

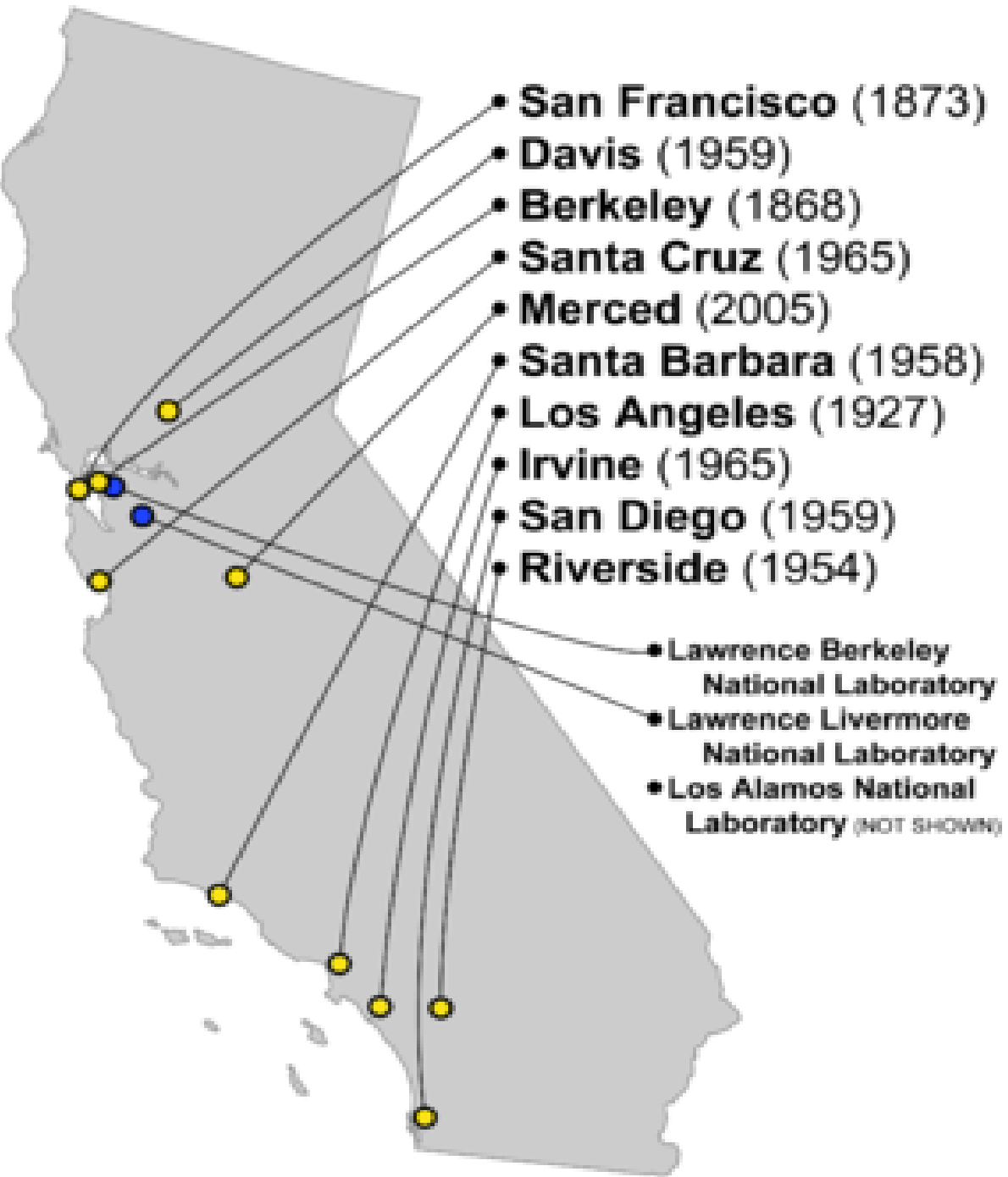
# Strategic Planning at the UCLA Library: Preparing for Our Future

Susan E. Parker, Ph.D.

