



Learning Services



*Submission to the
University of Alberta Academic Plan 2007-2011 (Draft)*

"From Good to Great"

June 2006

Placing the Cornerstones...

Dare to Discover: a Vision for a Great University sets a vision for the University of Alberta: “*To inspire the human spirit through outstanding achievements in learning, discovery, and citizenship in a creative community, building one of the world’s great universities for the public good.*” Learning Services (LS) has taken this concept of a great university and built on it within the portfolio. We recognize that our contribution to the attainment of greatness must be founded on collectivity of the unique contributions by the units of the LS portfolio, particularly the University Library System, Museums and Collection Services, University Archives, University Press, and the Bookstore. The whole is truly far greater than the sum of the parts. We celebrate and recognize the individuality and attributes of each distinct unit but realize that the real value of our contribution to the University is attained through leveraging these strengths collectively to provide strong support for the teaching and learning, research and creative activity, community involvement and partnerships that distinguish our institution.

The ‘Cornerstones’ of the University of Alberta have been laid on bedrock. Much of the ‘foundation’ is in place. The University is profoundly proud of its legacy as a public university for “all the people”. It is distinguished worldwide for inspired teaching and innovative research; it is exalted for its learning outcomes; and, it is noted for its generosity of spirit both in sharing expertise, and in providing barrier-free access to its scholarly endeavor. The leitmotiv of its administration and faculty is the continuous evolution of teaching methods, and the creation, dissemination, accessibility and preservation of generated or acquired information and knowledge.

Part of that foundation is the role played, and the contribution made by the collectors and custodians: of the University’s documentary and artifactual memory of the human record; and of the extensive evidentiary exemplars of the biosphere. These agents are heralded, and they are empowered as ‘builders’ and stewards of the institution’s information and knowledge resources. They are charged consciously to stimulate learning, nurture the intellect, and to inform the curious. They are challenged constantly to imagine and execute innovative means for student and faculty interrogation and interaction with these research collections regardless of discipline, language, and panoply of media. Their responsibility extends to the creation of products and services in both physical and virtual space—with collections organized and delivered in such dynamic manner as to enable discovery and facilitate knowledge retrieval.

Learning Services is a vital part of the foundation upon which will be built the ‘Great University’. LS recognizes greatness in its own right when it is first acknowledged universally as an indispensable partner in enriching the learning experience for students, and then by acknowledgement that the University is an ‘address’ of choice for graduate students, faculty and research staff as they engage in the discovery, dissemination and application of knowledge through teaching and research.

By way of continuously driving to embody excellence and to be innovative in all that it undertakes, Learning Services will strengthen the foundation and in turn the ‘superstructure’ that is the University. Like the institution we serve, our collections, programs, products and services will in perpetuity range from the traditional to cutting edge. We will strive to provide seamless delivery of services and memory capabilities in the areas of information/knowledge creation, access and preservation.

Our mission is as the nexus of academic leadership, advocacy, and innovation for traditional and virtual exploitation of information/knowledge resources, products and related services as applied to the academic endeavor. Our core activities include: harmonizing and improving access to an increasingly exhaustive *in situ*, remote and virtual collection of resources; adapting, adopting or innovating the requisite technologies to create robust service environments; expanding our capacity to create new knowledge products; providing superlative stewardship to the memory collections entrusted to our care; improving the venues in which our services are delivered; demonstrating that efficiency and effectiveness are enabled in everything undertaken; and, extending the benefit of the University's information/knowledge resource base and related services and technologies to local, regional, national and international communities—for the benefit of “all the people”.



Planning for Great....A Process for Engagement

The preamble is the “blueprint” for our internal planning exercise. Every member of the portfolio is challenged to imagine “greatness” through the articulation of our potential and the exploration of the realm of possibilities for greatness in the portfolio. Part of the task has been to inspire, reinvigorate and create enthusiasm for not only the planning process, but for the opportunity unfolding. Part of the task continues as we maintain the enthusiasm, spirit for innovation, engagement and momentum to pursue the vision and build our support on the foundations set in the “cornerstones” of a great university.

Each unit of Learning Services was charged with creating an appropriate process within that unit to specifically gain input for the academic plan. In doing so they were challenged to be innovative in their ideas and realistic in their resource expectations. Learning Services will ultimately have a strategic plan that defines key directions over the next four years. Each unit is committed to participation in the creation of a LS strategic plan and the development of more comprehensive unit tactical or action plan over the next several months. Encompassed in these directions will be both broad and specific initiatives which respond directly to the academic themes established for the four year planning horizon. A snapshot of the high level or broad directions for each LS unit follows. As the planning process evolves and continues these broad directions will be validated, refined, enhanced, modified and developed more fully, in response to other academic plan submissions as required.

While the planning process continues, we have not stopped our innovation or curtailed our plans. We are continuing to build our support according to our “blueprint” and have already initiated some new activities. We continue to seize opportunity where opportunity presents itself.

... And true to our vision, and founded on our cornerstones, we have embraced the technology that is the way of life for so many of our students. We have begun to communicate our plan using a tool that enables all staff to participate collegially, to exchange ideas in an open forum on an ongoing basis, and that makes the opportunity available whenever and wherever the staff want. We have initiated a Vice-Provost and Chief Librarian's blog.

Building on a Solid Foundation...

University of Alberta Library System





*“No one ever graduated from the Library....but no one ever graduated without one”
(Samuel Huang – University of Arizona)*

Vision:

To be the greatest academic research library in North America

Outcome:

The University of Library System will be **recognized** internationally, nationally, and locally as one of the best academic, research libraries anywhere, for the breadth and depth of collections, the innovative and user centered services, the engaged and energized staff, the inspiring and purpose-focused venues and the relationships it builds with its partners and the community.

-  Recognized by our faculty and students
-  Recognized by faculty and students at other institutions
-  Recognized by peer and other academic institutions
-  Recognized by the Community

Pillars:

Library of Record

A traditional area of strength of the University of Alberta Library System is the rich and expansive print and electronic collections which support the research and teaching endeavours at the University. The richness of the collection is lauded by many graduate students and researchers, and compared favourably to collections worldwide. Our overall ranking of 25 in the Association of Research Libraries (ARL) is a testament to the strength of our collections.

