PENNSTATE HERSHEY



Advancing Education, Research & Clinical Care

The George T. Harrell Health Sciences Library Strategic Plan 2012 –2015

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Mission

The George T. Harrell Health Sciences Library is central to the provision of biomedical information resources and expertise in support of the education, research, patient care, and community outreach missions of the Penn State Hershey College of Medicine and the Milton S. Hershey Medical Center. The library creates and sustains a stimulating learning environment for the students, staff, faculty, and patients by providing high quality services, facilities and information resources in all formats.

Vision

Your gateway to biomedical information; integrating discovery, research, education, service, community outreach, and patient care.

Values

The Harrell Health Sciences Library is committed to:

- Learning
- Intellectual freedom
- Equitable access to resources
- Superior service
- Agility and responsiveness
- Leadership
- Collaboration
- Diversity
- Stewardship of collections and resources
- Patron confidentiality and privacy
- Excellence in professional practice
- Scholarship in librarianship and related fields

Overview

Libraries are experiencing a fundamental change in how they provide, purchase, access, and use information. All of our long-standing beliefs and assumptions are being challenged, often in ways we are struggling to understand. Delivery of information resources is becoming transparent. Users are unable to distinguish where their information comes from and who provides the content; whether it's provided by the library through a license agreement or free as the result of a Google search. Traditional publishing structures are in flux and open access publishing is creating competition for the commercial publishers. The federal government has mandated submission of NIH supported research publications into the PubMed Central repository, a free digital archive of biomedical and life sciences journal literature. Medical libraries are accelerating the process of making the shift to more accessible online access, especially for journals. Costs for journals, regardless of format, continue to increase at rates far

above normal inflation. The shift from ownership to licensing content has implications for long-term archival access. Many health sciences libraries are experiencing a reduction in stack space in favor of alternative uses or re-purposing library space to better meet the needs of their user populations. Copyright and fair use issues are becoming increasingly complex in the digital world. In addition, over the next 10-15 years the profession will see high numbers of skilled and seasoned library administrators retire as the baby boomers age. These challenges offer libraries and librarians an unprecedented opportunity to reinvent their institutions and themselves, embracing the new information paradigm while retaining the best of the past.

We need to keep abreast of trends in new technologies and plan with our users in mind. It is important that we are aware of changes within our institutions, at the state level and at the national level. These policy decisions can and do have an impact on what we do and how we do it. Reduced grant funding as a result of flat NIH budgets, changes in scholarly publishing (i.e. the mandated submission of NIH supported research publications), and imposition of new laws such as HIPAA, all influence how we can contribute to our organizations most effectively. We need to continue to recruit and retain skilled staff and professionals. And most importantly, we need to acquire skill sets other than those traditionally attributed to librarians (i.e. bioinformatics, web design, marketing etc...). As new roles for librarians emerge, these new skill sets will allow us to better leverage our expertise as information managers, sense-makers, educators, and content creators and providers.

The Harrell Health Sciences Library continues to embrace change and plan for the future. The second floor of the library has been converted into the new Penn State Hershey Simulation Center, which opened in January 2010. Remaining library space was renovated and the library successfully transformed into a digital library, while also taking steps towards becoming a learning or scholar's commons.

The library reports administratively to the Dean of University Libraries while also continuing to report to the Vice Dean for Educational Affairs, Penn State College of Medicine, resulting in a dual reporting structure. The library retains a separate cost center with the budget originating through the COM. This organization has provided an opportunity to leverage our collection dollars to maximum effect as well as take advantage of systems such as the SIRSI catalog, the Serials 360 link resolver and the Illiad interlibrary loan software.

It is important the Harrell HSL align its goals and objectives with the Penn State Hershey Strategic Plan, the University Libraries Strategic Plan, and Penn State University Strategic Plan. Linkages and relationships are indicated throughout the body of the plan. Appendices describing the University Libraries' transition to a digital collection and efforts in developing a cyberinfrastructure, e-content, and data stewardship program are attached. (See Appendices B and C.)

Environmental Scan

To better understand our local circumstances and identify priorities for the next several years, library faculty and staff engaged in an environmental scan utilizing focus groups, surveys and the

SWOT (SWOT - Strengths, Weaknesses, Opportunities & Threats) technique. As a result of the analysis, the library was able to identify a number of broad areas of focus.

