



Restructuring Action Plan

Queen's University Library

July 2010

Prepared by the Library Change Steering Group:

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INTRODUCTION

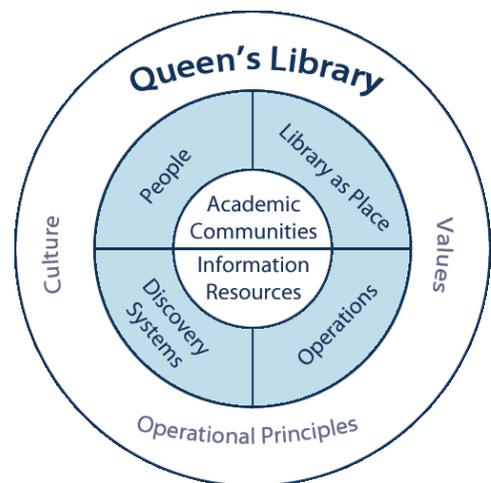
Queen's University is home to one of Canada's finest academic research libraries. Featuring outstanding research collections, nationally renowned services and staff, and stunning physical facilities that are a hallmark of the student experience, Queen's Library is the only university library in Canada to have been recognized with an A+ for overall satisfaction in the 2010 Globe & Mail University Report Card.

The Library's success is due in part to the remarkable adaptability of the organization. Seizing upon opportunities presented by a rapidly evolving information and technology landscape, the Library has embraced dramatic changes in our approaches to acquiring and facilitating access to information resources in support of academic programs. Continuous advances in information technology have also made it possible to manage ongoing staffing reductions through substantial restructuring and reorganization, from 19 departmental and campus libraries in the early 1990s to 6 campus libraries in 2010.

Queen's today is at the threshold of academic revitalization. The present context of deep budget pressures and associated fiscal constraint poses additional challenges, but also invites creativity and innovation in maintaining and advancing Queen's national and international reputation for excellence. An excellent library is integral to this endeavour.

Driven by the goal to sustain a user-centred library within the present reality of budget constraint, the Library Change Steering Group (LCSG) was formed early in 2009 with a mandate to articulate a viable library infrastructure which will be able to continue to support the evolving needs of the varied academic communities comprising the Queen's community over the years to come.

Guided by the core values and strengths represented in the Library Change Framework of 2009 (Appendix 1) and the figure at right, LCSG has overseen an Operations Review and the work of a variety of Task Groups to arrive at a Library restructuring action plan. This plan makes provisions for an efficient and flexible organizational structure that keeps academic communities and information resources at the core of its activities as it realigns staff resources for the current and future digital age. This restructuring positions the Library to develop new strategic directions to support the learning and research priorities emerging from the University's forthcoming Academic Plan.



PRIORITIES AND ACTIONS

The analysis of Library operations and services conducted in the past year provided over sixty recommendations from several task groups: Information Services (ISTG), Interlibrary Loans (ILLTG), Technical Services and Selection to Access Workflow Analysis of R2 Consulting LLC (R2/TSTG), Collections and Space Planning (recommendations forthcoming) and Operations Review (OR).

Reviewed all together, these recommendations suggest a new organizational structure and the priorities and actions outlined in the table below. The specific recommendations to be acted upon can be found in Appendix 2.

The groups and individuals named in the 'responsibility' column are explained in the New Organizational Structure section following the table.

At this point the timeframes are deliberately broad; more precise project plan timelines will be determined when the individuals and groups responsible are in place.

Priorities	Actions	Timeframe	Responsibility
Organizational Structure	Implement an organizational structure that supports a shared allegiance to common goals (Recommendations 1-3)	July 2010 - Sep 2010	Office of the University Librarian
People	Identify new staff roles, reporting relationships and required skills (Recommendations 4-7, 52)	Sep 2010 - Oct 2010	Leadership Team
	Identify key staff roles and succession planning required	Sep 2010 - Oct 2010	
	Compile a skills inventory of current cohort	Nov 2010	
	Develop and implement staff training and development program (Recommendation 8)	Dec 2010 - June 2011	
	Begin filling new staff roles	Jan 2011	
	Develop methods of recognizing and celebrating professional contributions and achievements	Jan 2011 - June 2011	
Operations	Amalgamate human resources, financial and facilities operations (Recommendations 9-26)	July 2010 - Apr 2011	Office of the University Librarian
Information Resources	Establish and maintain system-wide technical services priorities, policies and procedures (Recommendation 27)	Sep 2010 - Aug 2011	CDERM and CMS Division Heads
	Systematize and prioritize electronic resources (Recommendation 28)		
	Implement new monograph workflows (Recommendation 29)		
	Implement new print serials practices (Recommendation 30)		
	Establish benchmarks and key measures (Recommendation 31)		
	Improve collections selection and assessment methods (Recommendation 32)		
	Streamline ILL processes (Recommendations 33-43)		

Discovery Systems	Implement changes to ensure the Library's web presence and access to information resources are expertly and efficiently designed and managed (Recommendations 44-46)	Sep 2010 - Aug 2011	DS Division Head
	Develop new infrastructure efficiencies (Recommendations 47-50)		
Academic Communities	Assess academic community needs emerging from the University's Academic Plan (Recommendation 51-53)	Nov 2010 - Aug 2011	AS Division Head
	Based on needs assessment, explore new approaches to teaching, learning and research support and new strategic directions, e.g. e-research (Recommendations 54-56)		
Library as Place	Prepare for development of a Library master space plan with cost-benefit analysis and scenarios, e.g. plan project and stakeholder involvement	July 2010 - October 2010	Office of the University Librarian
	Develop Library master space plan with cost-benefit analysis and scenarios, drawing on academic services needs assessment and strategic directions (Recommendations 57-59)	Nov 2010 - October 2011	Leadership Team
Communications	Affirm a clear vision for restructuring and future directions, highlighting the Library's unique expertise and active engagement with academic communities (Recommendation 60)	July 2010 - August 2011	Office of the University Librarian

NEW ORGANIZATIONAL STRUCTURE

Many of the recommendations emerging from the analysis of the past year indicate a need to develop a new organizational structure that supports a shared allegiance to common goals. The objectives guiding the development and implementation of a new organizational structure are:

- Enable the continued delivery of excellent services within financial constraints
- Realign staff resources to better manage and provide access to electronic collections
- Provide focused leadership and authority for system-wide functions, below the level of the senior Library administration
- Enable decision-making informed by strong cross-system consultation, listening and respect
- Promote close productive working relationships within units
- Promote strong alignment with all of the University's Faculties, Schools and research institutes
- Enable creativity and innovation in the development of discipline-specific support for teaching, learning and research
- Reduce the size of the administrative structure to reflect reductions in the size of the staff complement (from 162.8 FTE in January 1998, when the current structure was introduced, to 123 today)
- Reduce the number of standing committees (teams and working groups) and time spent in Library meetings
- Retain a 'learning organization' philosophy of continuous staff development, engagement and teamwork

ORGANIZATIONAL CHART

The organization will be administered by the University Librarian and one Associate University Librarian, with the assistance of the administrative officers (Human Resource, Business, Communications). The new top level organizational chart appears in Appendix 3.

FUNCTIONAL DIVISIONS

There will be four functional divisions, led by Division Heads, with system-wide authority for setting policies and procedures for functions wherever they may be performed across the system. The divisions are:

- **Academic Services (AS):** This division will sustain an outward focus and active engagement with academic communities. To a large extent, AS will be a discipline-based organization of librarians and library technicians doing what is commonly called public service: reference, teaching, collections and research support and faculty liaison. AS will also include public services that cross all disciplines and it will provide system-wide leadership on issues of information literacy, scholarly communication and information management.
- **Collections Management and Services (CMS):** This division will encompass many of the traditional technical and access services functions. Coordinated system-wide management of print resources will occur in CMS, along with fast-track workflows (mainstream and shelf-ready materials) segregated from specialized tangible content (new monographs that are not shelf-ready, out-of-print and rare monographs, music CDs, DVDs, music scores, government publications and anything else that falls outside the mainstream). CMS will also include a roving collections support function to respond to limited term collections projects for which dedicated support is needed.
- **Collection Development and E-Resource Management (CDERM):** This division brings two primary functions into a single reporting line and focuses the appropriate level of attention on this vital stream of content. It has overall responsibility for collections policies, collections assessment, managing acquisitions budget allocations, vetting e-resource contracts and purchases and ensuring full and timely access to online content. In addition to managing electronic-only resources, it will handle invoice processing and renewals for print serials and standardize handling of those titles that remain dispersed.
- **Discovery Systems (DS):** This is the current Systems unit, renamed to emphasize the user experience as its *raison d'être*. In addition to the existing systems agendas, this new division will, in collaboration with AS, CMS and CDERM, be responsible for: understanding current research behaviour and user preferences; search interface design; accuracy, completeness, customization and intuitive usefulness of search results, methods and speed of access to electronic content; continual optimization of Library resources as targets for external search engines like Google and WorldCat; technical leadership for digital initiatives such as special collections digitization.

UNITS

ACADEMIC SERVICES

Within the Academic Services Division, there will be several discipline-based units relating to the University's structure of Faculties and Schools, led by Unit Heads.

It should be noted that although these units exist as separate physical entities in different buildings across the campus, that is not the reason for their existence. They are administrative units because of the discipline-centred leadership required to build essential connections to the varying academic needs of the University. The number and nature of these units may change depending on the outcomes of academic planning and further Library planning. For now, the discipline-based units are:

- Engineering and Science, connecting with the Faculty of Engineering & Applied Science and the Faculty of Arts and Science
- Humanities and Social Sciences (currently Learning & Research Services), connecting with the Faculty of Arts and Science, the Faculty of Graduate Studies' School of Policy Studies and School of Urban & Regional Planning, the School of Business and the School of Religion
- Education and Teacher Resource Centre, connecting with the Faculty of Education (The current Heads of the Education Library and the Teacher Resource Centre will retain their current roles and responsibilities)
- Health Sciences, connecting with the Faculty of Health Sciences
- Law, connecting with the Faculty of Law

In addition to these discipline-based units, there are several other units and services under the Academic Services umbrella. Once the Division Head is in place, each of these will need to be examined in light of various factors:

- Library Services for Students with Disabilities is a Library-wide service experiencing significant growth in demand and the potential for even greater demand with the implementation of the Accessibility for Ontarians with Disabilities Act standards. The staffing and management of this service needs to be reviewed with the Library's funding partner, Health, Counselling and Disability Services.
- The Maps, Data and Government Information Centre (MADGIC) will be reviewed. It provides collections and expertise in much the same way that discipline-based units do, but it also serves a University-wide function. In the area of government information, the Library needs to consider current staffing needs, succession planning and the changing nature of government information. As the Library explores new demands for research data support, it will need to consider how best to leverage the expertise of staff in MADGIC. As well, maps and geographic information systems need to be considered in the context of the needs of specific academic communities, such as Geography and the School of Urban and Regional Planning, as well as the Library as a whole.
- The Queen's Learning Commons (QLC) is a collaboration of several University units. Within the Library, it falls under the umbrella of Learning & Research Services (Humanities & Social Sciences) yet it serves all disciplines. The QLC partners intend to engage in a strategic planning process in 2010/11 which will help to inform the QLC's placement and role in the Library as a whole.

- The Library's Scholarly Communications Services and Library Assessment Coordinator is taking a gradual reduction in appointment beginning July 2010 and retiring in 2013. There will need to be succession planning for the two separate aspects of leadership, coordination and support in his position: scholarly communications services such as e-theses and the institutional repository, and assessment programs.

The Jordan Special Collections and Music Library does not fall within Academic Services at this time, but it will be reviewed. Pending completion of this review, Associate University Librarian Barbara Teatero will continue to have administrative responsibility for Jordan. The review will include: a cost-benefit analysis of preservation activities and the location of the Music collection and services; future prospects for special collections in relation to the University's Academic Plan; digitization opportunities and priorities; leadership succession planning.