These collections support not only research and teaching activities, but are the foundation for the creation of partnerships and outreach initiatives. These same rich collections, both print and digital, are the foundation for partnerships such as NEOS, which make our very desirable collections available to faculty, staff and students at post-secondary institutions, government departments, and libraries across Northern Alberta. Our rich collections combined with our exemplary service and innovative technologies account for our ranking as the second most active interlibrary lending service in North America. A great many of our resources are shared with Alberta residents.

However, a collection is never complete and our task to maintain and enhance collections continues. We continue to acquire print and license electronic material. In our pursuit of greatness we will be undertaking a review of our collections in key research areas to compare these collections to the best collections in North America. We will be targeting our investment to ensure that we have the most comprehensive collections, both print and digital, in the key areas.

As society becomes increasingly dependent on the electronic environment, the digitization of our collections becomes paramount to support research, teaching and to forge our connection to the community. Digitization projects specifically relating to the North (circumpolar library content), and of first nations content (library owned content – ie Javitch collection, and content held at NEOS First Nations institutions) will be priorities. This is in addition to the existing *Peel's Prairie Provinces* which has digitized all public domain printed documents relating to Western Canada. These targeted digitization projects foster our connection to these communities. The collectivity of all of our digitization projects extends our reach to rural Alberta and to national and international audiences. We are exploring an opportunity to become a national centre of excellence for our digitization initiatives.

Founded on our rich print holdings, the breadth of our electronic collection, and the quality of our digital projects will continue to be instrumental in establishing our reputation as a national and international leader, and place us at the forefront of initiatives such as the Lois Hole Campus Alberta Digital Library (LHCADL), and AlouetteCanada. We will continue to take lead roles in these initiatives.

Continuing the development on an institutional repository (IR) is fundamental to the aggregation, organization and preservation of research material generated at the institution. Coupled with a project to undertake retrospective digitization of theses and to maintain further theses electronically, the advancement of the IR will efficiently connect future generations of researchers to knowledge and data. Similarly, the Research Data Centre (RDC) will be maintained and enhanced. The creation of a new role/position to further the creation of the IR and to assist in the RDC, particularly relative to GIS data, is imminent.

A Library of Record implies more than just “collecting” resources but connecting users to the print and electronic collections, and preserving and safeguarding the assets for generations to come. We will ensure that all of our acquisitions are catalogued (print and non-print), and that the cataloging and catalog tools are enriched to facilitate “finding” not “searching”. With the upcoming expiration of the lease for the BARD facility, it is timely to plan for a new offsite storage and preservation facility to ensure the preservation and safeguarding of the research collections. Planning continues and the necessary funding is being sought.

Additional Competencies: Cataloging and programming for the enrichment of records, preservation expertise, project management for digital projects

Current Resources:

Through internal reallocations and fund development initiatives we will continue to manage our acquisitions, apart from inflationary pressures (noted below). We will continue to acquire collections, albeit sometimes more slowly than could have been achieved with additional resources, to supplement key research areas.

Digitization projects will continue to be funded internally, supplemented with funds from the LHCADL, from various provincial and federal grants as they are

available, through fund development initiatives, and through creative partnerships with community agencies and the private sector.

The upcoming expiration of the lease on BARD has triggered a planning process for a new off-site storage and preservation facility. The costs associated with the planning will continue to be funded internally, in part through our development efforts.

Supplemental cataloging funds have already been committed for the next 3 years and should be sufficient to address backlog and enrichment issues.

Additional positions were provided for the RDC and IR and this will be sufficient in the planning horizon.

Incremental Resources:

The Library will continue to request an annual increment to the information resources budget to offset the costs of inflation. The amount will vary based on our ability to cover these costs internally, first through increases in the value of the Canadian dollar relative to other key currencies, and through participation in programs such as LHCADL. Estimate \$500,000 new annually

The preliminary cost estimate of a facility to replace BARD is \$50 million

‘Capstone’ Resources:

Ideally, a preservation librarian would be dedicated to ongoing preservation issues relative to the print and digital collections, supplemented with adequate preservation equipment. The position and equipment would be relevant in the new BARD. Estimated cost: 260,000.

A digital projects production coordinator with strong project management skills would streamline the process of digitizing material and make our internal processes more cost effective and efficient. We continue to digitize materials using existing skill sets and resources, but this position would add value across the portfolio. Estimated cost \$60,000.

 ***Library as Place***

Academic libraries have universally been a focal point on ‘great’ campuses. The prominence of the library on campus is no longer rooted in its iconic value, but prevails as a ‘home’ to generations of students. This ‘home’ is now representative not only in a physical space, but in virtual space. An enduring value of librarianship is the concept of library as place. A significant body of research suggests that libraries are recognized and valued because they provide a welcoming, safe and secure learning environment, which is non-threatening and non-judgmental. Libraries provide the physical space for social interaction and group learning as well as quiet, personal study and research space. They must be comfortable and flexible to permit sustained use and multiple functions. They must provide the social computing and electronic environment to enhance anytime,

anywhere learning and research. For many students, the library has been the greatest contributor to a positive undergraduate experience.

The Library System is continuing to expand and extend are virtual presence by increasing the breadth and quality of electronic services we provide. These services are all part of our innovative service environment. We have been a leader in the provision and early adoption of virtual reference services. With our partners we will continue to provide reference services for our faculty, staff and students, virtually, anywhere and anytime. We will continue to offer a full array of online services relative to our print and electronic collections. Our digitization initiatives are fundamental to the notion of a “virtual” library. We have begun and will actively continue to provide tools and an environment to facilitate virtual social spaces and social computing to complement research and learning activities.

On the lower level of the Cameron Library we have created the Knowledge Common which is used extensively by students. While no longer considered innovative, the knowledge common space has become an essential component to any academic library. We will continue to enhance staff resources for this facility and ensure that furnishing and equipment are maintained in good working order. As funds have permitted we have enhanced the common by renovating portions of the available lower level space to provide group study space, fully equipped group study and presentation rooms as well as individual computing stations. Limited work has been done on the second floor of Cameron as well. Yet, there is so much more demanded by our students and so much more to be done in the Cameron facility alone. Part of our ideal configuration would include a coffee bar. This component seems to be integral to student life, and has been very successfully incorporated in many of ARL member libraries. Ideally, enhanced knowledge common facilities would be present in other libraries across campus, but in the immediate term the Cameron Library is our priority.