Associate Dean, University Library, UCLA Library

June 16, 2016

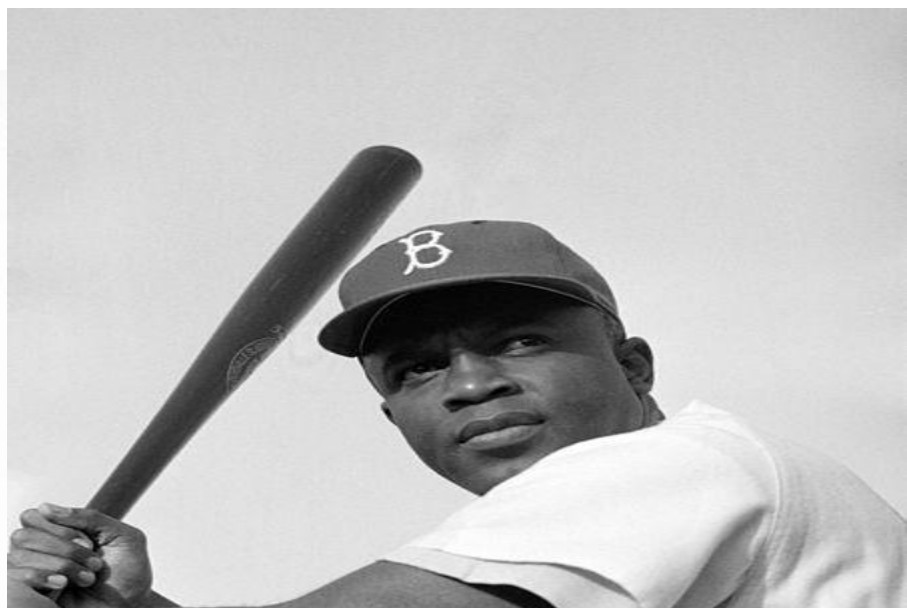
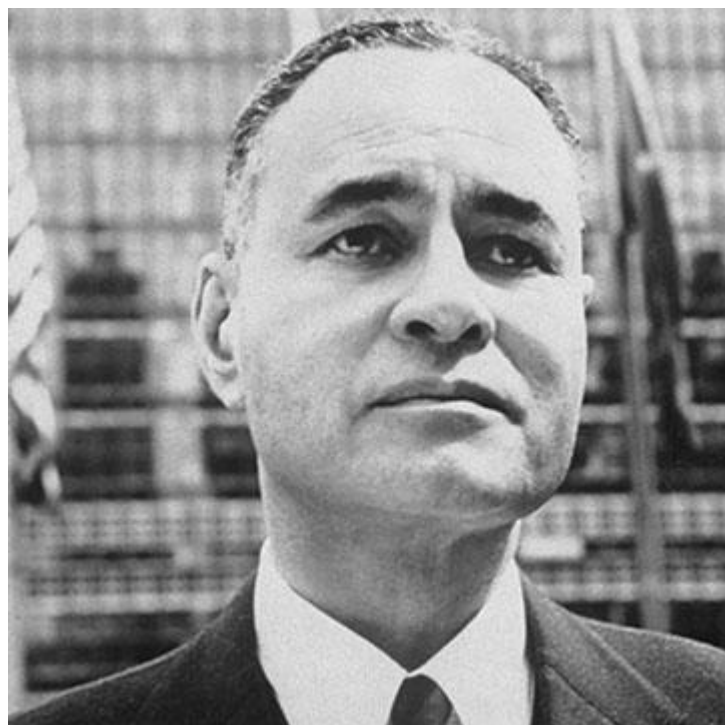
Library Society of China, Yinchuan











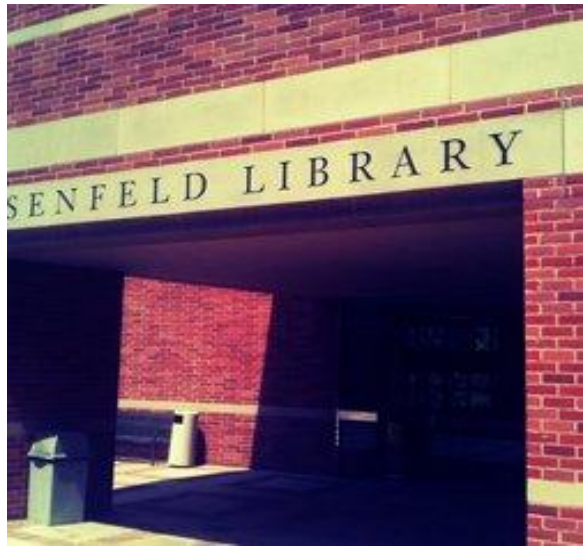








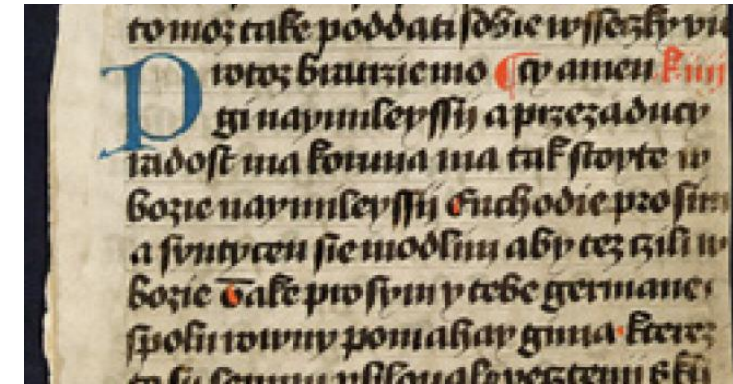








# UCLA Library











University of California  
**Southern Regional Library Facility**







# participating groups



- Committee on Library and Scholarly Communication (COLASC)
- Students and Faculty (Library users)
- Key Partners and Affiliates
- Cross-representational Steering Committee
- Working Groups (6) – Each group focused on a goal
- Library Staff – Updates and input at key junctures, along with remote and asynchronous opportunities for input (e.g. surveys, bunchcut site, working group outreach)
- Library Leadership

**UCLA LIBRARY** Library Strategic Planning 2015

**Pages**

Blog

SPACE SHORTCUTS

- Meeting notes
- Shared links
- File lists

CHILD PAGES

- Library Strategic Planning 2015
  - Strategic Planning Home
    - Background Info/Reports
    - Steering Committee
    - Suggested Readings
  - 4 more child pages
  - Create child page

Pages / Library Strategic Planning 2015

Edit Watch Share

# Strategic Planning Home

Created by Kathleen Brown, last modified on Nov 02, 2015

## News and Notes

- Strategic Plan on Confluence**

A complete copy of the Library's Strategic Plan, including goals and goal actions, is available to Library staff members on Confluence at <https://docs.library.ucla.edu/x/tACgC>.

