

Appalachian State University Library



# strategic plan

2008 - 2013

Our Library will enrich the lives of anyone who has the desire to venture beyond that which is expected. —*Appalachian State University student*

## Mission

**The mission of the Appalachian State University Library is to assist those who pursue knowledge.**

## Vision

**The Appalachian State University Library** is a dynamic partner in the campus and distance learning communities, dedicated to the provision of full and equal access to information and the preservation of our intellectual and cultural heritage. Our collections, portals to information and text, services, and instruction contribute to the campus missions of learning, scholarship, engagement, and effectiveness. Our vision is to broaden the learning experience, to encourage creativity and scholarship at all levels, to deepen the campus engagement with the community and world, and to develop an effective organization that can meet current and future information needs. These areas of learning, scholarship, engagement, and effectiveness are our four strategic directions:

### Learning

Twenty-first century college graduates should be able to successfully navigate a world of media, information, and technology, and apply their learning in creative and thoughtful ways. The Library uses advanced pedagogical methods and practices to enable students to become active participants in the learning process by helping them think critically and creatively, communicate well, and employ effective strategies to collect and interpret information.

### Scholarship

Scholarship and creative work are key components of the Library's mission. We collaborate with others to raise the research profile of the campus and to support the highest level of faculty, staff, and student scholarship and creativity. We also produce research that adds to the body of knowledge created at Appalachian.

### Engagement

The Library offers a holistic program, touching the intellectual, cultural, social, and economic interests of the individual. We move beyond traditional library services, reaching out to the campus community and beyond to enhance education in the broadest sense. We influence and effect change through diverse service initiatives and through collaboration with individuals and organizations with mutual interests.

### Effectiveness

An effective organizational culture is characterized by timely and inclusive communication, clear and reasonable expectations, flexibility, and support of risk-taking and innovation. A systematic plan of assessment helps focus efforts on effective library services that positively impact teaching and learning, scholarship, and engagement at Appalachian.



## Strategic Direction I: Learning

### Objective 1:

Develop a comprehensive educational program that contributes to university educational goals and student learning outcomes.

#### Activity 1.1:

Develop an instruction and outreach plan which addresses the information literacy goals of students as outlined in the University's General Education Guidelines. A comprehensive plan will include instruction as well as reference services at all levels.

#### Rationale:

Strengthening the information literacy skills of students is a formal goal of the Library and will be incorporated into the University's General Education program for Appalachian State students. Creating a comprehensive program includes addressing information literacy goals at all levels, freshman to graduate student, and addressing all the entry points into the curriculum. Components to consider include:

- Performance indicators and learning outcomes which build from year-to-year (freshman, sophomore, junior, senior, graduate) and are based on the ACRL Information Literacy Competency Standards for Higher Education
- Appalachian State University's curricular initiatives such as General Education, Writing Across the Curriculum, Freshmen Learning Communities, Honors Program, E-Learning Initiative, and Learning Assistance Program
- Specific teaching possibilities such as increased library faculty participation in the Research Advisory Program (RAP), participation in E-Learning Summer Institute, creation of for-credit courses such as US 1531 or research skills within a discipline

A comprehensive plan will also address reference desk service, providing individualized instruction (through the Research Advisory Program and similar initiatives), remote reference through email and telephone, and 24-hour service from reference providers outside the Library.

#### Assessment:

- Performance indicators and learning outcomes based on the ACRL Information Literacy Competency Standards for Higher Education and Project SAILS
- ACRL Best Practices for Program Evaluation (direct measurement of the progress toward program goals and objectives and short-term, formative, summative, and longitudinal reviews)

**Activity 1.2:**

Develop information literacy components for inclusion into academic courses and market them to teaching faculty.

**Rationale:**

Integrating library educational programs with interdisciplinary programs across campus effectively guides student academic achievement and success while promoting collaboration between the Library and campus units. Faculty outreach opportunities include meeting faculty through workshops at the Hubbard Center, Freshman Seminar teachers' orientation, and New Faculty Orientation. Marketing to the campus community can include outreach to campus groups about the instruction program, and the instruction librarians' attendance at functions and on committees. Marketing will also include promoting the program through press and publications.

The information literacy components can include such tools as tutorials and Web services and the development of reusable learning objects.