We know undergraduates are seeking esthetically pleasing, comfortable and adaptable spaces. Undergraduates are heavy users of library space, not only at our institution but at campuses across North America. In spite of our efforts to create a Knowledge Common in the Cameron Library, the balance of our physical space therein requires significant renovations to meet the needs of today’s learners. The space is not at all esthetically pleasing, nor is it flexible or adaptable to the various and diverse study and research needs of users. The configuration and type of space is out of date and is no longer correlated to the research and study needs of the campus community. Slowly, we are renovating small pieces of the facility as we have available funds. This tactic is neither efficient nor does it permit the large scale changes that would reap the biggest benefits, but it is affordable within the context of existing resources. Our goal however, is to move forward with a major enabling renovation.

Current Resources:

Current resources are sufficient to maintain the status quo. We will investigate the potential for creative financing and alternative funding sources in the absence of any one time institutional funding to undertake renovations of the Cameron Library facility. While less than ideal, the Library may have to proceed with some work on the first floor of Cameron as an essential priority by managing position vacancies.

Incremental Resources:

The renovation of the Cameron Library would make a significant improvement in the undergraduate study and research space on campus and contribute notably to the undergraduate experience. The one-time cost is estimated at \$6.5 million but a priority would be to secure funds to complete the first floor renovations estimated at \$2 million depending on asbestos abatement issues.

‘Capstone’ Resources:

One time funding would be required to create Knowledge Common like space in other campus libraries such as Rutherford, Education and FSJ facilities. This would include renovations, equipment and furnishings. Costs to be determined

Empowered Staff

As a cornerstone of a great university, our empowered staff are one of our greatest attributes. In years past, in response to budgetary pressures, a relatively robust staffing complement was reduced drastically over time. We flattened our organization. A seminal piece of research entitled *8 R's, the Future of Human Resources in Canadian Libraries* (2004) suggests that in all Canadian libraries, there are gaps in leadership and management competencies, few individuals of a certain age demographic, and few mid-management career opportunities. Younger librarians have little opportunity to acquire these competencies within our existing organization. It is essential we provide more opportunity for our staff.

To achieve the aspirations outlined throughout this plan, there will be significant organizational changes aligned with the directions in which we are heading. These organizational changes will not only respond to changing priorities but will create opportunity and new challenges for our staff. These changes will demand the reconfiguration of some positions and the establishment of new positions, at all levels. Many of these changes have recently been initiated. Some of these changes will be facilitated as we find technology enabled service efficiencies.

We must generate excitement and enthusiasm and foster a spirit of innovation if we are to provide the services our users demand. To create such an environment, we must become a more nimble and responsive organization which rewards and encourages innovation and creativity. While changes to the organizational structure will support a responsive, nimble organization we must provide further incentives for innovation.

We will use existing resources to create an innovation fund. Professional staff will have the ability to access financial resources for innovative ideas and service improvements.

It is important that we continue to provide training and developmental opportunities for all staff. We will continue to encourage participation in professional organizations and other contributions to the profession and libraries. It is important that we foster and encourage staff participation at conferences and meetings of professional organizations. We will continue, and if opportunity permits, expand such participation, to encourage quality

scholarly research and the exposure of that research by our librarians by way of publishing and academic presentations. These activities will continue to contribute to our reputation.

Current Resources:

Most of the organizational reconfiguration will be funded internally, using recent vacancies, and efficiencies. The innovation fund will be funded internally and from development initiatives.

Incremental Resources:

Overall eight new unfunded professional positions have been identified throughout the document as part of the incremental or perfect world scenarios.

 ***Innovative Services***

The Library community has long been preoccupied with understanding the user community and their information seeking behaviours. This traditional fascination has turned into a necessary preoccupation as we try to understand how Gen Xers (born 1960s – 1980s) and Millennials (born between 1980 – 2000) learn, seek and use information and interact with libraries and other information providers. It is essential to understand these constituents if we are to provide the services they expect and make a positive contribution to their learning and research activity. In fact we are keen to understand all users in an environment now predominated by “electronic access to everything.” Recent research, such as that undertaken by OCLC and documented in *Perceptions of Libraries and Information Resources* and *College Students: Perceptions of Libraries and Information Resources* will inform our choices and service offerings.

Most importantly, we understand the differences in information seeking behaviour, information needs, and the relationship to the library and library services between the undergraduate and graduate or research communities. Similarly, there are differences across disciplines as to how the library and its services are used. We recognize an ongoing need to differentiate and stratify services for these communities and to match the service style and level to needs. Meeting the user in the user’s flow implies that we will endeavour to provide service to users when they want it, if they want it, in the format and style that they prefer. One significant implication is that we will need to make significant changes to our web interface or public interface in our integrated library system or enable resource discovery and contextualized key word searching. This will improve our ability to connect our various users efficiently to all of our diverse and rich collections. This requires programming and software acquisition.

To align ourselves more closely with the academic themes and to address the differentiated service requirements in the undergraduate and graduate constituencies we will restructure our current senior management responsibilities so that we have a senior librarian responsible for Undergraduate Services and another senior librarian responsible for Research Services. We are investigating a structure that places embedded librarians within key research areas and which has an increase in subject specific librarians.

The Library will take a more active role in connecting undergraduates with information and full-text resource material by working with faculty and AICT to incorporate and

embed these resources or links thereto in courseware. Specially developed and subject specific course “rooms” will enhance the undergraduates foray into research projects as these requirements are incorporated in their programs.

The Technology Training Centre (TTC) contributes to the success of students by providing tools, training, enquiry support that appropriately contribute to students’ acquisition of knowledge, skills, and competencies in the area of technology. The TTC will continue to ensure that access to information and to technology is supported by training that meets established standards for information and technology literacy. The TTC can be further developed and promoted as a center for excellence in information and technology literacy and be an integral part of the ‘undergraduate’ programming.

While it is important to enhance the undergraduate and graduate experiences through specialized services, it is equally important that we deliver appropriate and responsive services as part of our aboriginal engagement strategy. To address the unique needs of the aboriginal community, both on campus and beyond, the library will add an aboriginal services librarian to engage and support the First Nations community on and off campus. It is important that we find ways to provide service and collections to our aboriginal constituents that respect their world view and traditional learning methodologies in addition to our more typical environment and learning pedagogies. We will ensure that First Nations students have adequate information literacy support to succeed in meeting the learning and research requirements.