Please note that the Mission and Vision statements remain under review by the Strategic Planning Steering Committee and Cabinet. They will be updated here in their final form once this work is completed.

Other Confluence pages contain drafts of the work of different Working Groups, as well as comments. These remain available, but the Confluence page noted in this message is provided to offer a complete view of the Strategic Plan. Soon there will be a web site, a booklet, and even a video, but until these are available, please use this Confluence page to refer to the completed goals and goal actions.

- September 29 Staff Town Hall with Brightspot**

The session slides and photos of the session notes are now available at <https://docs.library.ucla.edu/x/ilGKC>.

- September 2 Staff Town Hall with Brightspot**

The Zoom recording of the session, along with slides and photos of the session notes, are now available at <https://docs.library.ucla.edu/x/hM9yC>.

- Comments? Questions? You can email the entire Strategic Planning Steering Committee at [spsc@library.ucla.edu](mailto:spsc@library.ucla.edu).

## Suggested Readings

Do you have ideas for articles that may be of interest?

Please send them to [kathleenbrown@library.ucla.edu](mailto:kathleenbrown@library.ucla.edu) and they'll be added to the [Suggested Readings](#) page, and be sure to visit the page to see what your colleagues are recommending.

## Documents

- UCLA Library Strategic Plan
- May 29 Online Town Hall recording, slides (online or download PDF), and chat log
- May 5 Town Hall recording, slides, and "From, To, How" activity documentation
- Brightspot Project Process: Timeline and Visit Schedule (Note: This is an old version. The project timeline has now been extended slightly.)
- Strategic Plan Staff Input Activities and Approach (5/1/2015)

Like 2 people like this

No labels

file:///C:/Users/sparker/Downloads/UCLA-Library-Town-Hall-150827%20(3).pdf

# project process

Timeline: April, May, June, July, Aug., Sept., Oct.

1. Groundwork
2. Research and Engagement
3. Goal Definition
4. Organizational Design
5. Action Planning
6. Budget and Prioritization
7. Final Plan Development
8. Implementation and Assessment

brightspot | UCLA Library Strategic Plan

Town Hall Update 4

5:06 PM 5/14/2016

+ ASPIRATIONAL  
TEACH EVERY LEARNER"



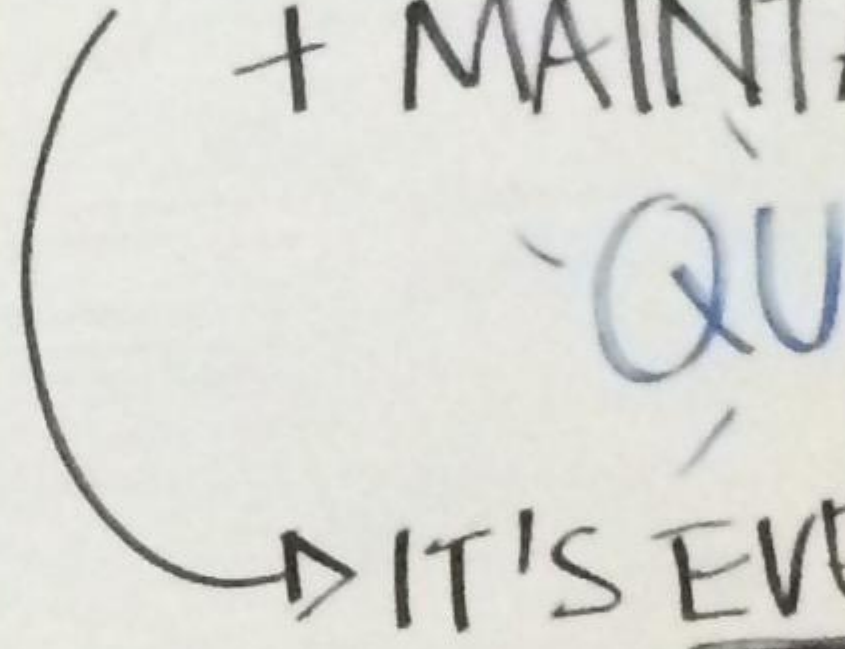
ACTIVE GLOBAL+LOCAL

AP/CNXN BTWN  
ACTIONS

COLLABORATION!!

CHALLENGE

IMPLEMENT  
+ MAINT



QU

→ IT'S EVERY

MISSION → S

# UCLA Library goals:

## 1. Valued, Vital, and Visible Role

The UCLA Library defines and demonstrates our unique value and impact to the campus such that the Library is recognized as an essential hub for multidisciplinary collections, services, and expertise, with user needs at the forefront.

## 2. Effective Information and Resource Access

The UCLA Library enables coordinated and effective acquisition, discovery, usage, and preservation of materials across a breadth of subjects and formats, calibrated to the needs of the University's diverse constituencies and balanced with our role in the global information community.

## 3. Heart of University research

The UCLA Library will actively engage as an expert partner in the research lifecycle through organized, connected and scalable services.

## 4. Platform and Catalyst for Teaching and Learning

The UCLA Library is both a platform and a catalyst for teaching and learning at UCLA. We are at the forefront of innovative pedagogy, supporting all Library users in the discovery and creation of new knowledge.