- Facilities and services; library as place
- Information technology
- Collections
- Marketing and communication
- Advance and inspire learning and research
- Management and administration, human resources, and diversity
- Budgets/financial sustainability

These areas reflect both internal and external influences. Change is being driven by technological innovation, political and economic priorities and necessities, as well as the changing culture and demographics of our community. We have aligned the areas of focus identified through this process with the five areas of strategic focus outlined in the University Libraries 2008-2013 strategic plan. These areas of focus also dovetail into the strategic goals and objectives included in the Penn State Hershey Strategic Plan. We explicitly address budgets and financial sustainability in the section titled *Agility*. It is important we recognize the need to effectively manage our budget, while also adequately supporting the services, resources and staff necessary to achieve our goals and objectives as they pertain to Penn State Hershey's mission and vision.

While we are moving to an access model based on online delivery of information -- the concept of "library-as-state-of-mind"; it is also important to recognize that the "library-as-place" concept continues to have value. Quoting Freeman, "The library is the only centralized location where new and emerging information technologies can be combined with traditional knowledge resources in a user-focused, service-rich environment that supports today's social and educational patterns of learning, teaching, and research."

Key:

In the following plan, "HY1," "HY3", etc. refer to specific goals enumerated in the *Penn State Hershey Strategic Plan 2010-2011* (http://www.pennstatehershey.org/c/document_library/get_file?folderId=124303&name=DLFE-2511.pdf).

"UL1," "UL3," etc. refer to specific goals enumerated in *The University Libraries Strategic Plan* 2008/2009-2012/2013 (http://www.libraries.psu.edu/psul/admin/stratplanjune08.html)

"PSU1", "PSU7" etc. refer to specific goals enumerated in The Penn State Strategic Plan 2009-10 through 2013-14 (http://strategicplan.psu.edu/summaryofgoals)

¹ Freeman, G.T., <u>The Library as Place: Changes in Learning Patterns, Collections, Technology, and Use.</u> In <u>Library as Place: Rethinking Roles, Rethinking Space</u>. Council on Library and Information Resources, 2005.

Harrell Health Sciences Library Strategic Plan: FY 2012–2015

Services

Goal 1:

Harrell Health Sciences Library will meet the needs of current and future students and faculty through enhanced services that inspire learning and enable the discovery and delivery of information resources.

- 1.1 Educate faculty, staff, and students to become more effective users of information. (HY1, UL1, PSU5)
 - Actively participate in curriculum redesign to ensure information-related learning objectives are included.
 - Explore opportunities to expand integration of evidence-based practice into all areas of the curriculum.
 - Leverage the library website to provide just-in-time and ambient training to all members of the Penn State Hershey Milton S. Hershey Medical Center (PSHMSHMC) community.
 - Pursue partnerships with World Campus so that remote students receive support equivalent to on-site students.
 - Explore opportunities to partner with the Simulation Laboratory/Learning Center to integrate EBM and informatics skills into the overall simulation experience emulating patient-centered evidence-based care.
- 1.2 Provide access, services and resources for Penn State Hershey faculty, students, and staff regardless of geographic location.
 - Develop targeted services to support the recently established geographically separate medical campus in State College.
 - Identify opportunities across PSU to design and develop collaborative and synergistic services in support of the "new biology" while recognizing the unique expertise participating libraries bring.
- 1.3 Expand existing library liaison program to increase communication with academic and clinical departments to improve library service. (HY3, UL1, PSU5)
 - Explore best practices for assessing the effectiveness of the liaison program.
 - Move toward developing specialization in subject areas.
 - Provide expanded liaison services to Penn State Hershey Clinics located throughout Central Pennsylvania.
- 1.4 Increase awareness of full range of services offered by library.
 - Implement marketing plan that targets specific user groups. (See Appendix A)
 - Leverage liaison program to market directly to academic departments.

- 1.5 Review service desk philosophy. (HY3, UL1, UL5, PSU7)
 - Explore partnership with Hershey Medical Center IT to provide on-site technical support in the scholars' commons environment.
 - Explore options and alternatives for service delivery to increase user satisfaction and redeploy staffing so that all faculty and staff are operating "top-of-license."
 - Explore new models of reference service.
- 1.6 Maintain and enhance our outreach role as a Resource Medical Library for the Middle Atlantic Region (Region 1/MAR) of the National Networks of Libraries of Medicine. (UL1)
 - Continue to participate as a full member in the DOCLINE ILL system.
 - Participate in the planning and assessment activities of Region 1 through Library Director Membership on the Regional Advisory Committee and through staff participation on MAR committees and task forces.
 - Serve as an information resource for the region by participating in outreach activities, offering training on NN/LM classes, and applying for funding through subcontracts to support these activities where appropriate.