Additional Competencies:

Understanding of the aboriginal world view – Aboriginal services librarian, reference/subject specialist librarians – virtual reference and graduate support, information literacy specialist - undergraduate support, advanced library technology skills - online services librarian

Current Resources:

Through reorganization and restructuring most of the changes to service can be accommodated within the existing budget framework. We will endeavour to deliver to all of our priorities with existing resources, but we will not be able to act quickly on certain subject specific needs or certain project requiring specific technology competencies. .

Incremental Resources:

Require ongoing resources to support the Aboriginal Services Librarian, \$80,000. We have short term funding from a private donor for this position.

‘Capstone Resources’

5 new librarian positions with skill sets noted above

Synergies – ‘Partners R Us’

The Library has an established tradition of serving Albertans and connecting with the community. As early as 1908, the Library provided service to Albertans through the Extension Library, which functioned as a public library service to rural Alberta. While that service was terminated in 1986 when the last regional library system was established and the seven systems assumed responsibility for this service, the University Library System has continued to make its collections available to Albertans through a robust interlibrary loan program, through initiatives such as NEOS and The Alberta Library (TAL). We are connected to rural Alberta, perhaps more than any other University unit, and will continue to offer these services.

Through various innovative and transformational partnerships such as the Health Knowledge Network (HKN), Council of Prairie and Pacific University Libraries (COPPUL), Canadian Research Knowledge Network (CRKN) etc. and now the Lois Hole Campus Alberta Digital Library (LHCADL) the Library has levered our ability to provide resources to our faculty, staff and students.

We continue to partner with Edmonton Public Library (EPL) on our integrated library system. This partnership continues to provide cost savings in the administration of the system. We will be exploring the possibility of further increasing service to students by incorporating an EPL branch within our existing operations. Since 35% of undergraduates have a public library card or access to a family card, this may represent a notable service enhancement without cost. We are also exploring the potential cost and benefit of providing students with an Edmonton Public Library card through an arrangement with EPL, and looking at the establishment of an off-campus U of A/EPL branch underwritten by a private sector developer.

We have identified an opportunity to work with the First Nations Colleges to improve the quality of library service in these institutions across the province. Making more resources accessible at these colleges makes the transition to the University environment less threatening and easier for these students. In cooperation with TAL and with contributions from the government, and a corporate sponsor, the University Library System through the ‘NEOS First Nations Library Initiative’ is taking the lead in improving library service and providing outreach to the aboriginal communities across Alberta.

Current Resources:

All initiatives are either have no cost implications or will be covered through existing resources, or outside agencies/sponsors unless specified elsewhere.

Museum and Collections Services

“Where wonder meets wisdom”

Outcome:

Museums and Collections Services will be locally and nationally recognized as holding one of the best academic and research collections of art, artifacts, and specimens, and recognized for innovative curatorial practices, for technology enriched access services, for inspiring and purpose focused facilities and for the relationships it builds with its partners and the community.

Pillars:** Collections & Services**

The Department of Museums and Collections Services is the central source of information, services and programs related to the University of Alberta Museums. We provide professional museum expertise to the faculty and staff who maintain the University's museums and collections and to the museum community in general.

As part of our mandate, we provide advisory services and training in exhibitions, public programs, collections management, and conservation issues. We will continue to encourage and enable interactions and communication among curators, academic staff, collections staff, students and researchers through a distributed committee structure, through workshops and through the maintenance of a basic website. Ideally, we would redevelop the website into a more dynamic resource and implement an improved communication strategy in diverse media.

We will strive to improve access to collections in the delivery of a dynamic, discovery-based learning environment for undergraduate and graduate students at the disciplinary and multidisciplinary level. This will include the development and implementation of an access plan for all collections, including both physical and internet access. Internet access implies the ongoing digitization of our collections. We will facilitate increased profile and access to collections information and scholarship for the benefit of the public good by providing dynamic physical and virtual exhibitions, programs, events and communication strategies for most collections based research. We will ideally implement programs to test and develop exhibition, interpretive and education techniques and strategies. However, with the current resources, and commitments to the planning of the curatorial centre, only basic access can be guaranteed. Basic and limited physical and virtual exhibitions, events and communications strategies for some collection based research will be supported.

We develop policies and procedures to assist the University's museums and collections, and are a liaison between the collections on campus and the broader community.

Current Resources:

MACS can accomplish the limited or basic initiatives within the existing budget and grants system, supplemented by limited contributions from the Friends of the University of Alberta Museums. Staff positions are currently being realigned in the short term to accommodate the accelerated planning for the centre.

Incremental Resources:

To implement initiatives relating to access – virtual and physical and to provide enhanced support for research and teaching through exhibitions etc. requires additional staff resources. Permanent staff resources are required at a cost of \$250,000. Temporary staff resources are required at a cost of \$300,000 and additional operational funding of \$50,000 is required.

Curatorial Centre

Museums and Collections Services (MACS) strives to facilitate access to museum collections in support of multidisciplinary and interdisciplinary scholarship and discoveries by developing and providing basic physical access venues and basic intellectual and virtual access opportunities for all of the collections used in research and teaching. MACS is responsible for the stewardship of collections. We must ensure institutional policy and compliance with provincial, federal and international legislation relating to the acquisition, and stewardship of significant collections is acceptable.

At the present time, with existing resources, structures and facilities, MACS is only able to support the basic maintenance of collections. We have critical access and storage needs and are challenged to meet compliance standards. Indeed, a recent audit by the Cultural Properties and Export Review Board has put our status in question as a ‘Category A’ institution. Loss of this status would curtail our collecting activity and significant impact the institution’s reputation. Because of these challenges we will for the present implement a new acquisitions mandate template and process to limit acquisitions of new objects and specimens to those of significant strategic value to the institution.

As the new centre is established, we will be able to support dynamic inter/multidisciplinary physical access/conservatorium and ‘eureka’ zones that stimulate creativity and discovery, and ensure preservation. There will be intellectual and virtual access opportunities and programs for all collections used in teaching and research. The new facility will address issues relative to compliance with policy and legislation. In addition, high standards of museum service and best practice to achieve and maintain stewardship of resources will be ensured in complying with legislation in adhering to University of Alberta Museum Policy.

The curatorial centre will provide opportunity for Museums and Collections Services to contribute to the creation of an exceptional and life-changing university experience for students by developing and providing a credit based student internship program for all collections. The centre will enable the development of credit course and programs of study as well as extension programming that address emerging and innovative museum related opportunities. Additional student engagement will occur through student employment or volunteer opportunities.. .