## 5. Culture of Engagement and Leadership in the Library

The UCLA Library, in support of a shared purpose, fosters collaboration, open communication, collegial and transparent decision-making, and a culture of organizational learning and leadership.

## 6. Productive and Excellent Space

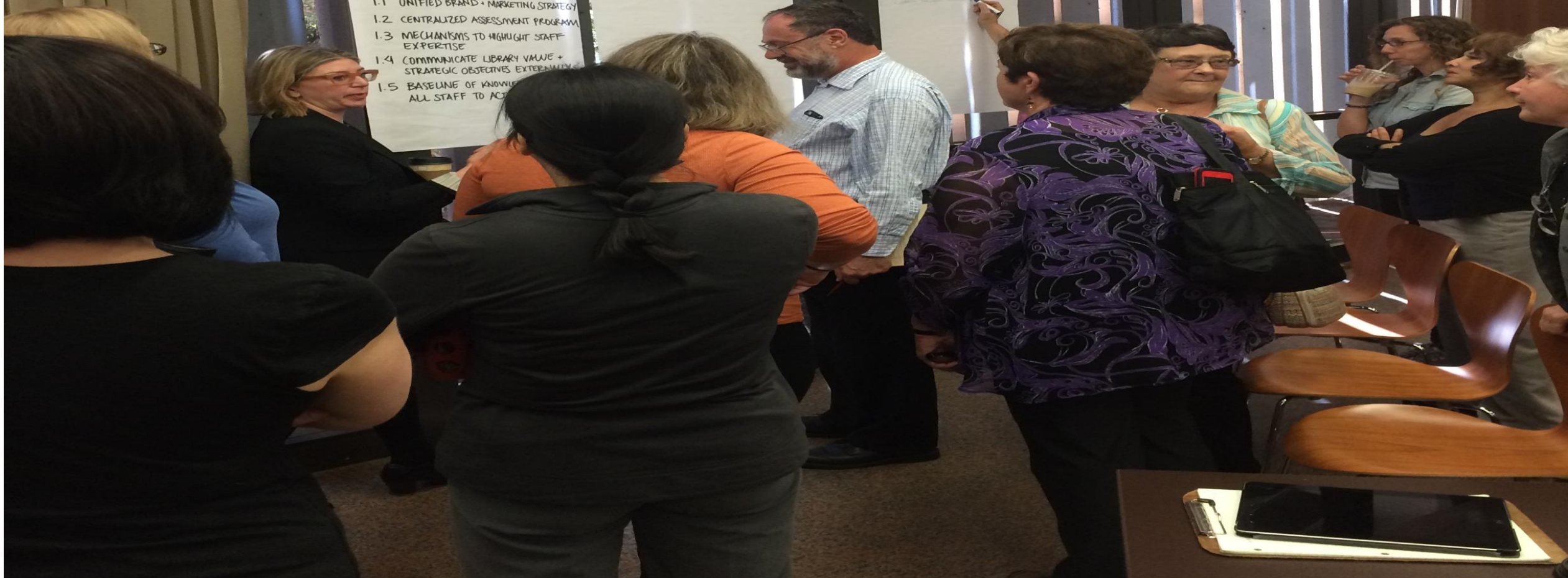
The UCLA Library creates and provides exemplary spaces for our users, staff, and collections while ensuring sufficient capacity, variety, and flexibility to enable partnerships and to build campus community. Our environments catalyze and fuel inspiration for intellectual pursuits in all forms.



1. VALUED, VITAL + VISIBLE ROLE  
ACTIONS:  
1.1 UNIFIED BRAND + MARKETING STRATEGY  
1.2 CENTRALIZED ASSESSMENT PROGRAM  
1.3 MECHANISMS TO HIGHLIGHT STAFF EXPERTISE  
1.4 COMMUNICATE LIBRARY VALUE + STRATEGIC OBJECTIVES EXTERNALLY  
1.5 BASELINE OF KNOWLEDGE FOR ALL STAFF TO ACT

1. WHAT ARE YOU EXCITED ABOUT?

WHAT ARE YOU ALREADY WORKING ON THAT RELATES TO THIS GOAL?