Strategic Indicators:

- Assess overall user satisfaction with library services and resources.
- Assess the effectiveness and impact of our instructional program based on user feedback and longitudinal EBM study.
- Track and analyze usage of library services and resources.

Collections

Goal 2:

We will develop excellent collections and information resources in support of scholarship and research at Penn State Hershey, while promoting new models of scholarly communication based on the developing cyber-infrastructure.

- 2.1 Strengthen and protect our partnership with University Libraries to broaden our resource base and extend access across all Penn State campuses. (UL2, PSU4)
 - Where feasible, adopt systems being used by University Libraries such as the electronic resources management system (ERMS) and LionSearch, a federated search tool.
 - Develop relationship with University Archives in order to preserve and provide access to archival materials of importance to Penn State Hershey.
 - Actively engage in decision making groups that impact collection development across Penn State, i.e. collection development committees, selectors groups, and on listservs, wikis, blogs, etc.
 - Respond and adapt to new changes in cataloging practices.

- 2.2 Further integrate use of Harrell HSL resources into the research and patient care environments both at Penn State Hershey and across Penn State as a whole. (HY2, HY6, HY8, UL1, UL2, PSU2)
 - Integrate library resources into the clinical workflow.
 - Enhance access to consumer health and patient education resources provided by the institution as a whole.
 - Identify and negotiate new collaborative agreements for access to additional affordable electronic resources in support of interdisciplinary programs in health and life sciences and other cross-campus initiatives such as the Clinical and Translational Science Institute (CTSI).
- 2.3 Increase awareness of the high-quality information resources offered by the library.
 - Implement marketing plan that targets specific user groups. (See Appendix A)
 - Leverage liaison program to market directly to academic departments.

Strategic Indicators:

- Investigate and track overall user satisfaction with the library collections.
- Continue to review collections expenditures balancing current needs with available funds.
- Monitor use of print and electronic collections.
- Benchmark Harrell Health Sciences Library collections and services with Association of Academic Health Sciences Libraries (AAHSL) statistics and other medical library standards.

Information Technology

Goal 3:

We will pursue strategic partnerships to develop and implement innovative information technology services and systems.

- 3.1 Improve access to resources. (HY3, UL3)
 - Redesign the Harrell HSL Web site and Preceptors Portal based on user feedback and web standards to increase usability for researchers, clinicians, and students. (See Appendix A)
 - Solve technical access issues relating to interlibrary loan requests and access to full-text resources.
 - Develop and support access to library resources via mobile devices.
 - Integrate library resources into patient portal and electronic medical record.
 - Integrate library resources into Student Information System web portal.
 - Integrate library resources into Penn State's current and future course management systems.
- 3.2 Develop strategies that will enhance partnerships between Harrell HSL, College of Medicine, Penn State Hershey IT, University Libraries, and Penn State Information Technology Services

(ITS) in order to eliminate barriers and improve access to information resources across all campuses. (HY3, UL3)

- Continue to work with Penn State Hershey, University Libraries, and University Park in the area of data management and curation.
- Assist and become involved in the data management activities within research and the CTSI grant.
- Continue to participate in resolution of identity management issues.
- Partner with Penn State Hershey IT to bring an IT staffer on site in library to provide increased support to College of Medicine community.
- Actively participate in decision making groups that impact information technology and infrastructure across Penn State, i.e. Penn State Hershey IT, Penn State Digital Library Technologies (DLT) and Penn State ITS committees, and on listservs, wikis, blogs, etc.
- Establish partnerships with clinicians, students, and educators at remote locations such as the regional medical campus in State College and World Campus.
- Participate in the development of an informatics degree program.
- Participate in the development of an informatics web portal.

Strategic Indicators:

- Evaluate user satisfaction with online services and resources.
- Explore user perceptions of infrastructure, access, barriers, and ability to provide technical support.
- Successful implementation of new and existing information applications and systems.

Facilities

Goal 4:

We will provide world-class physical space and infrastructure to advance the research, education, and clinical care missions of the institution.