**Assessment:**

- Feedback from surveys and informal feedback
- LibQUAL+ results on affect of service
- Progress towards target learning outcomes
- Number and scope of faculty members reached and information literacy components included in courses

**Activity 1.3:**

Support librarians with training and professional development opportunities to help them develop and sustain information literacy components within the curriculum.

**Rationale:**

Training is essential to be on the cutting edge of educational/learning theories. Due to the changing nature of information technology and information literacy pedagogy, librarians must learn new and innovative ideas in order to create robust programs for their users. Examples of this include participation in information literacy professional development programs such as the ACRL Immersion Institute as well as participation in on-campus professional development activities related to learning.

**Assessment:**

- Number of people participating in professional development activities
- Evaluation of administrative support to attend professional development events

**Objective 2:**

Provide learner-centered and virtual spaces for resource exploration, information delivery, and access to services and resources at the learner's point-of-need.

**Activity 2.1:**

Build new and improve existing library virtual spaces.

**Rationale:**

In order to anticipate and meet the needs of a new generation of researchers and learners, the Library must focus increasingly on making our content adaptable for a variety of environments and providing modules that work outside of the realm of the Library's Web site and catalog. By creating asynchronous, synchronous, and virtual learning environments, an array of resources and services are available for users at their point-of-need. In this way, the Library promotes learning that is interactive and individualized and continues outside of the classroom environment.

Examples of initiatives to pursue include:

- Integration of library resources and services into formats beyond the Library's own Web site such as Moodle
- Continual improvements to the effectiveness of the Library's presence whether through its catalog or Web pages
- Development of Web 2.0 / Library 2.0 initiatives (e.g. social networking applications)
- Digitization of special collections materials, including a *Documenting Appalachia* Web site and other digitization initiatives
- Allocation of digital media space for the creation of innovative presentations and learning modules
- Collaborative ventures with other campus units to develop new digital resources

**Assessment:**

- Accomplishment of targeted activities
- User surveys to assess outreach impact, access to resources, information delivery
- Survey methods can include large-scale surveys, observation studies, targeted surveys, focus groups, guided interviews, usability testing, and both traditional and electronic suggestion boxes
- Progress on the learning outcomes established for each initiative
- LibQUAL+ results on affect of service and information control

**Activity 2.2:**

Create seamless access and remove barriers to collections and services.

**Rationale:**

The development of digital resources and electronic databases has been both a help and a hindrance to researchers. Many patrons find navigating the world of electronic information daunting. In this world, the Library must investigate virtual ways in order to provide service to our patrons at the point of need, whether the patron is in the physical library space or beyond its walls. An information resources network that is available from anywhere, at any time, supports broader and more efficient access for all users. By striving for truly seamless access, the Library will make patrons' search for texts significantly easier.

Examples of initiatives to pursue include:

- Development of technologies to enable users to search multiple resources simultaneously (e.g. federated searching products and portals)
- Continued improvements to the efficiency and quality of the catalog (e.g. Table of Contents, interactivity improvements such as tagging; exploration of tools for context-based browsing or visualization)
- Implementation and evaluation of synchronous and asynchronous reference services
- Creation of "My Library" type applications
- Work to improve seamless access to information resources
- New approaches to deliver documents directly to end-users
- Continual review of policies that directly affect access to information for improvements

**Assessment:**

- Accomplishment of targeted activities
- User surveys to assess outreach impact, access to resources, information delivery
- Evaluation of progress on learning outcomes established for each initiative
- Track trends in technology and modify products as needed
- Focus groups, guided interviews, usability testing, and both traditional and electronic suggestion boxes
- LibQUAL+ results on affect of service and information control
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### Objective 3:

Enhance the Library's space and hours based on patron needs to be a magnetic and complete learning environment.

#### Activity 3.1:

Make the best use of our physical space to provide a welcoming, collaborative environment.

##### Rationale:

In 2005, the new Belk Library and Information Commons opened its doors, offering substantial improvements to the learning and research environment of campus. Our new space emphasizes the focus of contemporary pedagogy on collaborative, problem-based, and inquiry-based learning. The Library provides the campus with its most crucial learning environment outside the classroom.

