Implement the collection analysis metrics to revise the allocation formula, the Collection Development Policy and for other purposes.

Goal 3: The Library will establish a comprehensive communication strategy, tailored to each of its user groups, to articulate its values, to foster collaboration, and increase awareness and use of its services and resources.

AIS Objective 3.1: Develop a plan to increase communication to library user groups and stakeholders. Develop mechanisms (focus groups, blogs, quick surveys) to enhance user feedback on library resources and services in addition to LibQual.

RM Objective 3.1: Highlight parts of the collection to appropriate constituencies.

Goal 4: The Library will create physical and virtual learning spaces where students and faculty can productively interact with each other, with Library staff and with Library resources.

AIS Objective 4.1: Expand the provision of reference service in alternate locations where feasible. Pilot reference service in alternate locations such as the student center, residences at targeted times during the semester,

AIS Objective 4.2: Continue to enhance the learning spaces in the Library to accommodate differing study and learning needs. Remove several periodicals stacks and convert to study space. Implement projects identified as priorities in the Facilities Plan pending availability of funds.

LIS Objective 4.1: Report research data management options and best practices, including those pertinent to the development of an institutional repository.

Goal 5: The Library will be recognized for its leadership and innovation in bringing to campus new directions and opportunities for the delivery and use of academic knowledge.

AIS Objective 5.1: Work with IRT, TAC and the Senate Technology Council to provide faculty development for those interested in open access projects.

AIS Objective 5.2: Increase participation in the WPUNJ Digital Thesis project. This is an ongoing project. Focus on anticipated new programs such as the doctorate in counseling.

LIS Objective 5.1: Conduct beta testing implementation of Quali OLE for WP in conjunction with other VALE alpha implementing institutions.

RM Objective 5.3: In conjunction with LIS, develop and implement a campus-wide, web-based comprehensive database of faculty and staff scholarly and creative activities.

Background Information

WILLIAM PATERSON UNIVERSITY

Summary of Environmental and Campus Scans Conducted for the Cheng Library Strategic Planning Process

September 6, 2012

As part of its strategic planning process, during the summer of 2012 the Cheng Library's Strategic Planning Committee conducted an environmental scan of external and campus factors deemed most relevant to the Library's mission. The following pages summarize these findings.

Summary of Environmental Scan

A number of factors were identified for each of the three areas that were the focus of Cheng Library's Environmental Scan. Examining the results for the Education, Socio-Cultural and Technological factors, a few patterns or issues have emerged. Anticipating and being prepared for change is a common theme in each of the areas, especially in terms of technology, demographics, pedagogy and funding for higher education, which, in turn, often overlap and impact/influence each other. The evolving methods used for providing services and resources to users also emerged as a common theme which may be influenced by both internal (students, faculty) and external (funding, publishing industry) factors. While there were a few additional issues noted, such as the potential for barriers in communication with international students, the emphasis is clearly on the notion that the Library and how it operates and provides services and resources to its users will undergo radical changes within the next five years. The Library will need to be prepared to adjust to these changes as we move forward.

Potential Impacts

- Education Factors
 - Budget issues that may force Library to seek external partners & funding opportunities through collaborative grants.
 - Evolving publishing trends may have a significant impact on Library purchasing.

- Faculty research areas may shift. Some faculty may also not be adjusting to shifting student demands and skills creating a disconnect between assignments and student skill sets.
- Different approaches to providing instruction models in an online setting will need to be developed to meet student needs.
- **Socio-Cultural Factors**
 - Provision of convenient, efficient processes (eBooks, online journals) online learning resources, services and tutorials to meet the needs of students struggling to maintain a work/family/school balance.
 - Provide more evening & weekend classes and workshops and possibly provide daycare serviced within the Library.
 - Be prepared to communicate with students from diverse backgrounds by training staff in multi- cultural communication.
 - Be prepared for staff to spend more time assisting students in navigating and using library resources who may be underprepared for college level work.
 - Increase emphasis on globalization and foreign language materials in collection.
- **Technological Factors**
 - Processes need to be redesigned around mobile technology and attract users' attention.
 - Increase use of social media to communicate with users.
 - Adopt user based feedback mechanisms to determine user wants and needs.
 - Data management strategies and methods need to be redesigned and access control revisited.
 - Service delivery strategies need to be reevaluated and redesigned.
 - Increase power supply by adding charging stations and make it easier to join wired and wireless networks.
 - Explore cloud based license server control.
 - Provide LCD projectors in work areas that will allow connection by one or more devices and possibly offer touch/interactive capability.
 - Weed paper collections of journals and explore offsite storage possibilities.

Summary of Campus Scan

A variety of individuals on campus were interviewed, representing a range of units and departments. Small groups of students and faculty were also interviewed. Common themes emerging from the interviews include increased collaboration with the Library in terms of providing additional support/services to both students and faculty using emerging technologies

which include online databases, data management tools, and data repositories. There was also interest shown in some form of publishing tool for faculty and, potentially, student research. The Library was also viewed by some units as capable of taking on a leadership role in open access and providing innovative library instruction and research assistance to students and faculty. Maintaining a focus on the physical space of the library was also noted, with suggestions of study rooms becoming “smart” rooms and the addition of a writing support center being located in the Library.

Potential Impacts

- Most themes emerging would impact staff time and cost of services and resources
 - Provide expanded and additional support for students by possibly introducing a writing center, assisting with grant writing and providing additional online support.
 - Create commuter student library liaison to work with students to develop programming attractive to the non-resident students and provide services and spaces that appeal to commuters.
 - Create innovative library instruction activities to engage students in understanding the scholarly research process. Helping to build students’ information literacy skills and develop lifelong learners should also remain a focus.
 - Provide greater support for faculty research through expanded training and potentially collaborate with the Center for Teaching Excellence to provide access to resources online.
 - Capturing and publishing faculty research and publications, along with publishing reports and other data in an institutional repository that could be used by various departments on campus.
 - Offer programming and opportunities for volunteer work.
 - Provide “smart” study rooms that could be used for specific populations in addition to being used by all students.
 - Solicit feedback from students and other users of the library’s physical space to determine the future needs of the physical space.