- 4.1 Update library facilities and infrastructure to create an electronic learning environment designed to support the evolving information needs of students, educators, and investigators. (HY3, UL1, UL5, PSU6)
 - Create a strategic plan for a "scholars" or "learning commons" which may incorporate
 existing space or a completely new facility. This plan should address the need for
 collaborative work space, technology support, and support for teaching and learning. It
 should include classroom computing facilities, presentation space, staff space, social
 areas, and quiet and group study zones in a highly flexible configuration. This plan
 should include collaboration among stakeholders such as Multimedia Services, IT,
 Graduate and Medical Education, and Research Support.
- 4.2 Identify opportunities for creating a satellite learning commons/library facility under the administration of the Harrell HSL at the regional medical campus being created in State College. (HY3, HY2)

Strategic Indicators:

• Identify stakeholders to form an evaluation committee and develop a strategic plan.

Diversity

Goal 5:

We will embrace diversity in thought and culture to promote the free expression of ideas among all members of the Penn State Hershey community.

Strategies:

- 5.1 We will strive to maintain and enhance a welcoming climate that promotes equitable access, civility, respect, and freedom of inquiry. (HY7, UL4, PSU4)
 - Ensure that all resources we offer are ADA compliant.
 - Include underrepresented groups in library promotional materials.
 - Investigate campus activities focused on diversity and ensure library representation. (i.e. cultural competency workshops, Diversity Team, etc.)
 - Highlight patient education materials from our collection that are in languages other than English.
 - Make connections between campus initiatives and the library on our website and in our physical space. (i.e. link to Culturevision, display windows) (See Appendix A, Marketing Plan)

Strategic Indicators:

- Successful implementation of ADA compliance in website redesign.
- Track faculty and staff participation in diversity efforts.

Agility

Goal 6: We will be an agile and responsive organization, continuing the role of library as central to achieving the missions of Penn State Hershey, consistent with the vision of the founding Dean, Dr. George T. Harrell.

- 6.1 We will emphasize workforce development and training programs to improve knowledge, skills and abilities to better serve our users. (HY1, UL5)
 - Become a learning organization that encourages risk and experimentation.
 - Provide opportunities for professional development, skill building, and knowledge sharing.
 - Re-evaluate job descriptions when necessary.
- 6.2 We will manage and use our resources responsibly and efficiently with a focus on long-term fiscal sustainability.

• Explore funding opportunities such as grants, contracts, development funds, etc. (HY4

Strategic Indicators:

- Increased participation in staff development/training programs.
- Utilization of assessment outcomes to identify new services and/or improve existing services and resources.

Sustainability

Goal 7: We will be good stewards of environmental resources.

Strategies:

- 7.1 Improve sustainability practices in the library. (PSU 7)
 - Research sustainability activities in libraries.
 - Focus on staff areas and behaviors.
 - Partner with sustainability coordinators at Penn State Hershey, University Libraries, and Penn State as a whole.
 - Investigate benchmarking/baseline measurement where feasible.

Strategic Indicator:

• Improve baseline measurements in recycling, energy usage, and other sustainability measures.

Appendix A: Harrell HSL Marketing Plan

Introduction:

The purpose of this marketing plan is to guide the faculty and staff of the George T. Harrell Health Sciences Library (HHSL) in accomplishing three objectives: increase our user population's knowledge and usage of the high-quality information resources that we currently provide; design new services that satisfy unmet needs of our users; and increase the visibility of the George T. Harrell Health Sciences Library in the academic, research, patient care and community outreach activities of Penn State Hershey.

Primary User Population:

Our current and potential primary user population consists of the groups described below.

- Medical students: on-site in Years Iⅈ various locations, both off and on-site, Years III&IV
- Graduate students: both on and off-site, including World Campus.
- Physicians, including residents, fellows, and community preceptors: both off and on-site.
- Basic sciences faculty and post docs: both off and on-site, including University Park.
- Nursing and Allied Health faculty, staff, and students: both off and on-site. PSHMSHMC has MagnetTM status.
- Administrative leadership: both off and on-site.
- Staff: both off and on-site.
- Patients: throughout Central Pennsylvania and beyond.
- Community: throughout Central Pennsylvania.

Goals and Objectives

Goal 1: Increase HHSL faculty and staff's knowledge and awareness of our users' information needs and work practices.

- 1. Objective: Use web analytics to gauge the most popularly used (and most unused) resources on our website.
 - a. Action steps: Implement analytic tool on our top-level page and sub-level pages. Document steps that need to be taken to obtain a report and store on library wiki.
 - b. Measure: Every quarter, highlights from our web analytics reports will be shared with library faculty and staff at venues such as Public Services Team meeting and Library Administrative Team.
 - c. Action Step Owner: Knowledge Integration and Emerging Technologies Librarian and Associate Director.
- 2. Objective: Gauge interest in specific instructional and news topics by monitoring clicks to online tutorials (i.e. YouTube, Jing) and newsletter articles.
 - a. Action steps: Document steps that need to be taken to obtain reports from all extra-website systems such as Jing, LibGuides, and YouTube and store on library wiki.