CMS, CDERM AND DS

Within each of these divisions, the organizational chart depicts a number of functions, many of which are new and will need to be staffed from the existing Library staff cohort once the Division Head is in place. Two of these functions exist now as units (Access Services and Collections Development). The others are included in the organizational structure as important new concepts to guide the Leadership Team as it considers staff roles needed to enable implementation of recommendations relating to information resources management and discovery systems. Staff in the existing Central Technical Services unit will be reassigned based on this analysis.

Collection Management Services (CMS)

- Access Services
- Fast Track Acquisitions
- Specialized Tangible Content Management
- Roving Collections Support

Collection Development and E-Resources Management (CDERM)

- Collection Development and Assessment
- E-Resources Management

Discovery Systems (DS)

- Web Development
- Systems Support
- Information Systems
- Digital Initiatives

MANAGEMENT ROLES, WORKING RELATIONSHIPS AND DECISION-MAKING

The key benefits of this organizational structure are the clear decision-making authority below the level of the University Librarian and the opportunities for strong consultative working relationships. Without conscious effort, however, these key benefits could become key challenges. It is expected and essential that decisions in any one part of the organization be made with a full understanding of their impact on other parts of the organization. As well, once decisions on system-wide policies and procedures are made, it is expected and essential that they be upheld by all parts of the organization.

OFFICE OF THE UNIVERSITY LIBRARIAN

The terms Senior Administrative Team and Library Administration Office will be replaced by Office of the University Librarian (OUL). This language aligns with other University administrative offices and signals that there are new roles in our organization and that leadership occurs throughout.

Decisions regarding strategic directions, budget and personnel reside with the OUL.

UNIVERSITY LIBRARIAN

The University Librarian is engaged in the senior leadership of the University, reporting to the Provost. She provides strategic leadership for the Library, aligns funding with strategic directions, builds relationships with stakeholders and donors, and represents the Library in the local community, consortia and organizations such as the Canadian Association of Research Libraries and the Association of Research Libraries.

ASSOCIATE UNIVERSITY LIBRARIAN

The Associate University Librarian is deputy to and reports to the University Librarian. She has authority to act in the absence of the University Librarian, assists in all aspects of Library leadership, directly oversees administrative functions (human resources, staff development, finance, facilities, communications) and leads strategic initiatives that span multiple divisions and units. Current Associate University Librarian Barbara Teatero has agreed to take on these new responsibilities until June 30, 2012.

HUMAN RESOURCE OFFICER

Reporting to the Associate University Librarian, the Human Resource Officer is responsible for the development and management of a full range of human resource services and strategies required to support the vision and goals of the Library, within the University's overall human resource strategic framework. Her responsibilities include providing strategic and analytical advice to the University Librarian, Associate University Librarian, Leadership Team and Unit Heads. The Human Resource Officer supervises one support staff.

BUSINESS OFFICER

The Business Officer reports to the Associate University Librarian and is responsible for the management of the Library's budget. She participates in strategic planning and policy development for the system regarding the use of financial resources and physical facilities of the Library. The Business Officer supervises 1.5 FTE support staff and a .5 FTE library technician who assist with administrative functions.

COMMUNICATIONS MANAGER

Reporting to the Associate University Librarian and to Queen's Marketing & Communications, the Communications Manager is responsible for defining, implementing and managing internal and external communications strategies to support and enhance the promotion of Library services and resources. She provides guidance on the Library's overall communications strategy, develops specific communications programs and initiatives, provides public relations advice and guidance in media relations, coordinates Library fundraising and promotional events, and proactively supports donor relations.

LIBRARY LEADERSHIP TEAM

The Library Leadership Team consists of the University Librarian, the Associate University Librarian and the Heads of functional divisions; the administrative officers of the OUL participate as appropriate.

The Library Leadership Team makes decisions on policies that would impact multiple divisions, and provides input to the OUL for budget and personnel decisions.

DIVISION HEADS

Division Heads report to the University Librarian and provide leadership for division staff who may work in multiple locations. Division Heads have system-wide authority for standardizing related tasks and functions wherever they may be performed across the system and they have decision-making authority for division-specific policies, with input from their respective staff. They develop close working relationships with Unit Heads and consider unit needs when making decisions. Division Heads are expected to spend time in all units, for purposes of assessing needs and ensuring adherence to system-wide policies. In addition to providing leadership for their divisions, Division Heads participate in the work of the division and may retain particular areas of expertise; for example, the Academic Services Division Head may have some teaching and research support responsibilities.

Division Head positions will be filled internally. Details about the process will be communicated as they are confirmed.

UNIT HEADS

Heads of discipline-based units report to and work closely and collaboratively with the Academic Services Division Head. They maintain strong relationships with the governance and curricular bodies of their Faculties, Schools and research institutes, and with the University Librarian. Unit Heads have decision-making authority for academic services specific to their units and work collaboratively with other Unit Heads to ensure that expertise and best practices are shared across the Library system.

In the current organizational structure, Unit Heads have been members of a Management Team. This team was too large to function very effectively as either a decision-making body or a communication vehicle, and it does not exist in the new structure. It is expected that communication between Unit Heads and Division Heads will be ongoing and open and will not necessarily require a formal meeting structure to facilitate it. As well, Heads of discipline-based units will be represented in the Leadership Team by the Academic Services Division Head.

The current Heads of all the discipline-based units will remain in place. Their position descriptions will be reviewed and adjusted to reflect new working relationships.

The roles and responsibilities of other existing Unit Heads will be considered in light of the reviews of their areas, as discussed in the 'Units' section above.