To facilitate learning, the Library must provide adequate collaborative spaces, protection of quiet study, and an overall attractive and welcoming environment. Along these lines, we must avoid encroaching on public spaces unnecessarily. We must also provide the necessary technology to research and learn. We must evaluate and meet patrons' comfort and technology needs and modify and enhance the Music and Main Libraries to make the buildings a pleasant place to study and research. Lastly, we must evaluate our space for ADA compliance and go beyond to ensure that we have accommodating facilities for those with disabilities and different learning needs.

##### Assessment:

- LibQUAL+ results on library as place
- User feedback, evaluating use patterns to assess changing needs of patrons
- Response to patron complaints/comments
- Monitor furniture for wear and tear and continue to purchase needed equipment

#### Activity 3.2:

Monitor and adjust current operating hours as needed.

##### Rationale:

The Library will continue to evaluate the current operating hours available to its patrons to ensure we are meeting the research needs of all types of users.

##### Assessment:

- LibQUAL+ results on library as place
- User feedback, evaluating use patterns to assess changing needs of patrons
- Feedback from Student Government Association (SGA), the Graduate Student Association, and other representative student groups

**Activity 3.3:**

Host outreach events to draw potential users into the Library and create a complete and interactive learning environment.

**Rationale:**

The Library transcends traditional user patterns and will promote all forms of information dissemination. Through curating displays and online exhibits and sponsoring academically-based events, the Library will be the center of intellectual and creative activity on campus. The Library will make as a goal the sponsorship and co-sponsorship of outreach events such as film series, speakers and discussion groups, workshops and brown bag series, and creative events to increase campus participation within the library environment.

**Assessment:**

- Participation / attendance at outreach events
- User patterns, targeted surveys, traditional and electronic suggestion boxes



## Strategic Direction II: Scholarship

### Objective 1:

Encourage and facilitate the production of original and creative scholarship.

#### Activity 1.1:

Provide print, electronic, and special collections library materials appropriate to support faculty and student research.

##### Rationale:

The traditional role of a library to build and maintain its knowledge store of print and electronic resources as a starting point for research remains a valid strategy to support scholarship in the twenty-first century. The Library must continue to partner with UNC System schools and form consortial arrangements that provide the greatest return for its investment. In addition, the Library will bolster scholarly endeavors by improving the quality and quantity of unique and unexamined scholarly source material through a carefully planned program of acquisitions in areas of strength and selected new subject concentrations. The Library will be a center for research and scholarship, beyond our traditional focus on Appalachia.

At the same time, digitization of important, heavily used collections such as photographs and University publications must move forward; and the condition of Special Collections materials will be surveyed with an eye towards funding a comprehensive preservation plan.

##### Assessment:

- Student & faculty surveys including LibQUAL+ results on information control
- Comparison to peer libraries
- OCLC WorldCat Collection Analysis to compare our holdings against other libraries
- Comparison against "best of" and "award" lists
- Annual evaluation of cost savings from consortial agreements
- Balanced Scorecard: impact analysis of use-per-dollar spent over time

#### Activity 1.2:

Increase outreach that supports faculty research, scholarship, and creative activities.

##### Rationale:

The Library can continue to partner with faculty in ways that support their research and creative projects.

Ideas beyond one-on-one relationship building might include lunches with departments to understand the needs of the individual researcher, research consultations with faculty members, workshops during new faculty orientation, and other outreach activities.

**Assessment:**

- Number and quality of outreach interactions
- Participation in outreach events and scope of targeted audience reached

**Activity 1.3:**

Collaborate with others to establish a Library Research Award for undergraduate and graduate research.

**Rationale:**

The Library actively promotes opportunities for undergraduate and graduate students to participate in research initiatives that promote creativity and expand academic scholarship. The Library Research Award will attract the best student papers from courses taught in academic programs across the campus. It will recognize excellence in research projects that show evidence of significant use of the library, its resources, and collections, and demonstrate learning about research and the information-gathering process. The award could be created in collaboration with other units on campus (e.g. Undergraduate Research) and decided by the Library Services committee or another outside group of faculty/staff.

**Assessment:**

- Number and quality of applications
- Effectiveness in starting a sustainable process

**Activity 1.4:**

Make our space more available to highlight the academic research of the campus faculty and students.