# guiding principles



Put users first



Advance a global and diverse perspective



Support open access to knowledge



Align with University & UC Initiatives



Create and foster partnerships



Establish and support a culture of innovation

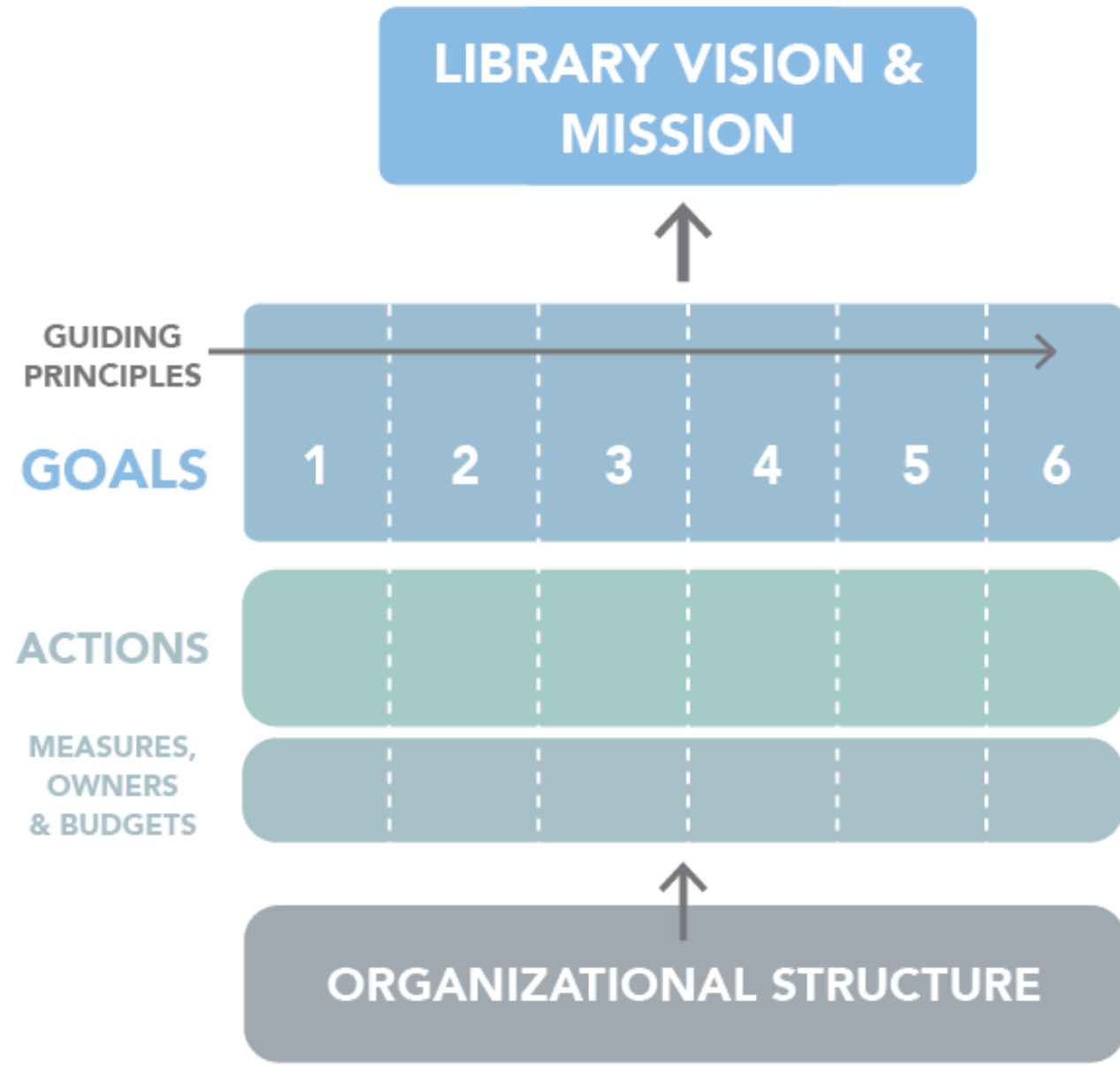


Empower staff and coordinate efforts



Leverage assessment and feedback

- what's in the strategic plan



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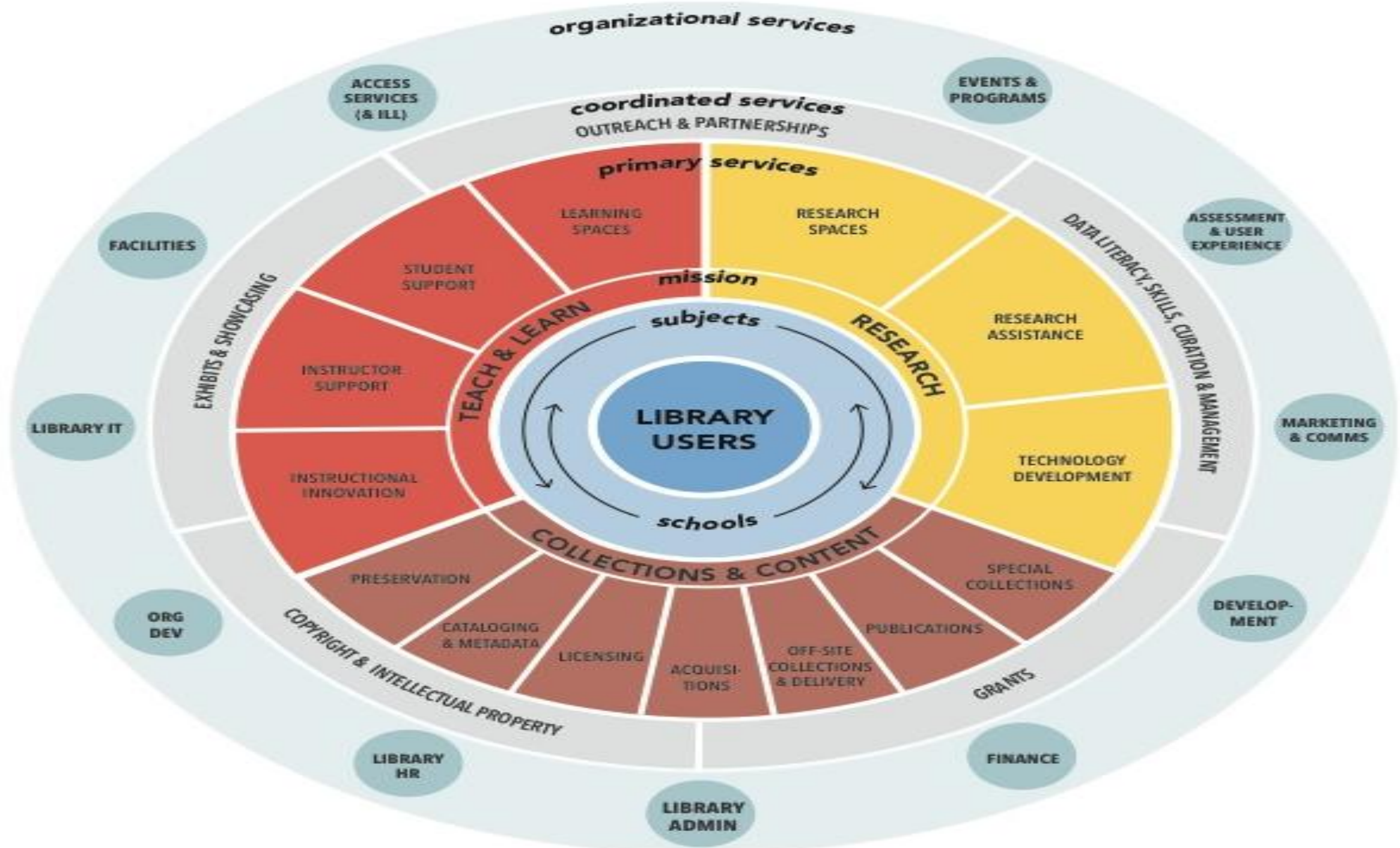
Establish and support a culture of innovation