Until the new centre is established it is feasible to offer only limited public programming. Thereafter the centre will be a focal point and provide a connection to the community through enhanced access to programs and collections.

Current Resources:

MACS can accomplish the limited pre-curatorial and research centre initiatives within the existing budget and grants system, supplemented by limited contributions from the Friends of the University of Alberta Museums. Staff positions are currently being realigned in the short term to accommodate the accelerated planning for the centre.

‘Capstone’ Resources

The cost of the new curatorial centre will be determined when the business plan has been completed. The business plan will also provide the parameters for an operational and resource plan for the operation of the centre which will encompass all staff requirements and program requirements for the new operation.

Talented Staff

Museums and Collections Services strives to inspire staff to contribute to the development of civil society and our democratic institution by developing, providing and supporting a MACS value system. Staff are encouraged to participate in national, and international museum related organizations, boards, committees and conferences. Further enrichment and support could be provided to staff with the development of a Museums Staff Bursary Program and a Museums Staff Leadership Institute. These would be important initiatives in the longer term.

The programs and services offered by Museums and Collections Services would not be possible without the dedication and commitment to excellence made by staff, volunteers and students. This contribution to the overall operation and environment at MACS is significant and acknowledged through MACS recognition program. As programs grow and evolve, it will be important to implement a training plan for all U of A Museum staff, volunteers and students so that they can continue to provide the exemplary service to the organization and find their involvement rewarding and encouraging. These programs will ensure the development of the U of A Museums community within a culture of excellence.

Synergies

Museums and Collections has had a rich history of community involvement and engagement. Through the Friends of the U of A Museums group they have facilitated pride and ownership of the collections. The development of an engaging and sustainable community volunteer plan and the advent of the new Curatorial Centre will further the involvement and contribute to the rejuvenation of this group

MACS will continue to facilitate and build strong partnerships with the capital region, the City, the Province and rural communities. Key strategic partnerships with the Alberta Museums Association to deliver programs, resources and training will be developed. Through a strategic partnership with Alberta Community Development in the future, creative access solutions to the University’s and Province’s collection and associated research will be facilitated. MACS has an established reputation for excellence in

outreach activities as evidenced by the Muse program which it delivered in partnership with Alberta Education and province-wide school boards and associated museums. While this program will continue, it is limited by insufficient funding. The program could grow significantly. Similarly, additional access to local and rural Alberta communities to the collections, associated research and study opportunities could be provided through partnerships and innovative funding opportunities. There is also potential to increase the level and number of partnerships with national, international online research networks to profile and provide broader access to the U of A collections information.

Many of these opportunities are limited by funding. The implementation of a fundraising strategy to secure additional resources will be key to the implementation and success of these potential programs.

Current Resources:

Basic support for the Friends group will continue from existing resources. The Friends group continues to provide financial support. To date additional donor support has been limited.

Incremental Resources:

The advent of a Curatorial Centre is likely to enhance fund development opportunities for all programs and services. A comprehensive and updated plan for fund development will be required.

‘Capstone’ Resources

\$500,000 is required to support a robust Muse initiative to bring museums and collections to schools across the province.



University Archives

Vision:

To be the preeminent depository for the institution’s documentary memory

Outcome:

The University Archives will have acquired the corpus of extant University records.

Pillars:

Institutional Memory Depository

As the official repository for the permanently valuable records of the University of Alberta and its affiliated institutions, our holdings consist of material that is of continuing administrative, legal, or historical value. In addition to administrative and academic records, the Archives also collects University publications and the private papers of faculty, staff, students, alumni, and various university-related organizations. The Archives also contains the records of many notable individuals and organizations relating to Alberta and federal politics, the oil sands, theater,

education, and western settlement. We preserve over 4,400 linear metres of records. This includes textual records, photographs, audio and video recordings, film, microforms, architectural drawings, and maps.

To act on our mandate to acquire the documentary memory records of the institution, we must more actively ensure that we are receiving these records from all academic and other units. The development and confirmation of a long-range acquisitions strategy for archival records that supports the overall academic plan is a priority.

The duty to preserve these records can only be fulfilled if facilities are sufficient and designed to support storage and retrieval functions. As the lease for the BARD will be expiring, and the planning for a new facility has commenced, Archives will provide input to the planning process which will culminate in a new repository. A transition to a new more robust repository will be accompanied with an operating plan to sustain the new facility, including a need for additional staff. Archives works with a lower staff complement than do other comparable facilities.

Additional Competencies:

Archival competencies – Additional archivist

Current Resources:

Current resources are sufficient to maintain the status quo and to plan for the new facility.

Incremental Resources:

The cost of the BARD replacement has already been identified in the Library section.

To appropriately plan and implement a more comprehensive acquisitions strategy additional staff resources are required. 1 Staff \$60,000

‘Capstone’ Resources:

To utilize the new facility to its true potential and to expand and implement acquisition and preservation programs would require an additional \$125,000

 ***Talented Staff***

We want to ensure the development of the University archival records management community within a culture of excellence and by developing a training plan for staff and volunteers. We will continue to encourage staff to aspire to excellence and to participate actively in national and international archives and records management related organizations, boards, committees and conferences.

 ***Innovative Services***

Over the next four years the Archives will continue to respond to research demands and records access, including those related to the University Centenary as a priority activity. The Archives will also make a priority the accommodation of strategic acquisitions.

To facilitate access to archival collections and University records for scholarship and research ideally we would provide dynamic physical access venues and dynamic intellectual and virtual access opportunities. This presumes, as a first step, the development of a long range digitization strategy for all records. Because the Lois Hole Campus Alberta Digital Library (LHCADL) may provide funding for priority digitization projects, we may digitize content in support of the aboriginal strategy. Digitization of material requires significant financial commitment. Thus, we will determine the potential for finding alternative sources of long-term funding for these initiatives.

While the Archives will continue to develop and maintain existing archival and records management policies, procedures and guidelines, it is timely that we initiate the development of a campus-wide records/information management strategy in conjunction with the Information and Privacy Office to better support the academic mission and to comply with provincial legislation.

Additional Competencies:

Digitization and archival competencies – Additional digital archivist

Current Resources:

Current resources are sufficient to maintain the status quo and to plan for digital initiatives. Through the Lois Hole Campus Alberta Digital Library it is possible that some funding might be available to undertake some priority digitization projects, particularly as they relate to the aboriginal strategy. However, a digital projects manager/archivist would still be required – see incremental below to support any digitization activity..