- b. Measure: Every quarter, highlights from our usage reports will be shared with library faculty and staff at venues such as Public Services Team meeting and Library Administrative Team.
- c. Action Step Owner: Knowledge Integration and Emerging Technologies Librarian and Associate Director.
- 3. Objective: Implement yearly focus group cycle for all major user groups.
 - a. Action steps: Hold focus groups once a year for medical students, graduate students, clinical and basic sciences faculty/staff. Document steps to holding a successful focus group in the library wiki or network folders (especially keeping track of individuals who have attended each year).
 - b. Measure: Transcripts and analysis from our yearly focus groups will be shared with HHSL faculty and staff and used to track user perceptions and needs. Year-to-year trends will be analyzed.
 - c. Action Step Owner: Associate Director
- 4. Objective: Implement recurring needs/perceptions surveys for all major user groups.
 - a. Action steps: Implement a regular yearly cycle of surveys to medical and graduate students based on year of entry. Implement a multi-year regular cycle of surveys to clinical and basic sciences faculty. Document steps to executing a successful survey in the library wiki or network folders.
 - b. Measure: Data and analysis from surveys will be shared with HHSL faculty and staff and used to track user perceptions and needs. Year-to-year trends will be analyzed.
 - c. Action Step Owner: Associate Director
- 5. Objective: Use DeskTracker to uncover data about instructional and reference transactions.
 - a. Action steps: Implement a regular cycle of data analysis for DeskTracker that examines the content of instructional and reference transactions.
 - b. Measure: Analysis from reference transactions will be shared on a yearly basis with HHSL faculty and staff in order to track user needs for training and new services. Data will be used to inform website design.
 - c. Action Step Owner: Coordinator of Reference

Goal 2: Define the library for easier internal and external identification.

- 1. Objective: Develop a slogan.
 - a. Action steps: Library staff and faculty will develop a slogan to be used for marketing purposes. Strategic Services policy will be reviewed for guidance on where and how to use the slogan in conjunction with our logo.
 - b. Measure: Slogan will be ready for review by HHSL staff and Strategic Services by November, 2011.
 - c. Action step owner: Associate Director/Director
- 2. Objective: Consistently use library name, logo and slogan correctly on signage, marketing and communication materials.

- a. Action step: Library employees will use name, logo, and slogan correctly on all signage and communication materials and in compliance with institutional policy.
 - i. Review all existing signage and replace with branded signage.
 - ii. Ensure that all library employees have access to electronic form of logo and slogan and use branded Powerpoint template.
 - iii. Library employees will incorporate logo and slogan into their e-mail signature.
 - iv. Create branded electronic letterhead and make accessible in library folder.
 - v. Produce a style sheet with guidance for employees that incorporates Strategic Services guidelines.
 - vi. Hold marketing-focused training for all library employees.
- b. Action step: Examine InfoNet intranet and PSHMSHMC website for incorrect versions of our name and ask to have them corrected.
- c. Action Step: Leverage branding possibilities on interfaces for all end-user tools we offer.
 - i. Review all end-user tools and interfaces to identify where branding is lacking.
 - ii. Work with collection development specialist, knowledge integration librarian and University Libraries to place branding on all tools.
- d. Measure: Completion of all action steps.
- e. Action steps owner: Associate Director (primary); all library employees (secondary).
- 3. Objective: Faculty and staff will develop and use their own personalized "elevator speeches" to respond to the question, "What do you do in the library?"
 - a. Action step: Hold workshop for faculty and staff on the purpose of "elevator speeches" and how to develop one.
 - b. Measure: All full-time library staff and faculty will have an elevator speech.
 - c. Action step owner: All full-time library employees once Associate Director arranges for training.
- 4. Objective: Develop a branded "look" for all printed and electronic communications materials.
 - a. Action step: Apply for small grant funds to purchase services of marketing specialist/graphic designer.
 - b. Action step: Work with Strategic Services to ensure compliance with institutional guidelines.
 - c. Measure: Templates developed for materials such as brochures, fact sheets, bookmarks, website, etc.
 - d. Action step owner: Associate Director

Goal 3: More users will become aware of library resources and services that meet their needs and increase in positive attitudes towards and awareness of library.