COMMITTEES AND WORKING GROUPS

The roles of the current functional and support teams and working groups will mostly be filled by the functional divisions of the new organizational structure. The current teams were asked to identify groups or matters that should continue beyond June 30, 2010. They will be assigned as follows:

- Access Services Functional Team: CMS will review membership and terms of reference
- Acquisitions Budget Subcommittee of the Resources and Collections Functional Team (RCFT): CDERM will review membership and terms of reference
- Ad hoc Electronic Resources Management Group: CDERM will absorb this function
- Electronic Resources Working Group of the RCFT: The Collection Development Coordinator will continue to chair this group with its current membership and review it when CDERM is formed
- Electronic Gateway Functional Team: DS will lead initiatives and advisory functions previously falling to this team.
- Human Resources Development Support Team: The Human Resource Officer will chair a group performing staff engagement activities such as organizing All Staff meetings, and a call for volunteers will be issued after the formation of the Leadership Team. The Leadership Team will consider staff training and development as a separate matter.
- Information Services and Instruction Functional Team: AS will lead initiatives previously falling to this team, such as system-wide coordination of the Expanding Horizons workshop schedule, teaching teas, etc.
- Library Communications Advisory Committee: The Communications Manager will continue to chair this group with its current membership until it is reviewed by the Leadership Team.
- Systems Support Team: DS will absorb and retain this group with its current membership and function
- Technical Services Working Group of the RCFT: CMS and CDERM will absorb this function

The groups suggested by the recommendations from the past year will be reviewed as a whole by the Leadership Team in relation to other recommendations. For example, a web support team and the related web services collaborative need to be considered at the same time as e-resources management positions which may draw on some of the same skill sets.

The need for groups beyond those recommended will emerge over time. New committees or working groups will be managed as projects with defined time-limited mandates and will be sponsored by one of the functional divisions.

ALL STAFF

All Staff meetings will continue in the new structure. They have many purposes: to help build a shared allegiance to common goals; to provide opportunities to learn about University activities outside the Library; to share information and provide a forum for Library-wide discussion. They will continue to be scheduled regularly throughout the year.

LIBRARIANS' FORUM

The librarian cohort is a good size for focused professional discussions that serve to inform the Library's strategic directions as well as individuals' professional development. The current ad hoc librarians' meetings will become more regularly scheduled events in the new structure.

EVALUATION OF THE ORGANIZATIONAL STRUCTURE

The Leadership Team will need to consider how to determine if the new organizational structure is achieving its objectives and supporting the Library's strategic directions. A common approach to reviewing the effectiveness of an organizational structure is to gauge staff satisfaction during a formal review process, as was done twice with the current structure. Although this is a good possibility, it will also be important to do continual assessment with staff and users and through performance measures, and readjust the course as necessary. Ongoing feedback about the benefits and challenges experienced during the implementation of the new structure will be encouraged by the Leadership Team. A system of benchmarks and measures, as recommended in the technical services review, will be necessary, as well as qualitative measures. Annual review processes should also serve as opportunities to reflect on how successful the Library has been in promoting a culture of shared allegiance to common goals.

Library 2012 Change Framework

Driven by the goal to sustain a user-centred library within the present reality of deep budget cuts, Queen's University Library is undertaking a comprehensive review of opportunities and strategies to preserve the Library's core strengths while creating new efficiencies, keeping in mind the specific and varying needs of the University's diverse academic programs.

The Library needs to articulate a reinvention of itself that will take into account an operating budget reduction of 15% by 2012 and ensure a viable infrastructure capable of enduring further reductions. A Change Steering Group was formed in Spring 2009 to facilitate this process. The mandate of the Steering Group is to support the development of a planning framework and process for consultation with key stakeholders, to oversee the work of a series of Task Groups mandated to explore specific strategies for the restructuring and reorganization of particular library services, to make recommendations on comprehensive reorganization and restructuring of the Library, and to facilitate the planning process for the implementation of approved service changes.

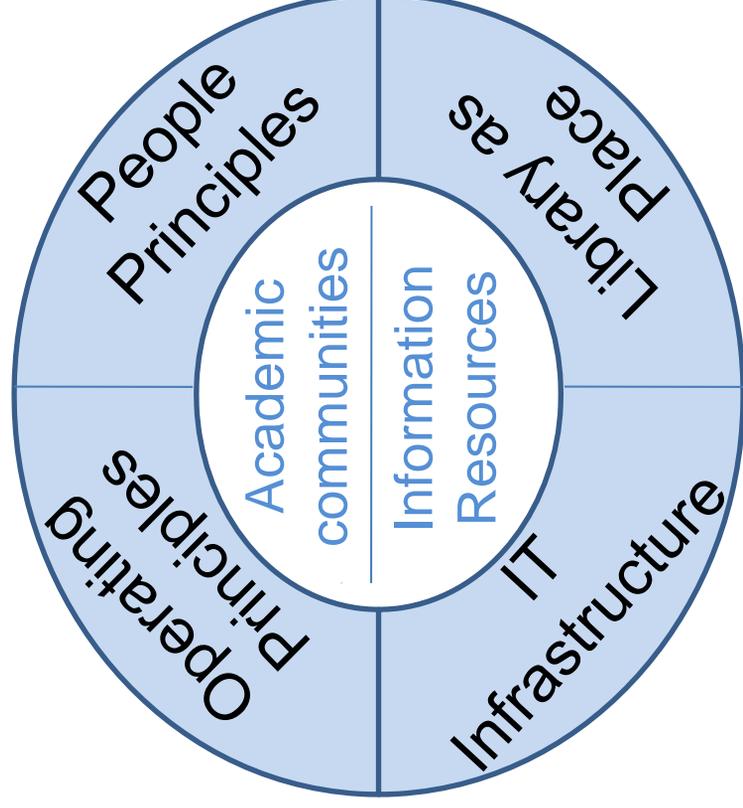
This is not a business-as-usual vision and planning exercise. While we aim to articulate a vision of the library of the future, our aspirations must be informed by our fiscal realities. Vision without funding is merely hallucination. We must harness our knowledge and experience to maintain the best possible academic library for Queen's University with the resources we have.

Like other areas at Queen's, the Library is grappling with substantial issues requiring thorough analysis before a detailed vision can be developed. We can at this time only affirm our strengths and core focus, our values, and our environmental assumptions and parameters. The following *Change Framework* is therefore a skeletal draft, describing the foundational ideas for the change planning process. It is intended to stimulate discussion and to guide the Task Groups in the exploration of specific strategies for creating new efficiencies while maximizing existing (preserving core) strengths to best support the needs of the Library's diverse user communities.

Key library stakeholders and members of the academic communities at Queen's will be consulted as appropriate through various Task Group initiatives. Comments and questions about the consultation process and the following Change Framework may be directed at any time to Paul Wiens, University Librarian.