Incremental Resources:

To appropriately respond to the Centenary needs \$80,000 and to implement digital and records management projects \$60,000

‘Capstone’ Resources:

To develop a robust digitization program, without external funding would require an additional \$300,000

 **Synergies**

Working with the Library, and the Alberta Historical Resources Foundation, the Archives will be instrumental in developing one of the preeminent projects in celebration of the University of Alberta centennial, the Centennial Website. The website will chronicle the rich history of the University and its contribution to the province. This project will be a significant undertaking with significant one time cost associated therein.

The Archives will continue to work with the Archives Society of Alberta and other related organizations.

Current Resources:

The Centennial website with an estimated total cost of \$300,000 over three years, will be funded through current operations, and contributions from the Library and Learning Services, and through funds generated from development activities.

University of Alberta Press

“University presses do things that wouldn’t otherwise get done. They perform services that are of inestimable value to the scholarly establishment – researchers, teachers, librarians, and the rest of the university community – but also to the broader world of readers, and ultimately to society itself.” (American Association of University Presses)

Vision:

To be one of the top two academic presses in Canada

Outcome:

The University Press will be recognized internationally, nationally and locally as a publisher of works of recognized scholarship, authored by outstanding scholars.

Pillars:

Publishing

The University of Alberta Press (UAP) extends the reach and influence of the University of Alberta by disseminating scholarly research, knowledge and ideas through the publishing program. UAP books make available to the broader public the full range and value of research generated by University faculty, and other notable researchers. About 45 percent of all Press titles are authored by University of Alberta faculty.

The UAP publishing strategy continues to be to publish excellent, award-winning books in our main areas of expertise and interest. We publish books of local interest, those that capture the history, literature and culture of our region, and those that explore important scholarly, cultural, literary, historical and political aspects of Canada. We have also gained a reputation for publishing reference works such as *The Canadian Dictionary of ASL*, and *Weeds of Canada and the Northern United States*, both best sellers. We have recently introduced two new series: the University of Alberta Centennial Series and Mountain Cairns – a series on the history and culture of the Canadian Rocky Mountains. We anticipate the series will continue to attract some very fine manuscripts. UAP will continue to actively seek manuscripts in our areas of strength and expertise. The UAP ideally would like to pursue more manuscripts, as to double publications from the 25- 30 per year to 50 – 60 per year. While we believe our reputation would attract good quality manuscripts, we require additional editorial staff to manage the additional output.

The UAP has recently pursued and will continue to venture in electronic publication both of the backlist titles, as well as future and special publications such as the *Atlas of Alberta Railways*. We are actively working with aggregators and e-book publishers such as

NetLibrary, etc. to make our titles available to academic communities around the world, electronically. This venture has the capacity to significantly extend our reach and our reputation.

Additional Competencies:

Editorial skill, data management expertise, marketing skills

Current Resources:

The Press can continue at the current level of activity without any additional resources.

Incremental Resources:

To increase the number of titles published, the Press requires an additional editorial position at approximately \$75,000.

‘Capstone’ Resources

To move toward the vision the Press would require two more positions for marketing and data management at approximately \$120,000.

⌚ *Talented Staff*

UAP staff continue to contribute to the reputation and sustainability of the operation. Press staff continue to be leaders in their fields of expertise. The Press has won numerous awards for the publications such as for book design etc. The staff are not only committed to excellence in all aspects of publishing but in providing advice and assistance in scholarly communication and the publishing process to faculty, and to students interested in pursuing a career in publishing. The UAP is committed to providing an inspiring environment for people to work, to create and to aspire to excellence in publishing.

⌚ *Partnerships and Connections*

The University of Alberta Press actively seeks co-publishing opportunities, locally, nationally and internationally. When we have an international title such as *Building Sustainable Peace*, we are able to attract a foreign co-publisher, in that case the United Nations University Press. Co-publishing agreements not only enhance the reputation both of the Press, and the University but are accompanied by significant financial support.

The Press derives a significant portion of the operational budget for publishing, from an array of grants. These grants are based on the specific titles to be published and on the success and quality of the publishing endeavour. The Press will continue to seek out grant funding for as many of the publications as possible.

University Bookstore

Vision:

To be the best University/College Bookstore in North America

Pillars:

Innovative Products and Services

While the Bookstore is considered an ancillary operation, the products and services we provide are essential components to the success of the student learning experience. In recognition of the importance of our role in the delivery of course materials, the mandate continues to validate a strong service ethic and the provision of course materials on a cost recovery basis. Our pricing and service impacts the overall undergraduate experience.

The Bookstore continues to seek out the lowest cost alternative products for students by working with faculty and supporting the production and distribution of course packs, by initiating buyback and resale programs, and by advocating and implementing prior edition programs. The Bookstore has as a priority the investigation of potential alternative delivery options such as electronic textbooks. We will continue to work with the publishing industry to find and offer affordable electronic delivery solutions, which meet the needs of students. In spite of the prevalence of the electronic world, there is much to do to find a sustainable model for e-textbook delivery.

Apart from providing the requisite course material, the Bookstore must provide the service demanded by students. Buying textbooks should not be a distraction of a student's valuable time or energy. Instead, service should be quick and efficient and available at the times students prefer. Materials must be in the hands of students when and where they need them and want them. The Bookstore will continue to improve both traditional services, by minimizing waiting time, facilitating electronic ordering, and finding innovative ways to put the materials in the hands of students as well as investigating innovative future services.

The Bookstore works with the Students Union, by way of the Bookstore Advisory Group, which advises on acceptable service levels and pricing policies. At the same time, it works with Faculty not only to facilitate the order process, but more importantly to share valuable information relating to the publishing industry, editions, pricing and ultimately the potential cost impacts to students. The Bookstore will continue to provide this service to ensure timely delivery of course materials, at the lowest possible cost to students.

Dedicated Staff

Without an energized and caring workforce the Bookstore could not provide the service demanded by students and faculty, especially at peak times. Recognition and training support will continue to be important priorities for the Bookstore to maintain and enhance the current levels of service.

Synergies

The Bookstore works closely with both the Students Union and other areas of the LS portfolio to ensure that students have access to all of the course materials they require. We will be taking the lead, and in consort with other academic institutions and their academic libraries, be challenging Canadian publishers to see the opportunity in innovative electronic delivery mechanisms. Our goal is always to work with all stakeholders to provide the best quality course materials at the least cost to students.