**Rationale:**

The use of library materials and service by faculty and students across the campus contributes significantly to research endeavors. Often, recognition is unknown – or limited – to a small part of the campus community. The Library can host public lectures, panel presentations, performances, that highlight and recognize scholarly pursuits by the Appalachian State University faculty and students.

**Assessment:**

- Attendance / publicity about events in the Library
- Interest among faculty to present their research

**Activity 1.5:**

Collaborate with the Office of Research and Sponsored Programs to better coordinate grant and funding resources and co-sponsor workshops on grant and funding related topics.

**Rationale:**

The Library can work closely with the University's Office of Research and Sponsored Programs to better coordinate the grant and funding resources, and co-sponsor tutorials, workshops and presentations on grant programs and the preparation of grant documents.

Grant resources and services overlap between the Office of Research and Sponsored Programs and the Library. Both wish to provide outreach to students and faculty and coordination will reduce duplication and

create stronger efforts to the benefit of research across campus.

**Assessment:**

- University figures on grant-funded projects
- Attendance at co-sponsored tutorials, workshops, presentations

**Activity 1.6:**

Provide assistance to local and visiting scholars through physical accommodations and a Web page to help visiting scholars plan their research trips.

**Rationale:**

Most of our unique research materials are located in the fourth floor Special Collections area. By providing comfortable and well-equipped work space, we can expect to increase the use of those materials. Physical support for Appalachian faculty and visiting researchers can include carrels, lockers, and other equipment. In addition, a central Web page is needed to provide easily accessible information regarding location, parking, and services for researchers.

**Assessment:**

- Patron surveys regarding utility of space including LibQUAL+ results on library as place
- Hits on Web page

**Objective 2:**

Support library faculty in their scholarly activities.

**Activity 2.1:**

Create a library research group to support internal research.

**Rationale:**

There is currently no centralized means for communicating research interests and opportunities to the faculty. A research group of library faculty could communicate release time options to faculty members, gauge the success of the current structure and learn more about the various issues and needs faced by library faculty pursuing research. It could also communicate funding opportunities from external sources, put library faculty with similar research interests in touch with each other, and promote the ongoing scholarship mission of the library faculty.

**Assessment:**

- Scholarship produced by faculty
- General impressions about the ability of the research group to help impact scholarship
- General satisfaction of library faculty with research support
- Amount of funding distributed from year-to-year

**Activity 2.2:**

Encourage faculty to assist and mentor each other in research projects.

**Rationale:**

It is important that the library faculty as a whole is aware of the various ways in which we pursue scholarship within our disciplines and that all faculty members have access to mentors who can advise them.

**Assessment:**

- General satisfaction of library faculty with research support
- Scholarly output of library faculty members

**Activity 2.3:**

Update and promote the policy on release time for faculty research.

**Rationale:**

Since library faculty do not have a standard course load, we need to determine what "release time" means for librarians in regard to a standard work load. We need to ensure that all library faculty are aware of their options regarding release time and encourage them to pursue ways of setting aside time for research, whether in short daily sessions or more long-term off-campus scholarly assignments.

**Assessment:**

- Survey the satisfaction level of library faculty with research support
- Scholarly output of library faculty members

**Activity 2.4:**

Provide information about funds available for researchers.

**Rationale:**

Funding for research normally includes money for travel, research materials such as books and software, equipment, copying, and various other types of expenses. Are there adequate means within the current library administration to help faculty who incur such costs? What are the most costly and common of these costs for library faculty researchers? The Library will establish the funding needs of current library faculty and determine how they are presently being met. We need to make sure that library faculty are knowledgeable about local and national research funding in various areas, so that we can maintain a higher profile with other faculty members in the University.

**Assessment:**

- Survey the satisfaction level of library faculty with research support
- Scholarly output of library faculty members
- Amount of research money distributed
- Number and amount of externally funded research projects

**Objective 3:**

Promote developments in scholarly communication within the university community.

**Activity 3.1:**

Gather and disseminate information about intellectual property rights to campus researchers.

**Rationale:**

Copyright issues have become increasingly more complex, particularly with the proliferation of access and ability to transform formats in the digital realm. The Library can promote successful individual and collaborative scholarly research and creative endeavors by providing education and outreach on such issues as fair/acceptable use, copyright, intellectual property, authors' rights, and other scholarly communication issues. In addition, the Library can expand discussion with campus faculty about research and initiatives that

promote sustainability and positive shifts in the modes of scholarly communication. Examples of outreach might include collaboration with the Office of Research and Sponsored Programs, workshops/forums, and the development of a copyright Web site.