The Library Change Steering Group (Jackie Druery, Wayne Jones, Suzanne Maranda, Sharon Murphy, Jane Philipps, Jennifer Smith (Resource), Barbara Teatero, Martha Whitehead, Paul Wiens)

Library 2012 Change Framework



Strengths/ Focus	Library Values	Assumptions/ Parameters	Broad Approaches	Explicit Strategies
<p>Operating principles</p>	<ul style="list-style-type: none"> Accountability Risk taking Innovation Partnerships Best practices Continual assessment Collaboration User-centred services 	<ul style="list-style-type: none"> 15% fund reduction University priorities must drive Library priorities Priorities must be imperatives to change Funding is linked to priorities Climate of uncertainty in the University and associated anxieties Consortial partnerships Differential distribution of resources across University Limited revenue generation 	<ul style="list-style-type: none"> Excellence Library is core to the University's mission, and information services and resources are fully integrated into research, teaching and learning activities Address differential distribution 	
<p>People principles</p>	<ul style="list-style-type: none"> Staff contributions Respect Staff wellness Consultation Collaborative decision-making and problem-solving Participation Professional development Research (professional practice) Sharing of expertise Flexibility Learning Organization Communication of direction and changes 	<ul style="list-style-type: none"> Our people are a foundational resource for Library services Strong service orientation (/difficulty saying "no" to users) Must focus on priority activities (can no longer do some things) Pressures to meet increasing user demand with fewer staff = stress Resilient staff, but uncertainty and anxiety through change period Changes not just within Library, but across University (e.g., QUASR) 	<ul style="list-style-type: none"> Professional growth and support Succession planning Cross-training and reassignment to ensure productivity and efficiency 	
<p>Information Resources</p>	<ul style="list-style-type: none"> Access to information Collections stewardship Special collections Quality over quantity 	<ul style="list-style-type: none"> Information resources and access are valued by faculty and students and are critical for research, teaching and learning 	<ul style="list-style-type: none"> Development, assessment, maintenance and access to information resources are the foundation of all priorities 	

		<ul style="list-style-type: none"> The Library is an integral part of the fabric of networked information sources Increasing use of virtual collections and services Acquisition, processing, organization and making information resources accessible (Technical Services) are integral to public services Management of electronic resources is resource-intensive Special collections are valued by faculty and students Growth in graduate and professional programs and enrollment Growth in interdisciplinary programs Changing publishing models More vendor-supplied services Need to maximize benefits of consortial purchasing 	<ul style="list-style-type: none"> Strategically reduce print and take consortial approach to stewardship (Thunder Bay Agreement) Balance print and electronic (browseable print collection still important) Efficient infrastructure Ongoing rigorous assessment and demonstration of ROI 	
<p>Integration with academic communities</p>	<ul style="list-style-type: none"> Service excellence User-centred Tailored service Expertise (& sharing of it) Academic integrity Teaching Learning Inquiry Research & Innovation 	<ul style="list-style-type: none"> Queen's is research-intensive Increased blending of research and learning Continued emphasis on content specific curriculum integration Future of academic programs is unknown: flexibility, nimbleness, responsiveness needed Academic programs and delivery changes Increased independent learning Increased individual & group project-based learning Growth in graduate & professional programs 	<ul style="list-style-type: none"> Liaison librarians with assignments based on university's research support requirements and defined learning outcomes Fewer & coordinated service points Emphasis on virtual library & coordinated development Coordinated education development and learning technologies expertise (e.g. online tutorial design) 	

		<ul style="list-style-type: none"> Stable undergraduate enrolment Interdisciplinarity Impact on learning outcomes (demonstrate ROI) Impact of learning outcomes (e.g. Undergraduate Degree Level Expectations) More self-service Virtual environments and face-to-face interaction are both important Demand for reference services varies by discipline/Faculty 	<ul style="list-style-type: none"> Coordinated research services expertise (e.g. data management, scholarly communications) Promoting greater awareness of information resources Manage user expectations through change process 	
<p>IT Infrastructure</p>	<ul style="list-style-type: none"> IT innovation Virtual realm 	<ul style="list-style-type: none"> Library must take advantage of continual changes in IT Library is integrated with the global information network, facilitating information dissemination as well as acquisition Queen’s near-term focus on admin systems and teaching & learning systems (e.g., QUASR, course management systems) 	<ul style="list-style-type: none"> Expertly planned, designed, built and managed Connected and aligned with campus, consortia and beyond 	
<p>Library as place</p>	<ul style="list-style-type: none"> Intellectual and social community space Safe place Learning spaces Virtual spaces 	<ul style="list-style-type: none"> Continued importance of “broader learning environment” Need both interactive and quiet study spaces 	<ul style="list-style-type: none"> Spaces are reflective of learning communities Variety of spaces tailored to user needs/multi-use spaces Space planning 	

The following recommendations were made by the groups reporting to the Library Change Steering Group in 2009/10. They were reviewed and approved by the LCSG and the Library Management Team, but it is expected that some may change as they are reviewed and implemented by Division Heads and the Leadership Team.

Library Change Task Group Reports

ILLTG	InterLibrary Loans and Document Delivery Task Group
ISTG	Information Services Task Group
OR	Operations Review
R2/TSTG	Technical Services Task Group & R2 Consulting (Integrated Report)

ORGANIZATIONAL STRUCTURE

1. Create four new divisions, and assign a division head for each **R2/TSTG IV.1**
2. Retain a small number of critical interdepartmental working groups **R2/TSTG IV.4**
3. A new organizational structure should include these principles or goals:
 - o retain ‘academic program’ units with direct responsibilities for developing and integrating information services within our academic communities
 - o draw together ‘academic program’ units as one administrative group to provide system-wide leadership and coordination for information services
 - o create cross-Library working groups (‘collaboratives’) to provide broad engagement in strategic themes **ISTG 3**