The Bookstore continues to support various faculties and students through sponsorships of various functions and events.



...Getting to Great...

Key initiatives have been outlined in each area of Learning Services. However, often the collectivity of these initiatives is transformative and best advances our aspiration of greatness. We have identified the following transformative initiatives in the context of the academic themes.

Enrich the Undergraduate Student Experience

Enriching the environment that supports the undergraduate in their learning, creating and research endeavours can have a significant impact on how undergraduates perceive their university experience and the value they received there from. LS entities, in combination and collaboration can significantly contribute to the academic success and the overall undergraduate experience.

Undergraduates spend a great deal of their time at the physical library whether it be for quiet study, research, group study and assignments, personal computing, technology assistance or social interaction. The Library is one place on campus where students regularly gravitate. It is almost ironic that a generation that thrives in an electronic environment and generally prefers self-service and electronic or virtual interaction, continues, as generations before, to find the library a “home” on campus.

Thus, the quality, comfort, flexibility and appropriateness of the physical environment matters. We must undertake renovations to the Cameron library to transform it from uninviting, uninspiring, dated space to a vibrant, stimulating current space. We must expand the Knowledge Common concept to provide a non- threatening, comfortable, and adaptable space for study, group interaction, social interaction and research. This must become a priority.

Given the relevance of both virtual and physical space to this constituency, we must improve our physical space and continue to expand our virtual environment and the array and style of service we provide. User-centered service defines how we will respond to the undergraduates need for information, support and interaction. Undergraduates want service whether it be from the Bookstore, the Library or Museums and Collections, “Anywhere, anytime, how they want it when they want it, but only when they want, and only how they want it.” In part, the virtual environment complements this service dictum.

We will take advantage of their computer literacy and preference for virtual interaction. Both the Library and Bookstore survey, study, understand, and hear the undergraduates. We must make discovery and research easier and more intuitive, and the relevant information more accessible and connected to these users. They are the Google generation. We understand that we must invest resources to improving our library catalog, so that it facilitates finding, not searching.. We must adopt best practices and features from the social computing environment that is part of their lives, and incorporate these in our suite of services. We will continue to expand and enhance virtual reference and physical reference capabilities, but with a new, non-threatening and more flexible approach. The Bookstore will continue to explore and advocate for cost-effective course materials and services that complement the virtual environment.

In response to undergraduate desire for efficiency, value and time maximization the Bookstore and Library will continue to streamline service in physical locations, and take advantage of self-service technologies as appropriate. We will continue in our effort to place relevant information and course materials literally at their fingertips. While this can mean service offerings such as reserve and delivery of library materials, or online ordering and delivery of course information it may be most relevant as it relates to course management software and the relationship to library information resources.

Working with faculty members, we will push library material to course management software and ensure information is available. We will be exploring licensing provisions and copyright arrangements that would allow us to make full text information more directly available. We will create and populate subject “rooms” that provide comprehensive access to a rich array of relevant topical resources to support study and research. Collectively this array of service offerings will reach out to undergraduates to make their learning support and research environment friendly and more productive. However, we also recognize that there needs to be balance between efficient service and discovery. Our services must continue to instill the importance of discovery, experiential learning and creativity that differentiate an undergraduate experience at a research institution, the University of Alberta from any other undergraduate experience. We will be reorganizing to ensure that we have senior responsibility within the library for ensuring that we deliver a “great” undergraduate experience.

Through credit internships and programs, coincidental with the development of the new Curatorial Centre, Museums and Collections will contribute to the richness of the learning experience and create new opportunities for experiential learning. This Centre will provide a venue and a mechanism to incorporate research components in the undergraduate experience.

Enrich the Graduate Student Experience

The breadth and depth of our collections held in the Library, Archives and with Museums provide a foundation for research and discovery. We will continue to acquire collections, with an emphasis on those collections that support key areas of research and which supplement existing collections to make key subject area strengths the greatest available. WE will preserve these materials for the benefit of generations to come.

It is most important that we connect the graduate student audience to these rich collections in ways that support discovery and in ways that meet their parameters for service delivery. We will

continue to recognize the unique needs of this constituent and distinguish our services appropriately. We will strive to improve access to all collections in the delivery of a dynamic, discovery-based learning environment for graduate students at the disciplinary and multidisciplinary level. Included in this strategy is the concept of embedding librarians in key research areas and identifying more subject specific librarians to support research and discovery. This will also include the development and implementation of an access plan for all collections, including both physical and virtual access.

We will continue our efforts to digitize collections in the Library, Archives, and Museums and make available electronically publications of the University Press. While currently undertaken in individual units we are exploring the efficiency of aggregating these projects and managing them collaboratively. This will provide an opportunity to respond more comprehensively in providing virtual collection depth for disciplinary and virtual collection breadth for interdisciplinary research.

The ongoing development and implementation of an institutional repository which will provide comprehensive and coordinated access to institutional research will simplify and enrich the research requirements. Coupled with an initiative to retrospectively digitize theses and to make available in digital format all future theses, the institutional repository will be a powerful and essential tool for a great research university and for a satisfying graduate experience. Ongoing support and expansion of the research data centre, and its services further complements collections and services to support the graduate student and research environment. A re-organization within the Library will create a senior position of Research Services Librarian, whose responsibilities will be to ensure that we meet the needs of the graduate students and research community.

Integration of Teaching, Research, Scholarship and Creative Activities

As the new Curatorial Centre is established, we will be able to support dynamic inter/multidisciplinary physical access/conservatorium and 'eureka' zones that stimulate creativity and discovery, and ensure preservation. There will be intellectual and virtual access opportunities and programs for all collections used in teaching and research. We will encourage and enable interactions and communication among curators, academic staff, collections staff, students and researchers through access to physical and virtual collections and programs to support these interactions.

Working with faculty we will create more comprehensive linkages in course ware to library resources, which will enhance teaching and stimulate research and discovery. We will continue to assist faculty with rights management issues and finding appropriate print and electronic resources for incorporation in programs and related courseware. To complement courses and programs, the Library will continue to create "rooms" which collect content and connect users with research resources. The "rooms" would not be limited to print resources but would ultimately incorporate access to virtual collections from museums, archives and other collections available virtually.