Empower staff and coordinate efforts



Leverage assessment and feedback





Siloed organization



Collections  
(physical, discrete)



Celebrating  
collaboration



Web of interconnections





# Culture of Engagement & Leadership

Created by Jessica Mentessoglu, last modified on Sep 17, 2015

## 5.0 The UCLA Library, in support of a shared purpose, fosters collaboration, open communication, collegial and transparent decision-making, and a culture of organizational learning and leadership.

- We strengthen and grow organizational leaders who are holistic, visionary, inclusive, and innovative within their roles in the Library and in their roles as campus partners and thus able to realize the UCLA Mission statement.
- We cultivate an environment of inclusiveness, innovation, and transparency in decision-making at all levels by providing rationales and workflows.
- We collaborate in a user-centric organizational structure that partners with campus functional and academic divisional areas, facilitating interdisciplinary and cross-campus initiatives.
- We work in an environment of continual learning, assessment, and data-driven evaluation to ensure effective and innovative use of resources.

### Actions

- 5.1 Transform the way in which working groups, task forces, and committees form and operate in order to support accountability and efficiency in team-based work.

5.1 Transform Working Groups				
Steps	Potential Owners	Start	Status	Example Outcomes
5.1.1 Establish, define, and post clear formation and operational parameters and decision-making capacity for all working groups, task forces, and committees.	A small 2-3 person task force appointed by the UL (possibly including Angela Horne and/or John Riemer already working with Management Council on implementing ULMA recommendations).  This task force would work closely with Management Council to implement the above steps to effect change throughout the Library. Possible stakeholders or partners include any cross-unit group, LAUC, LSA, and Cabinet.	October, 2015	Planning	<ul style="list-style-type: none"> <li>• detailed inventory of all groups (scope of authority, membership, etc)</li> <li>• posted agendas and decision logs</li> </ul>
5.1.2 Expand opportunities for staff to participate in Library-wide working groups, task forces, committees through a defined and inclusive selection process.	see 5.1.1	see 5.1.1	Planning	establish an inclusive process for applications for committees and task groups
5.1.3 Establish clear expectations for all team-based work including working groups, task forces, committees including their leaders and members.	see 5.1.1	see 5.1.1	Planning	<ul style="list-style-type: none"> <li>• establish a process for periodic assessment for group performance, existence</li> <li>• define expectations for group participants and leaders</li> </ul>

5.2 Develop a comprehensive professional development and continuing education program related to management and leadership in libraries and higher education, establishing a culture of leadership excellence and managerial...



- **Goal 1: Valued, Vital, and Visible Role**

- **Current State:**

- The UCLA Library is a valuable resource for the campus community. It has both specialized and broad collections, services, and expertise. It creates connections on campus, acting as a neutral space and partner for students and faculty. Unfortunately, not all users are aware of the breadth of expertise and services available to them, and many students view the Library first as a place to study and access articles rather than as a partner in research, teaching, and learning. According to library staff and users, Library priorities aren't clearly communicated internally or externally, and this is made more difficult by inconsistent branding and communications. For example, the libraries have approximately 39 different social media accounts. However, progress is being made in educating users on Library offerings. As an example, last year, a Powell Library / TLS (Teaching & Learning Services) Outreach initiated program led to a more than 250% increase in tours that orient users to services and spaces throughout the Library system.

- **Goal:**

- The UCLA Library defines and demonstrates our unique value and impact to the campus such that the Library is recognized as an essential hub for multidisciplinary collections, services, and expertise, with user needs at the forefront.
- We are a sought-after partner and visible contributor to UCLA's mission of education, research, and service.
- Our value is communicated through a unified brand identity and a comprehensive marketing strategy.
- Our staff are ambassadors for the Library, and their accomplishments are publically celebrated.
- Our activities are assessed through a transparent, user-centered, evidence-based approach.