1. Objective: Users will increase use of specific library resources, through promotional efforts.

- a. Action step: In the current academic year, HHSL will promote two resources, Dynamed and FirstConsult, to spur user adoption and provide a viable alternative if the library loses funding for UpToDate. This will be accomplished with input from concerned stakeholders such as individual faculty and the LAC, and through stories in the Crescent, e-mails to all faculties, messages on the HHSL website, demos at Faculty Organization and departmental faculty meetings, liaison librarian presentations, traveling training and demo sessions, and literature provided by the vendors and developed by the library.
 - i. Measure: Comparison of Dynamed and FirstConsult usage data in Q1-Q2 2011-12 vs. usage data for UpToDate and Dynamed in the same quarters for 2010-2011.
 - ii. Action step owner: Associate Director in conjunction with all library staff.
- b. Action step: Create a marketing strategy for on-demand training services that replace library workshops. This strategy will include an online form that includes a "menu" of training topics. Marketing strategy should include prominent placement on our website, a brochure or bookmark, and placements in campus media.
 - i. Measure: Number of submissions of online form with goal of 56 submissions for FY11-12 (56 was chosen as the goal since this was the number of training "touches" in workshops in 2010-2011).
 - ii. Action step owner: Coordinator of Education and Instruction.
- 2. Objective: Users will encounter positive messages about the library in campus media, both internal and external to the library.
 - a. Action step: Create an annual report, beginning in 2011, for the purpose of communicating value, with an emphasis on senior leadership at Penn State Hershey and University Libraries. The 2011 report will outline library changes and progress in the last 4 years and will be followed with yearly reports to be published in each fall semester.
 - i. Measure: Timely publication of report and dissemination to senior leadership.
 - ii. Action step owner: Library Strategic Operations Group
 - b. Action step: Use media to publicize special events held by the library. Venues include: Crescent; e-mails to faculty organization, graduate, and medical students; Lion's Eye; posters in public locations; flyers on bulletin boards and sent to departments; special page on library website; InfoNet; website "marketing corner"; table tents in library and cafes.
 - i. Measure: Each library event is marketed in multiple venues and the plan is mapped out during event proposal and planning phases.
 - ii. Action step owner: Library staff/faculty who organizes each event with assistance of Associate Director.
 - c. Action step: Use library display windows to publicize services and resources.
 - i. Measure: Library display windows are always filled and library messages are presented on a frequent basis.
 - ii. Primary action step owner: Circulation Supervisor

- d. Action step: Leverage Web 2.0 media such as Twitter or blog that will not be used as destinations in themselves, but as a source feed for output to RSS feeds on library website and other venues.
 - i. Measure: Establish source feed and use to publish frequent short updates.
 - ii. Primary action step owner: Associate Director.
- e. Action step: Designate significant portion of library homepage real estate to marketing messages, in RSS feed from tool chosen in (a).
 - i. Measure: Marketing corner is maintained with frequently changing messages. Hits to the links in marketing corner are monitored.
 - ii. Primary action step owner: Knowledge Integration Librarian.
- f. Action step: Increase the user focus of library newsletter.
 - i. Ensure that library newsletter focuses on short stories that convey library value messages.
 - ii. Move the newsletter to a publication portal, such as LibGuides, that allows article-level statistics.
 - iii. Include links to newsletter articles within the body of the email sent to students and faculty.
 - iv. Measure: Comparison of hits to library newsletter in its current version to hits to individual articles in new version.
 - v. Primary action step owner: Newsletter editor. Target date: October 2011.

Goal 4: Individuals in our primary user groups will be reached through marketing venues specific for their group, with messages specific for their group.

- 1. Objective: Develop marketing venues and tools specific for clinical faculty.
 - a. Action steps: Leverage liaison librarian program to deliver messages about library resources and services, answer questions, and provide training to clinical faculty.
 - i. Measure: At least one meeting with each department per year.
 - ii. Primary action step owner: All library faculty.
 - b. Action step: Develop clinical tools brochure and "how to find a journal" handout for clinical faculty.
 - i. Measure: Decrease in "you don't have this journal" questions in DeskTracker. Increase in use of clinical tools such as Natural Medicines Database and Dynamed. Number of brochures handed out by liaisons throughout the year.
 - ii. Primary action step owner: Associate Director, Coordinator of Education & Instruction
- 2. Objective: Develop marketing venues and tools specific for basic sciences faculty and graduate students.
 - a. Action steps: Develop research tools brochures and "how to find a journal" handout for basic sciences faculty, graduate students and post-docs and distribute this along with links and information about the PSU Research Data Management Toolkit.
 - i. Measure: Timely, recurring completion of action steps.