The Library is continuing an internship program which provides opportunity for recent graduates from MLIS programs to gain valuable experience in an academic setting. The Library offers ongoing employment opportunities for Library School students. Similarly, the Press provides

opportunity for students interested in publishing. Once the Curatorial Centre comes to fruition, MACS will incorporate credit internships, courses and related programming to facilitate experiential learning in the context of the research collections.

Foster Interdisciplinary Collaboration

The Curatorial Centre will exemplify interdisciplinary collaboration and facilitate the sharing of collections and research thereon. Enhanced physical and virtual access to collections and appropriate venues which support access and collaborative programs will support multidisciplinary and interdisciplinary scholarship.

The ongoing development of the institutional repository and continued enrichment of the Research Data Centre will connect researchers from across disciplines to the scholarship and research efforts undertaken at the University.

Northern Engagement

Both Museums and Collections and the Library System hold rich collections relating to the North. The Circumpolar Library itself is an important research and teaching resource. As part of our digitization strategy we will be prioritizing the digitization of these collections to make them available and accessible as we pursue our relationship with northern communities. .

Aboriginal Engagement

The Library System has seen an opportunity to share our resources and work with the aboriginal communities to develop more robust library systems and services at the First Nations Colleges across Alberta. Having more resources accessible at these colleges makes the transition to the University environment less threatening and easier for these students. In cooperation with TAL and with contributions from the government, and a corporate sponsor, the University Library System through the 'NEOS First Nations Library Initiative' is taking the lead in enhancing library service and providing outreach to the aboriginal communities across Alberta.

It is equally important that we deliver appropriate and responsive services on campus as part of our aboriginal engagement strategy. To address the unique needs of the aboriginal community, both on campus and beyond, the library will add an aboriginal services librarian to engage and support the First Nations community on and off campus. It is important that we find ways to provide service and collections to our aboriginal constituents that respect their world view and traditional learning methodologies in addition to our more typical environment and learning pedagogies. We will ensure that First Nations students have adequate information literacy support to succeed in meeting the learning and research requirements.

The Library, Archives, and Museums and Collections all hold exciting and important content of interest to aboriginal communities and aboriginal scholars alike. Aboriginal communities also hold some information which they are willing to share with our scholars and the world. We will undertake to facilitate access to this content through digitization projects. As part of our commitment to improving service to this constituency the digitization of this content will be a priority.

Rural Engagement

The Library has an established tradition of serving Albertans and connecting with the community. As early as 1908, the Library provided service to Albertans through the Extension Library, which functioned as a public library service to rural Alberta. While that service was terminated in 1986 when the last regional library system was established and the seven systems assumed responsibility for this service, the University Library System has continued to make its collections available to Albertans through a robust interlibrary loan program, through initiatives such as NEOS and The Alberta Library (TAL). We are connected to rural Alberta, perhaps more than any other University unit, and will continue to offer these services. The Library will continue to support access to collections as an anchor and by taking a lead role in the Lois Hole Campus Alberta Digital Library.

Museums and Collections have also successfully engaged rural Alberta through outreach programs, in particular through the Muse program. The Muse program which is a strategic partnership with Alberta Education and local school boards and associated museums shares the wonders of our collections in a curriculum based K-12 program. The program is currently operating at a reduced level, but with sufficient funding can be expanded. MACS will be exploring opportunities to form a strategic partnership with the Alberta Museums Association to deliver programs, resources and training to the Alberta museum community and their constituents

Our digital projects connect us to the all Albertans and make our collections available to all. We will continue to digitize collections of primary interest to Albertans such as *Peel's Prairie Provinces* in which we have digitized all public domain printed documents relating to Western Canada. Coupled with the digitization of archival material resident in our Archives, and supplemented by digitization of museum and collections art, artifacts and specimens rural Albertans share in our rich resources. These targeted digitization projects foster our connection to these communities.

The Press too connects the University to rural Alberta as it publishes books of local interest; those that capture the history, literature and culture of our region, and those that explore important scholarly, cultural, literary, historical and political aspects of Canada. The Press will continue in these efforts with the introduction of two new series: the University of Alberta Centennial Series and Mountain Cairns – a series on the history and culture of the Canadian Rocky Mountains.

Urban and Civic Engagement

Museums and Collections Services works closely with the Edmonton Arts Council in developing programming and exhibitions. MACS facilitates increased profile and access to collections information for the benefit of the public through physical and virtual exhibitions, program and events coincidental with collections based research. The Curatorial Centre will provide an venue to improve and expand the exhibits, programs and access to collections and the research thereon.

We continue to partner with Edmonton Public Library (EPL) on our integrated library system. This partnership continues to provide cost savings in the administration of the system. We will be

exploring the possibility of further increasing service to students by incorporating an EPL branch within our existing operations. Since 35% of undergraduates have a public library card or access to a family card, this may represent a notable service enhancement without cost. We are also exploring the potential cost and benefit of providing students with an Edmonton Public Library card through an arrangement with EPL, and looking at the establishment of an off-campus U of A/EPL branch underwritten by a private sector developer.

The Technology Training Centre continues to use excess capacity in non-peak seasons to offer outreach services such as Summer Kids Camps, free lab space to local charitable associations and agencies in support of their programs, and Student Connections, a program which reaches out to small and medium sized businesses and to seniors to train them on computers and in the world of e-business.

Of course all of our virtual collections are available. However, one of the newest and most exciting digital collections, particularly for Edmontonians and Albertans, will be the new University of Alberta Centennial Website which is being created through a partnership between Archives, Libraries and the Alberta Historical Resources Foundation.

International Engagement

The richness of the Library's collections, the accomplishments of the staff, and the commitment to the community has not gone unnoticed internationally. The digital projects and collections have been recognized for their excellence. We will continue to showcase the comprehensive digital collections from not only the Library, but from Museums and Collections and Archives, and make these collections available to the world as part of our commitment as a Centre of Excellence for Digital Initiatives.

Our engagement with the aboriginal community to enhance library service in the aboriginal colleges is being heralded across North America. We will continue to share our experiences and learnings with colleagues around the world.

We have worked with the AGA Khan University in Pakistan to assist in the development of their Library services. We will continue to explore initiatives for staff exchange and development.

The University Press has been successful in finding international co-publishers such as the United Nations University Press for some of their titles. This promotes the University of Alberta and shares our research knowledge and activity across the world, as well as providing an injection of funds for the publishing initiative. We will continue to pursue international co-publishing arrangements.

While not included with this document, we have created a table that identifies all the initiatives contained herein, and correlates them to the academic themes and "cornerstones".