**Assessment:**

- Production of library-sponsored or co-sponsored documents, Web sites, workshops, forums
- Increased level of sophistication with copyright issues among the faculty on campus

**Activity 3.2:**

Establish an Appalachian State University Institutional Repository or e-Repository to guarantee preservation and dissemination of university research.

**Rationale:**

Appropriate personnel from the organization need to explore issues and continue work to establish an IR or e-Repository with other schools in the UNC System. Steps include the production of a timeline, exploration of technical issues, policy needs, and a campus outreach and marketing plan.

**Assessment:**

- Progress on the timeline and creation of the repository
- Survey of initial interest / needs assessment
- Usability testing on the interface
- Establish benchmarks for how the repository will be populated



## Strategic Direction III: Engagement

### Objective 1:

Provide students, faculty, and staff with opportunities to learn other cultures, peoples and systems.

#### Activity 1.1:

Evaluate our collections to address diversity and coverage of international issues. Develop library collections appropriately, in multiple formats and languages as well as materials.

##### Rationale:

Appalachian State University has a growing international and multicultural student enrollment and an increase in recent immigrant students and faculty members and their families. If our collections are more diverse in their content, formats and languages, we will attract a greater diversity of patrons and have a greater chance to accommodate the needs of each and every patron.

##### Assessment:

- Assess circulation and current holdings and acquisitions of materials under a broad definition of diversity
- Identify areas to target for our diversity efforts based on current and anticipated campus interests and needs; measure progress on these areas
- LibQUAL+ results on information control

#### Activity 1.2:

Inventory our current contribution to a diverse campus climate and organize cultural events, displays, and activities in collaboration with other campus units.

##### Rationale:

The Library serves as a learning center and a public venue. Therefore it is an ideal place for displays (including book displays, posters, banners, etc.) and cultural events which serve to promote diversity, international issues, and relevant library resources.

##### Assessment:

- Inventory our current activities (e.g. number of activities held each year; participants reached; current activities on campus where we do not participate but should) and create targets for future participation

**Activity 1.3:**

Investigate international exchanges of personnel, resources, and information with other libraries, particularly with ASU partnership institutions.

**Rationale:**

Given the university commitment to an international focus as a key strategic goal, the importance of outreach to international libraries cannot be underestimated. The Library can help achieve the university's goal by increasing our international awareness through exchange of experience, skills, and resources with academic libraries abroad. The Library can work directly with peer institutions or through the Office of International Education for suggestions and feedback on proposed activities.

**Assessment:**

- Inventory our current activities and relationships (e.g. librarian involvement in the ALA International Relations Roundtable, International Federation of Library Associations and Institutions, IFLA) and create targets for future participation

**Objective 2:**

Provide outreach to K-12 public school teachers and library media specialists in the local community.

**Activity 2.1:**

Develop a "resource" room in the IMC equipped with a computer and software, an Artwaxer, laminator, die-cut machine and patterns, and other educational support equipment.

**Rationale:**

Outreach to the K-12 community reinforces Appalachian's commitment, collaboration, and support of public school educators, many of whom are Appalachian alumni and their students. At the UNC System level, the president has given us a mandate to participate more with the K-12 pipeline in order to impact higher education and the state economy.

The University of North Carolina System has asked each university to do better at reaching out to students early on to help them become academically prepared for higher education. A scaleable way to do this is by reaching out to K-12 teachers in our local community and helping them educate the next generation of Appalachian graduates.

**Assessment:**

- Establish objectives based on a needs assessment
- Assess the reach of the program: of the potential participants, number of those utilizing these services
- Surveys of participants on improvement in the quality of their teaching because of our support; improvements in student achievement

**Activity 2.2:**

Provide K-12 local teachers with community borrower cards at no cost.

**Rationale:**

A scaleable way to improve the K-16 educational system is by reaching out to K-12 teachers in our local community and helping them educate the next generation of Appalachian graduates.