PEOPLE

4. Prioritize staffing for the new E-Resources Management Unit **R2/TSTG IV.2**
5. Create a new librarian position for collection evaluation and assessment **R2/TSTG IV.3**
6. Identify specific matters requiring system-wide expertise and assign responsibility for each expertise to a liaison librarian who will act as an expert resource and mentor for people across the Library system as a whole for a defined period of time. These experts could emerge from and lead collaborative working groups. The Library Administration should work with unit heads and librarians to establish responsibilities and qualifications for particular expert roles, ensuring a fair process in filling roles and ensuring a reasonable distribution of workload for individuals and units. **ISTG 5**
7. The Library Administration should review the roles and responsibilities of technicians in the context of the recommendations of all the change process reviews, and if feasible adapt some positions to include information services responsibilities and develop a comprehensive staff training and development program to support these new roles. **ISTG 6**
8. In a new organizational structure, form a group or groups devoted to facilitating staffing training and development programs aligned with strategic directions identified in the Library change process. **ISTG 7**

OPERATIONS

9. Centralize supplies budgets **OR 1.1**
10. Centralize telecom charges/orders **OR 1.2**
11. Centralize all chargeable FIXIT requests except at Bracken **OR 1.3**
12. Retain current non-chargeable FIXIT practices **OR 1.4**
13. Standardize ILL/Document Services expenses and recoveries **OR 1.5**
14. Standardize Document/Photocopy Services recoveries **OR 1.6**
15. Standardize miscellaneous revenues **OR 1.7**
16. Retain some circulation desk cash functions at this time **OR 1.8**

17. Centralize Library fines accounts following QUASR student system implementation (early 2011) **OR 1.9**
18. Centralize lease agreements and security contracts **OR 1.10**
19. Centralize petty cash **OR 1.11**
20. Reduce the number of procurement cards **OR 1.12**
21. Centralize casual account and payroll **OR 2.1**
22. Centralize hiring of student casuals **OR 2.2**
23. Implement consistent documentation for student casuals **OR 2.3**
24. Explore scheduling software for student casuals **OR 2.4**
25. Explore a method of providing a basic level of training to student casuals across the system **OR 2.5**
26. Implement an exit survey process for student casuals **OR 2.6**

INFORMATION RESOURCES

27. System-Wide Policies, Procedures, Priorities
 - a. Strengthen the QUL identity and shared allegiance to common goals **R2/TSTG III.1**
 - b. Modify the QUL administrative organization accordingly **R2/TSTG III.2**
 - c. Establish and promote QUL system-wide policies and priorities **R2/TSTG III.3**
 - d. Require conformity **R2/TSTG III.4**
 - e. Establish system-wide format preferences **R2/TSTG III.5**
 - f. Consolidate vendors and systems to create a QUL-wide infrastructure **R2/TSTG III.6**
 - g. Standardize the use of Voyager – utilize Voyager as fully as possible **R2/TSTG III.7**
 - h. Do not require direct-ship approval plans for units and/or disciplines that are disinclined **R2/TSTG III.8**
 - i. Maximize shelf-ready receipts for monographs **R2/TSTG III.9**
 - j. Systematically honor “hold” and “notify” requests **R2/TSTG III.10**
 - k. Minimize duplication system-wide **R2/TSTG III.11**
 - l. Adopt a more restrictive gifts policy **R2/TSTG III.12**
 - m. More readily accept available catalogue copy without modification **R2/TSTG III.13**
 - n. Minimize physical processing of print materials **R2/TSTG III.14**
 - o. Centralize ordering & file management; distribute all post-ordering tasks **R2/TSTG III.15**
 - p. Establish a system-wide approach to quality control and performance evaluation **R2/TSTG III.16**
28. Systematize and Prioritize Electronic Resources
 - a. Recognize e-resources as the QUL mainstream system-wide workflow **R2/TSTG V.1**
 - b. Establish e-resources management as a QUL-wide operation **R2/TSTG V.2**
 - c. Establish QUL-wide criteria for print to electronic-only conversion **R2/TSTG V.3**
 - d. Develop a systematic approach to e-resources discovery and infrastructure **R2/TSTG V.4**
 - e. Make strategic decisions about e-journal discovery and access **R2/TSTG V.5**
 - f. Consolidate the e-resources management infrastructure **R2/TSTG V.6**
 - g. Prioritize and consolidate e-resources staffing **R2/TSTG V.7**
 - h. Prioritize system-wide e-resources tasks over local print/multimedia tasks **R2/TSTG V.8**
 - i. Consolidate activity around a single e-resources knowledgebase **R2/TSTG V.9**
 - j. Consolidate with a single subscription agent **R2/TSTG V.10**
 - k. Use the ERM as the system of record for e-resources transactions **R2/TSTG V.11**
 - l. Implement SUSHI to automate most gathering and compilation of usage statistics **R2/TSTG V.12**
29. Monographs Workflows
 - a. Consolidate with a single primary system-wide vendor **R2/TSTG VI.1**
 - b. Maximize orders to the primary vendor **R2/TSTG VI.2**
 - c. Transfer standing orders to the primary vendor **R2/TSTG VI.3**
 - d. Maximize approval plan automatic shipments **R2/TSTG VI.4**
 - e. Adopt a single fund for approval plan purchases **R2/TSTG VI.5**
 - f. Mandate electronic selection and record export; eliminate all paper from the process **R2/TSTG VI.6**
 - g. Eliminate pre-order searching for primary vendor material **R2/TSTG VI.7**
 - h. Eliminate “shadow” order systems and accounting systems **R2/TSTG VI.8**
 - i. Optimize receiving process for shelf-ready **R2/TSTG VI.9**