- ii. Primary action step owner: Coordinator of Education & Instruction with Knowledge Integration Librarian.
- 3. Objective: Develop marketing venues and tools specific for medical students.
 - a. Action Step: Integrate the library into the new student information system, perhaps through adding messages based on academic calendar and medical student year.
 - i. Measure: Inclusion of library in student information system development.
 - ii. Primary action step owner: Director
 - b. Leverage personal librarian program to push messages to students. Have students opt in to this service.
 - i. Measure: Students receive messages once a month from their personal librarian.
 - ii. Action step owner: Associate Director will develop messages for library faculty to send.
- 4. Objective: Develop marketing venues and tools specific for Hershey clinicians in State College.
 - a. Action steps: Create a bookmark for Hershey clinicians with message that we provide services to them. Attend quarterly meetings of all-UP clinicians to deliver library messages and monitor user needs. Assign liaison librarian specifically to support clinics.
 - i. Measure: Timely completion of action steps. Increase in DeskTracker transactions marked "HY/UP."
 - ii. Action step owner: Liaison librarian for State College clinics.
- 5. Objective: Develop marketing venues and tools specific for nurses.
 - a. Action Steps: Gain access to nursing staff portal already in use; integrate library information into the portal. Design print brochure especially for nursing group; distribute at orientations.
 - i. Measure: Timely completion of action steps. Distribution of print brochure at orientations.
 - b. Action step owner: Nursing liaison librarian in conjunction with Associate Director.

Appendix B: Accelerating the Transition to a Digital Collection

Excerpted from:

The University Libraries Strategic Plan 2008/2009 – 2012/2013

The University Libraries are a geographically dispersed collection and are guided by the principle that no matter which campus students attend, nor where faculty members reside, they should have equitable access to all library resources. A student at Penn State Erie should have access to the same resources as a student at Abington, University Park, or a student taking classes online. Likewise, faculty should have access to resources for teaching and research at the point of need. Therefore, the Libraries view the transition from primarily print to primarily digital collections as its main collection development strategy. To date, with the aid of funding from information technology student fees, the Libraries have internally managed the conversion from predominantly print to a large and growing variety of electronic databases and digital resources while remaining sensitive to the maintenance of the traditional print and special collections that represent the mainstay of many areas of research and scholarship. Nevertheless, even with the infusion of IT funding to support central licensing of electronic databases for all Penn State campuses, and attempts to maintain a base level of internal funding to support dispersed print collections, the current collections funding model cannot sustain adequate development of information resources in an age that requires accelerating the transition to digital collections.

The declining value of the dollar and inflation in the publishing industry for both print and electronic resources places pressure on the budget for library materials that is unlike any other. While the Consumer Price Index has risen between 1.6% and 3.4% each of the last ten years, library electronic journal and database costs have risen between 7% and 12% each year. When coupled with the falling dollar, the ability of the Libraries to purchase new or convert to electronic resources is significantly declining over time. In addition, the collections budget continues to erode because of increasing licensing costs for currently held e-journals and databases. Budget recycling also will exacerbate the problem because the Libraries cannot continue to meet recycling goals from faculty and staff salaries alone without damaging the ability to provide the services necessary to support access to and use of our collections. Nor is budget recycling alone likely to provide the funds to accelerate the transition to electronic resources when it also must support the Libraries' new strategic initiatives in building the Cyberinfrastructure needed to advance online collections and services.

The prevalence of interdisciplinary and collaborative research, along with new and developing programs in nursing, life sciences, homeland security, international affairs, computational science, and medicine, create a critical need for access to current journal literature anywhere, anytime. Reallocation within the collections budget alone cannot meet the needs of Penn State faculty or student expectations. In response to the most recent LibQUAL+TM survey of user satisfaction with the Libraries, Penn State students and faculty were consistent in stating that, "we need more electronic journals and more databases." In 2008, and beyond, the ability to access the content in electronic journals and databases is a necessity, not a luxury. Shifting funds from the print to the electronic side of the collections budget alone will not sustain the fiscal

resources necessary for the Libraries to support an advanced curriculum and keep the University competitive.