**Assessment:**

- Establish objectives based on a needs assessment
- Assess the reach of the program: of the potential participants, how many utilize services
- Surveys of participants on improvement in the quality of their teaching because of our support; improvements in student achievement

**Objective 3:**

Acquire and promote library materials which promote curiosity, individual interests, and lifelong learning.

**Rationale:**

A university education strives to spark curiosity in self-discovery, interactions with others, and ways to enact change at all levels. Materials which allow the student to discover and/or broaden their own personal interests, opinions, creativity, and imagination often fall outside of standard curriculum and graduation requirements.

**Assessment:**

- Assess circulation and current holdings and acquisitions of materials which enhance lifelong learning
- Identify areas to target for lifelong learning based on current and anticipated campus interests; measure progress on these areas
- Amount of outreach (e.g. displays, promotional strategies, talks to campus groups)
- LibQUAL+ results on information control

**Objective 4:**

Evaluate and enhance current outreach efforts to increase Library use among campus, distance learning, and community user communities.

**Rationale:**

The Library already implements many outreach activities and collects statistics pertaining to those activities. By evaluating what already exists, the Library can then discard what does not work and improve upon what does. By reviewing current Library outreach programs and implementing standards for those and future programs, the Library will become more efficient and effective in increasing the use of its services.

The Library will review the outreach activities of various teams, and develop and conduct a survey of all current outreach initiatives and their effectiveness. Additionally, the Library will survey and assess the outreach activities of other area libraries to determine possible areas of collaboration and avoid unnecessary areas of service overlap. After reviewing the results of the survey, the Library will recommend a general outreach program for the Library and how to improve current outreach activities and incorporate them into the general program. General guidelines are needed for outreach materials to ensure that all teams deliver a consistent message.

**Assessment:**

- Impact of outreach efforts; correlate goals and progress with the balanced scorecard model
- Additional measures from peer-reviewed studies in library journals
- LibQUAL+ results on affect of service

### Objective 5:

Determine which internal needs could be assisted by offering library-related service learning opportunities to students.

**Rationale:**

Providing service learning opportunities for students, including service learning for credit, could provide students with meaningful experiences in a higher education setting while tackling some Library projects that need additional planning and creativity. Examples include the creation of a marketing plan, grant writing, conducting focus groups, doing a needs assessment, or working on Web content and design. Experiencing in-depth engagement will give us a strong connection with students, and meet some of the Library's needs, opening up new opportunities.

**Assessment:**

- Number of teams who can develop a meaningful service opportunity
- Significance of the impact on student learning outcomes



## Strategic Direction IV: Effectiveness

### Objective 1:

Increase the level of fluency in technology applications in order to develop a technology oriented library culture.

#### Rationale:

A productive workforce must possess and apply a common set of technology skills to manage the increasingly technical requirements of a modern academic library. By enhancing and applying their technological fluency, library personnel will streamline work, be more productive, and better serve the Appalachian State community.

All personnel will maintain base-level competencies in:

- Microsoft applications (Word, Excel, PowerPoint)
- E-mail management (e.g. creating folders, signature files, assigning programs to open files)
- Setting browser preferences (e.g. cleaning cache)
- PC troubleshooting and file maintenance
- Installing software from ASU Applications Explorer
- Printing and troubleshooting
- Basics of connecting to a wireless network

In addition, some specialized or advanced-level competencies may include:

- Web 2.0 / Library 2.0 applications (e.g. blogging, wikis)
- Course management systems (e.g. Moodle)
- Project management tools (e.g. MS Project)
- Database management (e.g. MySQL, Access)
- Digital image editing (e.g. Photoshop)
- Web authoring tools
- Citation management software (e.g. Endnote, RefWorks)
- Statistical package for research (e.g. SPSS)
- Scanning
- Microformats
- Classroom control system (e.g. SynchronEyes)
- Integrated library system (e.g. Millennium)
- Advanced Web development skills (e.g. CSS, database management tools)

**Assessment:**

- Individual self evaluations and team annual reports will include evidence of enhanced technology skills development through workshop attendance, self-paced learning, etc.
- Individuals and teams will include evidence of the application of new technology skills and how it makes their work more effective.
- Team members will hold each other accountable for skill development particular to their job functions.
- On the organizational level, assessment will revolve around the library administration's commitment to technology training. Assessment will reflect the number of training workshops promoted and/or made available, the attendance of library personnel at training workshops or self-directed learning tutorials, and the amount of time/money granted for individuals to participate in technology training.
- Preliminary and follow-up surveys of library staff and faculty may be considered to assess the perceived technical skill base.