- j. Expand shelf-ready services to the fullest extent possible **R2/TSTG VI.10**
 - k. Accept most vendor/OCLC/NLM cataloguing copy as is **R2/TSTG VI.11**
 - l. Accept duplicate call numbers **R2/TSTG VI.12**
 - m. Analyze the value of custom Cutting for Canadian Literature, Health Sciences, Education **R2/TSTG VI.13**
 - n. Promote electronic reserves **R2/TSTG VI.14**
 - o. Develop a strategy for individual electronic monographs **R2/TSTG VI.15**
30. Print serials
- a. Continue to reduce print subscriptions in favour of electronic **R2/TSTG VII.1**
 - b. Consolidate with a single subscription agent for mainstream materials **R2/TSTG VII.2**
 - c. Move monograph standing orders to Monographs **R2/TSTG VII.3**
 - d. Eliminate check-in and claiming for some titles **R2/TSTG VII.4**
 - e. Reduce or eliminate binding for titles with secure electronic backfiles **R2/TSTG VII.5**
 - f. Increase the extent of EDI invoicing **R2/TSTG VII.6**
31. Benchmarks and Key Measures
- a. Adopt weekly key measures **R2/TSTG VIII.1**
 - b. Eliminate manual tallies whenever possible **R2/TSTG VIII.2**
 - c. Measure and control quality via sampling **R2/TSTG VIII.3**
32. Retain collection development responsibilities in the roles of liaison librarians and provide guidelines and support to make selection processes more efficient. Suggestions from the staff survey include:
- o provide easier access to information needed for decision-making:
 - o accurate holdings information (e.g. e-book records in QCAT)
 - o easy-to-generate reports to see/compare holdings (rather than having to check titles manually)
 - o usage statistics, especially for e-books
 - o ILL request data
 - o budget allocation and balance for area, to keep track of spending
 - o provide a template for managing sources that need to be checked for ordering each year
 - o ensure liaison librarians see departmental/faculty requests
 - o fine-tune approval plans in some areas
 - o give librarians a better understanding of CTS workflows. **ISTG 8**
33. Provide system-wide mechanisms to support collections assessment activities and continually update them to keep pace with changing needs. **ISTG 10**
34. Investigate with Library and Archives Canada a protocol to ensure that Queen's University Library holdings in Amicus are accurate. **ILLTG 1**
35. Maintain a watching brief as changes at CISTI that impact on interlibrary loan/document delivery services unfold. **ILLTG 2**
36. Maintain a watching brief and contribute as much as is possible as discussions unfold between COU and Purolator about the future of interuniversity transit of library resources. **ILLTG 3**
37. Continue to advocate for the principles of sharing and cooperation with its OCUL partners and maintain a watching brief on the impact of the University of Toronto direct borrowing policy on the Queen's community. **ILLTG 4**
38. Do not extend interlibrary loan/document delivery privileges to Queen's alumni and community borrowers at this time. **ILLTG 5**
39. The Education Library interlibrary loan/document delivery service point should be maintained as long as staffing levels permit. **ILLTG 6**
40. Bracken Library should continue to use Docline for interlibrary loan/document delivery rather than implementing RACER and employing the Docline workaround in RACER at this time. **ILLTG 7**
41. The fee structure for lending outside Queen's University Library should be simplified and standardized across the system. **ILLTG 8**
42. The \$3.00 per article charge should be retained. A \$3.00 charge should be instituted for monographs that have been borrowed but not picked up by the requestor in addition to retaining the \$3.00 charge for articles not picked up. The need for materials should be reconfirmed with the patron when the cost to borrow is \$50.00 or more. **ILLTG 9**

43. The Resources and Collections Functional Team should keep a watching brief on the Centre for Research Libraries and communicate service enhancements to the Queen's community. **ILLTG 10**

DISCOVERY SYSTEMS

44. Establish a project to assess and redevelop aspects of Library website content relating to common reference questions, such as the 'How-to & Help' content. **ISTG 12**
45. Create a web services collaborative to provide Library-wide oversight for the ongoing development of the Library's web presence. This collaborative would provide guidance and advice on web strategies for the web support team and web-related projects as they arise. **ISTG 16**
46. Create a web support team that would provide a public services perspective to all web content and coordinated management of the Library's web presence. Similar in concept to the systems support team, this group would include several library technicians who would provide extensive web support and reside in units outside Systems, as well as one or more designated public service librarian(s) (including the e-learning expert), the Web Development Librarian, the Web Systems Assistant and the Library Communications Manager. As well the group could solicit advice from the Queen's Learning Commons student assistants as needed. Responsibilities for the group would include:
- provide coordinated webpage creation/maintenance support for all Library units
 - create and maintain web content other than subject guides, discipline-specific content and curriculum content authored by liaison librarians
 - in consultation with the web services collaborative, develop a website content strategy that plans for the creation, publication and governance of useful, usable content
 - in consultation with the web services collaborative, define web policies and guidelines to ensure quality and accessibility standards are being met
 - conduct user testing, content audits and web usage analysis
 - in consultation with the web services collaborative, make decisions about when to create, revise or remove areas of the website
 - provide technical support for web-related projects and services led by other groups **ISTG 17**
47. Discontinue laptop lending program **OR 3**
48. Investigate opportunities provided by self-check machines **OR 3**
49. Explore whether it is more cost effective to lease desktops rather than purchase them **OR 3**
50. Explore opportunities to optimize the number of public workstations provided, the software images provided and mechanisms for supporting them **OR 3**

ACADEMIC COMMUNITIES

51. The Library should implement an ongoing assessment program to continually verify academic needs in each of our academic communities. Program planning should begin as soon as possible, and in the fall take into account the new Academic Plan. As part of this planning, Library units should work together to map the Library's current involvement on academic unit committees, gaps to be addressed and administrative-level support needed to achieve greater integration. **ISTG 2**
52. Continue to have liaison librarian positions, with the current blend of responsibilities, assigned to academic units. Library units should work together to define the core competencies of these positions and their professional development needs. Each unit should be responsible for ensuring that services offered are sustainable within available human resources. **ISTG 4**
53. Investigate ways to ensure greater consultation between academic units and the Library in the academic program development and approval process, to ensure a mutual understanding of collections and service implications and funding. **ISTG 9**
54. Retain responsibility for the development, delivery and assessment of reference services within home units but provide system-wide mechanisms for encouraging experimentation with new reference models in collaboration with academic units. For example, librarian-faculty pairs could apply for small research grants to develop and test a new approach to addressing reference questions relating to large-class research assignments. **ISTG 13**
55. In the new organizational structure, 'Academic Programs' (if such a group exists) should sponsor an information literacy collaborative to address the following ideas and more:

- in the assessment program for information services, establish new measures for the impact of instruction services that go beyond simple quantitative measures (e.g. number of classes taught) and emphasize strategy and qualitative results
 - map information literacy needs and instruction: gather the statements of learning outcomes and standards in all academic programs (e.g. undergraduate degree level expectations); document current models for mapping information literacy standards in those programs; discuss what information literacy elements are common across programs and could be developed collaboratively across Library units; share information across Library units and with all academic communities
 - develop recommendations for approaches to different information literacy instruction requirements (e.g. teaching in a classroom without technology)
 - establish a dynamic site ('information literacy toolkit') where librarians can share curriculum mapping, instruction approaches and course materials, including learning exercises and objects for re-use and adaptation
 - facilitate librarians' access to professional development opportunities relating to identified needs (e.g. online course development and e-learning)
 - develop stronger connections between the Queen's Learning Commons programs and units across the Library system
 - develop strategies for liaison with the Centre for Teaching and Learning (e.g. ask CTL for a designated contact for the Library and provide them with a Library contact who would draw on others as appropriate for particular projects) **ISTG 14**
56. In the new organizational structure, 'Academic Programs' (if such a group exists) should sponsor an e-learning collaborative, to:
- develop and share expertise in creating effective online learning experiences using courseware and other learning technologies
 - facilitate the creation of online learning objects and instructional Library web content that can be used broadly across disciplines or adapted for specific disciplines
 - develop strategies and offer advice to colleagues on how the Library can effectively integrate into the Queen's online learning environment (e.g. Moodle)

The e-learning collaborative should be led by an e-learning expert who will act as a resource and mentor within the collaborative and across the Library system and contribute to the development of Library-wide instructional web content. The collaborative would draw on the learning technologies expertise of individuals in ITS services and other University units as appropriate. **ISTG 15**

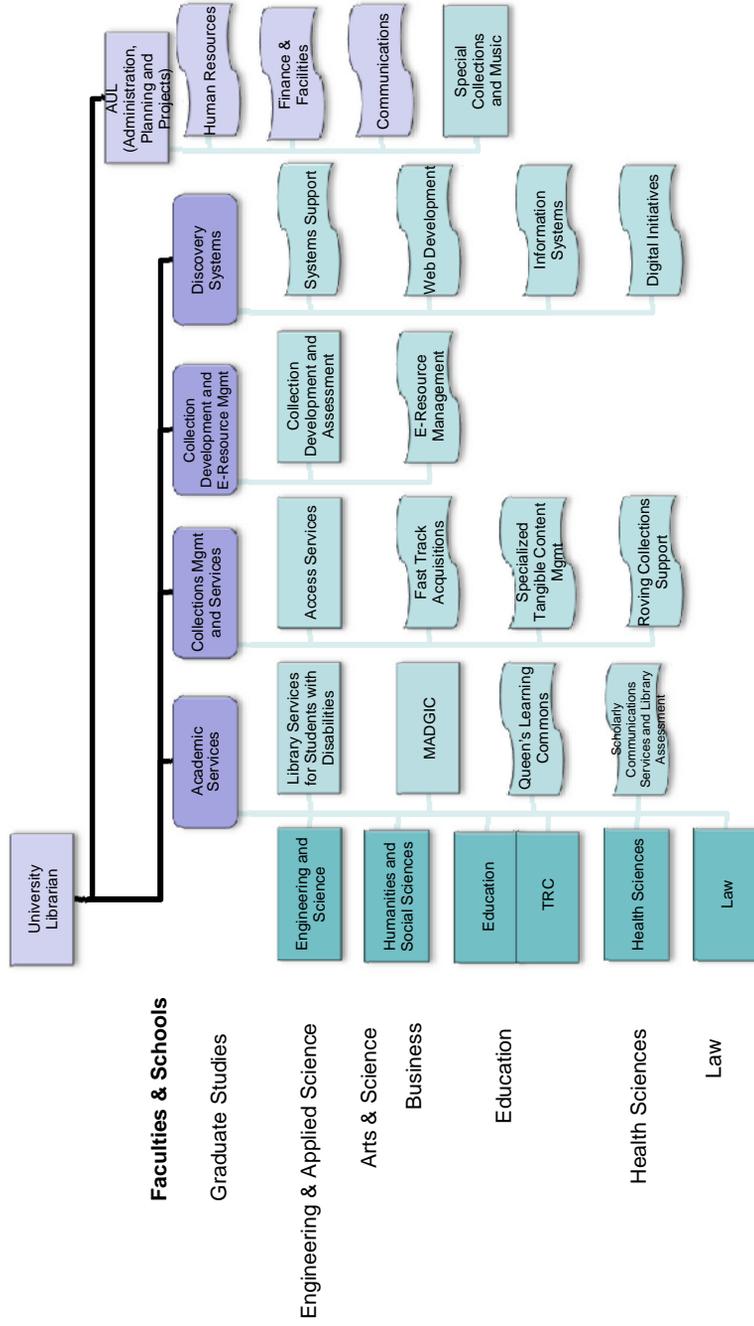
LIBRARY AS PLACE

- 57. Continue to place a high value on in-person interactions in our physical libraries (in addition to virtual interactions) and support units in exploring new models for staffing reference desks. **ISTG 11**
- 58. Continue to utilize casuals for evening and weekend hours. Over time, it may be appropriate to reduce the training for casuals to a very basic level, depending on the outcomes of self-check equipment testing and service model discussions arising from other aspects of the Library Change process. **OR 2.7**
- 59. Continue to achieve minor cost savings by reducing hours and/or staffing levels wherever possible, but also review service points in light of activity levels. The Library Change process needs to consider the more fundamental questions of the viability of our current number of physical locations and the nature of the services to be delivered. **OR 2.8**

COMMUNICATIONS (SUPPORTS ALL PRIORITIES)

- 60. The Library should affirm a clear vision in communicating the results of the change process to the University, and these statements should highlight our unique expertise and active engagement with the academic enterprise. **ISTG 1**

Appendix 3: Queen's University Library Organizational Structure 2010



Collaboratives and Working Groups
 The required groups and formats will be determined during the implementation process.

 Functions
 Existing units