- **Proposed Actions:**

- 1.1 Develop a unified brand identity and comprehensive marketing strategy to communicate the Library's value.
- 1.2 Develop a unified, centralized, coordinated assessment program to facilitate improvements throughout the Library.
- 1.3 Develop mechanisms to highlight staff expertise.
- 1.4 Communicate the Library's value and strategic priorities to internal and external audiences and partners.
- 1.5 Establish a baseline of knowledge for all staff (including student staff) and train them such that anyone can serve as an ambassador of and guide to Library services and resources.

*UCLA Library Vision*

**A SEAMLESS GLOBAL NETWORK  
EVOLVING TO CONNECT PEOPLE,  
IDEAS, AND INFORMATION.**

**UCLA LIBRARY MISSION:**

As a vibrant nexus of ideas, collections, expertise, and spaces that illuminates solutions for local and global challenges, the UCLA Library advances the University's research, teaching, and public service missions by empowering and inspiring communities of learners and researchers to discover, access, create, share, and preserve knowledge.



**10**

**LIBRARIES**



The logo features the text "UCLA Library" centered on a blue background. The background is decorated with a white geometric pattern of thick lines forming a grid of squares and rectangles of various sizes. A small, solid blue circle is positioned in the upper-left corner, and a white curved shape is visible in the lower-right corner.

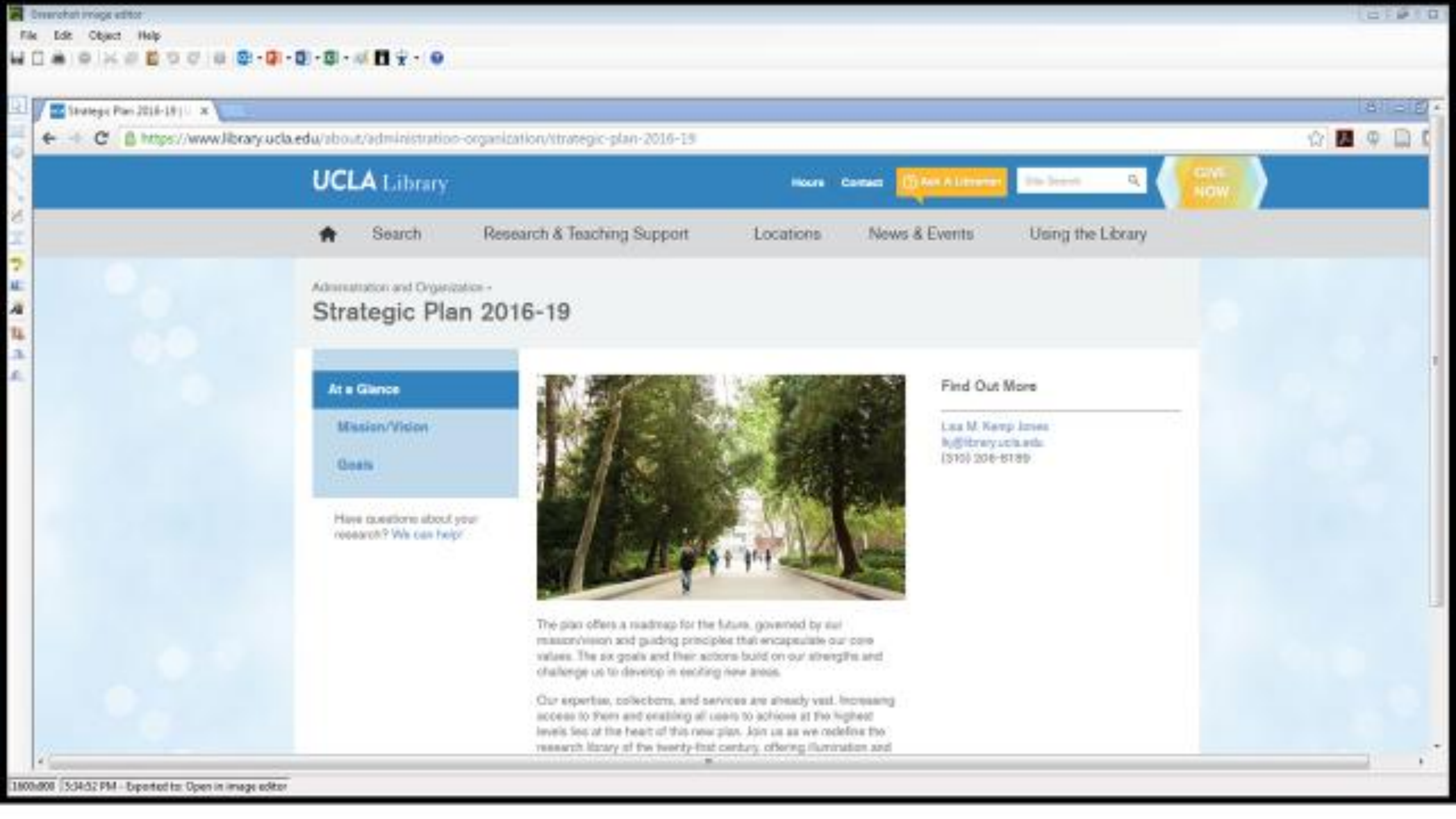
**UCLA** Library

# Goal Implementation Teams

**SPI Needs You!**

**Application period has ended for Goal Program Managers – watch this space for info on how to participate in the Goal Implementation Teams!**