**Objective 2:**

Implement a unifying assessment and measurement model that will be applied across the library organization.

**Rationale:**

The Balanced Scorecard model "balances" four unique perspectives to inform strategic decisions. The perspectives are:

1. Patron
2. Financial
3. Internal Process
4. Learning and Growth

The Balanced Scorecard model provides a measurement framework to align mission and strategy with consensus driven goals. At present, the University Library lacks a unifying model of assessment that is applicable across teams. Data gathered within teams tends to stay within the team and does not inform strategy of the organization as a whole. Teams may not be gathering the "right" data to inform decisions or provide evidence of student learning and program outcomes. The Balanced Scorecard approach will help to align the Library with the University-level administrative focus on student learning and program outcomes.

Organizations can benefit from planned measurement and description of their performance. At the same time, organizations are complex and effectiveness is difficult to define and demonstrate, apart from a few simplistic measures. A reasonable approach is to experiment with a variety of measures, both quantitative and qualitative, for assessing performance.

**Assessment:**

Initial assessment will focus on the acceptance and implementation of the Balanced Scorecard model. After implementation, the Balanced Scorecard measures will become the assessment model that drives strategic decisions. The implementation period and action plan includes the following phases:

1. introduce the concept and approach to library personnel;
2. confirm the library mission and strategy;
3. ask teams to select indicators, measures, and appropriate targets;
4. identify and gather needed data for team indicators;
5. use the performance measures to improve decision-making;
6. communicate findings to constituencies.

The measures will be evaluated and reworked annually on the team and organizational levels. Moreover, the scorecard results will be posted on the Web to facilitate discussion and promote our efforts.

### Objective 3:

Hold library personnel to a high standard of professional conduct, including effective communication and user service, and regularly refresh the organization's commitment to these standards (see Appendix A).

#### Activity 3.1:

Adopt a standard of core values for all employees (see Appendix A).

##### Rationale:

A suite of core values sets the stage for an organizational culture that is responsive both to the external user and to fellow library employees.

Internal user service and communication are often overlooked but remain necessary within a library organization. How quickly and thoroughly do individuals and teams respond to requests for information or assistance? How quickly are projects completed when multiple teams are involved and dependent on one another?

##### Assessment:

The Library will be able to assess that the set of core values has been presented for discussion among library employees and then approved and adopted. These standards may then be used as talking points in staff and faculty evaluations.

#### Activity 3.2:

Provide an orientation period for all new employees – students, staff, faculty, and adjunct faculty – to the library organization as well as an orientation to the core values expected in all employees.

##### Rationale:

An inclusive orientation for all new personnel will introduce our library's values which cross all teams. Committing to a set of standards will help make the Library more responsive to internal work relationships, which indirectly and directly influence our external user focus.

##### Assessment:

- Survey satisfaction among new employees about the level of orientation they received immediately following orientation and again after six months to a year of employment

#### Activity 3.3:

Provide ongoing refreshers on the Library's standard of professional conduct, including effective communication and user service.

##### Rationale:

A public service organization needs to consistently remind itself of its reason for existence. Ongoing efforts to maintain high communication and user focused service skills will promote a high standard of quality in the Library. Some training may take the form of a video or presentation at Library-wide meetings. Other training may be team-specific. Teams will have the flexibility to make available and/or require more training

as needed. In this case, the team will be able to count the offered sessions and the attendance.

**Assessment:**

- Number of training sessions offered and participation
- Post-training response about benefits
- LibQUAL+ results on affect of service

### Objective 4:

Effectively promote the Library to the Appalachian State community and beyond.

**Rationale:**

The need for a position dedicated to marketing has been articulated at least as far back as the 2004 *Model Library Services Task Force Report*. By having a position dedicated to public relations, marketing, and promotion, we can stretch the power of the PR Committee and the efforts of individual teams as they attempt to promote their work. While public relations is a part of everyone's job, having a single "go-to" person will help:

- dictate best practices, offer guidelines, implement standards, and build toolkits for all the librarians and staff;
- design and publish attractive print publications and signage on a rotating basis;
- coordinate a strategic marketing plan for the Library;
- support writing projects with a PR aspect such as press, blog, reports and award applications; and
- act as central coordinator for Library-wide events or announcements of new services.