The University Libraries have made a strong commitment to the transformation from a print collection to one which is primarily electronic. It is actively working to reallocate collection dollars based upon University priorities in new and emerging disciplines. In order for the conversion to digital collections to continue and to accelerate to keep pace with curricular and research needs, additional funding is required. Librarians have compiled a list of resources that faculty and students want which totals more than two million dollars (base budget). To help address this need, the first year of funding for any strategic investment funds returned to the Libraries, regardless of the amount, would be allocated toward accelerating the transition to digital collections. During years 2 through 5, funding would be allocated across Collections, the Knowledge Commons (Appendix B), and Cyberinfrastructure (Appendix C) based on the needs and best potential for impact. (Original document)

Appendix C: Cyberinfrastructure, e-Content, and Data Stewardship

Excerpted from:

The University Libraries Strategic Plan 2008/2009 – 2012/2013

The Cyberinfrastructure, e-Content, and Data Stewardship program is a collaborative effort between the University Libraries and ITS to support the emerging content and data management requirements of e-science and e-research. Future access to digitally based research data is critical to maintaining the scholarly record. Our goal is to build on existing services and infrastructure in both organizations to provide a cohesive suite of access, security, discovery, preservation, curation, repository, archival, and storage services for born digital data. We will standardize on services and approaches that extend benefits beyond the needs of e-science and that can be applied equally to digital content stewardship in areas such as digital library collections, electronic records, and Electronic Theses and Dissertations. The program will require investments in new services and infrastructure to keep Penn State competitive for faculty and future research funding.

E-science or e-research is typically defined as collaborative, distributed, large-scale, and data intensive. The enabling technical infrastructure, including high performance computing and networking, has become more persistent at research institutions. Long-term stewardship of the outputs of the computational sciences is recognized as our next challenge. The emergence of this research has begun to force changes to the traditional scholarly communications model and require attention to how this data is integrated into the formal scientific literature and scientific collections. Our development of this program recognizes increasing expectations from the National Science Foundation and other funding agencies for program applicants to provide a sustainable data management plan, including the provision of open access to data. This program for Cyberinfrastructure, e-Content, and Data Stewardship will provide Penn State's researchers with scalable services to meet these requirements and remain competitive for funding.

The Libraries and ITS now estimate the initial cost of this program to be at least \$2.2M over five years, and the expenses to be shared roughly equally by both. Both the Libraries and ITS budgets include requests for strategic investment funds to support the development of this program. Both organizations will also support the program through reallocations of staff and re-descriptions of positions following retirements. With our own strategic services in place, we will be better positioned to pursue collaboration with other institutions as well as pursue external funding for the development of this program.

The activities and milestones outlined here for the first three years of this new program are clearly tentative since much of our initial efforts will consist of needs assessments in different areas, which, combined with some initial prototyping, will enable us to set more concrete directions and strategies.

The first year, 2008/2009, will entail development of a governance model, targeted needs assessments, some initial service and infrastructure prototypes and pilots, as well as some strategic hiring to enhance our expert teams. The major expense in this year will be for new hires in the Libraries and in ITS-Digital Library Technologies (DLT) that will oversee major elements of the planning, and these will be supported primarily through internal reallocations.

In the second year, 2009/2010, we will collaborate with specific researchers or communities to test and refine some initial services around data collection, storage, and access, including social science and science data. The projected expenditures for this year will include major staffing investments, possibly including data curators/archivists and metadata/documentation experts in the Libraries, new systems developers in DLT, and one new graduate research assistantship in both organizations. Significant investments in new storage infrastructure will be made by ITS.

In the third year, 2010/2011, we expect to have in production fully functional services for some specific data types and services supporting ingest, access, and resource discovery. By this year, we should aim to have basic infrastructure in place that would allow us to seek external research funding for future experimental developments. However, by the third year, we can state planned outcomes only provisionally. The projected key investments in year three include new subject experts and service managers to coordinate the program's operations, digital preservationists/technologists, and documentation/metadata experts in the Libraries. ITS proposes to expand significantly their investments in storage infrastructure through strategic investment funds.

We anticipate that this program plan will develop iteratively as we conduct targeted needs assessments and complete initial phases in the first two years. Activities in years four and five will build on the results of the first three years and should expand the program's capacity to support research across the University. By academic year 2012/2013, our Cyberinfrastructure, e-Content, and Data Stewardship program, developed jointly by the Libraries and ITS, will enable the University to manage and preserve the data created by e-research, and to remain competitive for top faculty and research dollars.

Harrell Health Sciences Library Organizational Chart