<b>#</b>	<b>Goal</b>	<b>Team Short Name</b> ( <i>examples here – TBD by actual team</i> )	<b>Goal Program Manager</b>	<b>Cabinet Sponsor(s)</b>
1	Play a Visible, Vital, and Valued Role in UCLA's Life	Visibility Team		Stephanie Kimura, Dawn Setzer
2	Ensure Effective Access to Information and Resources	Access Team		Sharon Farb
3	Function as the Heart that Enables Research to Thrive	Research Team		Todd Grappone
4	Become a Platform and Catalyst for Innovation in Teaching and Learning	T/L Team		Judy Consales
5	Develop a Strong Culture of Engagement and Leadership	Engagement Team		Ginny Steel
6	Provide Excellent Spaces for People to be Productive	Space Team		Susan Parker



## Strategic Plan 2016-19

## At a Glance

[Mission/Vision](#)[Goals](#)

Have questions about your research? We can help.



The plan offers a roadmap for the future, governed by our mission/vision and guiding principles that encapsulate our core values. The six goals and their actions build on our strengths and challenge us to develop in exciting new areas.

Our expertise, collections, and services are already vast. Increasing access to them and enabling all users to achieve at the highest levels lies at the heart of this new plan. Join us as we redefine the research library of the twenty-first century, offering illumination and

## Find Out More

Lisa M. Kemp Jones  
lj@library.ucla.edu  
(310) 206-8189

# Mission/Vision

- At a Glance
- Mission/Vision**
- Goals

Have questions about your research? We can help!



Photograph by Reed Hutchinson

## Mission/Vision

The UCLA Library creates a vibrant nexus of ideas, collections, expertise, and spaces in which users illuminate solutions for local and global challenges. We constantly evolve to advance UCLA's research, education, and public service mission by empowering and inspiring communities of scholars and learners to discover, access, create, share, and preserve knowledge.

## Guiding Principles

**Put users first:** Understand the needs, preferences, and motivations of current and potential users to impact strategies and actions around spaces, services, and collections. Involve users in developing, implementing, and evaluating ideas to ensure their perspectives inform decision-making.

**Advance a global and diverse perspective:** Foster an inclusive, open, international perspective by grounding efforts and activities within UCLA's community of diverse scholars, located in a vibrant city renowned for its culturally rich and varied inhabitants.

**Support open access to knowledge:** Play an essential role in supporting the broadest possible public access to knowledge and the historical record. Strive to make our print collections and electronic resources easily accessible to leverage the role of open access in the advancement of knowledge.

**Align with and lead UCLA and UC initiatives:** Connect to, partner in, and direct campus and university initiatives, ensuring the Library stays relevant and important in the future while creating opportunities for development.

**Create and foster partnerships:** Expand our reach by utilizing our role as a "connector" to develop new and broader partnerships. Consider the ecosystem of resources, services, and spaces across campus to identify and create complementary and enhanced offerings.







				Cost of additional staff as needed			
king to be	core	2016-2017	1FTE 2 year temporary project manager to manage task force; 3 hours per week from task force members	Cost of additional staff as identified by task force	Cost of additional staff as identified by task force	Cost of additional staff as identified by task force	\$100,000
upport needs to use.	core, enhancement	2016-19	TBD by owner of 2/5				\$200,000
	enhancement and exploration	2016-19	Planning; see 6.5	Reassign existing Library staff; renovation; furniture; equipment			\$100,000
	exploration, core	2016-19	Training and release time				\$25,000
earch	exploration, core	2016	Produce materials; maintain outreach	Materials and outreach	Materials and outreach	Materials and outreach	\$5,000
	exploration	2016-19	Inventory and gap analysis of stakeholders and library services		Joint workshops and events related to grant proposal writing, presenting research		\$5,000
long-	enhancement and exploration	2016-19	Build tech-data-visualization hub (IR)	Pilots and pursue dedicated funding, grants		Data mining; Data Archive data replicated from Dataverse (long term preservation)	\$200,000
the	exploration	2016-19	Create tiered service model; identify staff and tools; publicity; documentation				\$5,000
ion and	core, exploration	2016-19	Organizational consultant (\$75,000): training	New positions (3?), post masters		Staff time for mentoring	\$350,000



light at end of tunnel  
 moving forward  
 ACCESS TO ILLUMINATION



bridge to ?  
 bridge w/in + w/o  
 community  
 bridge = connector



maze  
 mysterious



bridge  
 risk-taking  
 aspirations  
 hard work



diversity  
 people/  
 resources  
 methods



joy/celebration  
 collaboration


UCLA Lib

UCLA Library

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## Using the Library



**At a Glance**

- [Access & Privileges](#)
- [Borrow, Renew, Return](#)
- [Computers & Computing Services](#)
- [CLICC Laptops & Services](#)

**Access & Privileges**

- [Library Cards ▶](#)
- [Conduct in the UCLA Library ▶](#)
- [Visit the UCLA Library ▶](#)
- [Borrower Responsibilities ▶](#)
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**Borrow, Renew, Return**

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- [Fees and Fines ▶](#)
- [Interlibrary Loan/Document Delivery ▶](#)

Have questions about your research? We can help! ▶

# THANK YOU!

Susan E. Parker, Ph.D.

Associate Dean, University Library, UCLA Libraries

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