**Assessment:**

- Creation and support of new position
- Development of measures to assess our marketing impact

## Appendix A Core Values\*

### Accountability

Accepts responsibility for own actions and decisions and demonstrates commitment to accomplish work in an ethical, efficient, and cost-effective manner. Takes responsibility for self-development; actively and continuously learns; efficiently monitors progress on projects. Takes responsibility for knowing, understanding, and correctly implementing library policies.

### Adaptability

Adjusts planned work by gathering relevant information and applying critical thinking to address multiple demands and competing priorities in a changing environment. Adapts readily to changes in policy and procedures; responds well to changes in direction and priorities; leads change; adjusts to changes in priorities; helps others adapt to change; modifies or changes strategies to ensure the best chance of success.

### Communication

Effectively conveys information and expresses thoughts and facts. Demonstrates effective use of listening skills and displays openness to other people's ideas and thoughts. Presents information or data in a format that is efficient and understandable; writes clearly, logically, and concisely; identifies the critical issues to be communicated in complex situations.

### Cooperation

Takes responsibility for completing work assignments and projects on time, while offering assistance to those who might need help in their commitments. Responds appropriately and in a timely manner to requests for assistance from co-workers. Communicates an impending missed deadline to those who may be affected. Shows flexibility in adapting to scheduling, work loads, and work flow. Makes a positive contribution to solving problems.

### User/Quality Focus

Anticipates, monitors, and meets the needs of users and responds to them in an appropriate manner. Demonstrates a personal commitment to identify users' apparent and underlying needs and continually seeks to provide the highest quality service and product to all users. Responds appropriately and in a timely manner to users' requests; builds and maintains a positive rapport with users; takes reasonable risks in satisfying user needs; anticipates user needs and expectations across functions. Ensures user needs are consistently satisfied with the highest standards of quality.

### Inclusiveness

Interacts appropriately with all members of the campus and community, without regard to individual characteristics. Demonstrates a personal commitment to create a hospitable and welcoming environment. Fosters respect for all individuals and points of view. Treats all users and coworkers with respect; shows sensitivity; displays inclusive behavior; uses empathy; integrates new library staff members into the organization; encourages and utilizes different viewpoints; fosters an environment based on fairness and respect.

### Occupational Knowledge / Technology Orientation

Demonstrates the appropriate level of proficiency in the principles and practices of one's field or profession. Demonstrates a commitment to continuous improvement, to include understanding and application of technology (hardware, software, equipment, and processes). Demonstrates mastery of job skills and necessary applications; displays willingness to take on more challenging work; willingly shares new technology with others; stays informed of new practices, trends, developments, and standards in the field.

**Team Focus**

Works cooperatively and effectively with others to achieve common goals. Participates in building group identity characterized by pride, trust, and commitment. Commits to meeting team objectives; participates in group discussions; gives and accepts feedback openly and constructively; supports group decisions and outcomes through actions and communication; looks for areas of common agreement; effectively negotiates and compromises.

**Leadership**

Communicates the Library's mission in ways that gain the support of others. Mentors, motivates, and guides others toward goals. Takes, supports, and encourages reasonable risks; views failures and mistakes as learning opportunities; envisions future trends; takes ownership in decision making and problem solving; coaches, inspires, and empowers people to achieve strategic objectives.

**Problem Solving / Decision Making**

Recognizes patterns, draws logical conclusions, and makes recommendations for action. Uses a well-ordered approach to solving problems and sound judgment in making decisions despite obstacles or resistance. Gathers, utilizes, and interprets relevant information when making decisions; considers the risk, benefit, and impact of decisions; balances reasonable risks against potential gain in making decisions and proposals.

\* This document adapted from the following:

1. University of Nebraska Lincoln Libraries Core Competencies  
<http://www.unl.edu/libr/staffdev/core.shtml> (accessed 4.23.2007)

2. Davenport Public Library Standards of Library Customer Service <http://www.davenportlibrary.com/Default.aspx?PageID=170> (accessed 4.23.2007)

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