

## Strategic Intentions (1-3 years)

Item	Task	Executive Owner	Collaborators	Expected Outcomes	Assessment
A	<p>Grow the Library as a user centered organization that recognizes users as our primary motivator. Develop systematic methods for consulting our users on an ongoing basis as a matter of course, and value user-centered focus by all library staff. Librarian Coral Sheldon-Hess' user experience thinking outlines five levels/stages of "user experience thinking" for an organization (1= functioning but not great to 5= outstanding). They are:</p> <p>5 – User experience is so ingrained that staff members consider the usability of all of their work products, including internal communications. Staff are actively considerate, not only toward users but toward their coworkers.</p> <p>4 – User experience is a primary motivator; most staff members are comfortable with user experience thinking principles. Users are consulted regularly, not just for major decisions, but in an ongoing attempt at improvement.</p> <p>3 – The organization cares about user experience; one or two champions bring up users' needs regularly. Decisions are made based on established usability principles and studies from other organizations, with occasional usability testing.</p> <p>2 – Some effort is made toward improving the user experience. Decisions are based on staff's gut feelings about patrons' needs, perhaps combined with anecdotes from service points.</p> <p>1 – Decisions are made based on staff's preferences, management's pet projects. User experience [of patrons] is rarely discussed.<sup>1</sup></p>	Colleen Cook	All Library employees. For assessment: Library Assessment Advisory Committee, Ed Bilodeau, Lorie Kloda, Merika Ramundo	<p>Score a "4" in user thinking measurement. See task column for descriptions. Three sets of actions are:</p> <ol style="list-style-type: none"> <li>1. Include user-focused approach in job descriptions and performance assessments.</li> <li>2. Provide heavy initial and periodic ongoing training on principles for library staff.</li> <li>3. Set up lightweight ongoing user feedback and consultation mechanisms.</li> </ol>	<ul style="list-style-type: none"> <li>• Document at least 2 new instances of responsiveness to users using new communications methods.</li> <li>• Improve user satisfaction as evidenced by LibQUAL+ 2015 survey trend line for "Affect of Service" dimension for McGill Library exceeding that of ARL generally.</li> <li>• Level 4 on user experience scale as measured through staff interviews/focus groups</li> </ul> <p><b>Deadline: May 2016</b></p>

<sup>1</sup> <http://www.sheldon-hess.org/coral/2013/07/ux-consideration-cmmi/>

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B	Reimagine the McGill Library of the 21 <sup>st</sup> century by conducting a feasibility study. <sup>2</sup>	Diane Koen	University Services, Campus Planning, Procurement, Colleen Cook, Lorie Kloda	Feasibility study complete with options by December 2014.	Adoption of best option proposed in the feasibility study by McGill's senior administration. <b>Deadline: 2014/2015</b>
C1	Investigate and potentially pilot virtual and physical Research & Teaching Commons to bring together services in support of these activities across campus, and advance library services for the future. Focus on making these services easier to access for users and identify and strategically fill service gaps that exist.	Daniel Boyer	Branch heads	<ul style="list-style-type: none"> <li>• 1 ½ page report of best practices and trends by October 2014.</li> <li>• Implementation plan for recommended Research and Teaching Commons at McGill, including considerations of campus/library-staff buy-in, by May 2015.</li> </ul>	Report with recommendations adopted. <b>Deadline: December 2015</b>
C2	In light of 21 <sup>st</sup> century, user-centered focus in librarianship, evolve the Liaison Librarian model, develop recommendations for consideration and implement accordingly.	Daniel Boyer	Lorie Kloda and TBD	<ul style="list-style-type: none"> <li>• Review of liaison model at the McGill Library.<sup>3</sup></li> <li>• Recommendations for enhancement and augmentation of liaison model.</li> </ul>	Model/recommendations adopted and implemented. <b>Deadline: May 2015</b>
D	Improve access to and discoverability of rare book, special collection, manuscripts and archives based on best practices through the development of: 1) collection development policies and 2) workflows for access to materials in rare books and special collections and archives.	Colleen Cook	Joseph Hafner, Chris Lyons, Christine Oliver, Lori Podolsky, Jenn Riley & Richard Virr	<ul style="list-style-type: none"> <li>• Comprehensive collection development policy for Rare Books &amp; Special Collections and Archives.</li> <li>• Access and discoverability policy and practices formulated.</li> </ul>	<ul style="list-style-type: none"> <li>• Collection development policy for rare book, special collections, manuscripts and archives in use.</li> <li>• Access and discoverability mechanisms implemented. <b>Deadline: December 2015</b></li> </ul>
E	Maintain current discovery layer (WorldCat Local), Knowledgebase (WorldShare KB) and back end ILS (Aleph) for at least one more year. Continue to collaboratively make improvements to the underlying data that drives these systems and focus on staff training. <sup>4</sup>	Joseph Hafner Jenn Riley	Training Working Group TBD including: staff from Collection Services, Digital Initiatives, and User Services	<ul style="list-style-type: none"> <li>• Wide familiarity with the marketplace and pros/cons of various options among library staff.</li> <li>• Sophisticated expertise in utilizing current systems in order to help users at the highest level with present platforms.</li> </ul>	<ul style="list-style-type: none"> <li>• Relevant to position and function, all staff to attend training sessions. Evaluation form/survey distributed at the end of each session.</li> <li>• Higher LibQUAL+2015 scores for Information Control. <b>Deadline: Dec. 2014/Spring 2015</b></li> </ul>
F	Design and provide an orientation and mentoring program for librarians to foster the professional growth and the development of librarians as they progress through the tenure and promotion process.	Carole Urbain	Working Group: TBD	McGill Librarian orientation and mentoring program designed and implemented.	All tenure-track librarians not yet reappointed to be offered a mentor. <b>Deadline to design orientation &amp; mentoring program: Spring 2015</b> <b>Implementation deadline: Fall 2015</b>

<sup>2</sup> The Feasibility Study is the first step in the development of a master plan for McGill Library and Archives. The Study will be produced by an architectural firm with input from University-wide stakeholders. Rethinking and transforming the existing physical and virtual Library System is essential to meet the evolving teaching, learning and research needs of our users. The Master Plan will be an invaluable tool to build awareness and support fundraising.

<sup>3</sup> For examples, see [Simon Fraser University's recent report](#) as well as the ARL report, [New Roles for New Times: Transforming Liaison Roles in Research Libraries](#).

<sup>4</sup> Maintaining both WorldCat and Aleph for one year will allow the marketplace to mature before making further major changes. Monitor developments during this time so that we can be prepared to strategically and efficiently move forward when the time comes.

## Immediate Priorities

Item	Task	Deadline	Executive Owner	Potential Collaborators to date
1	Set up intranet technology, and work with early adopters (including Digital Initiatives) to begin use.	Summer 2014	Jenn Riley	Ed Bilodeau
2	Restructure internal communication mechanisms to reduce volume of irrelevant email and allow library staff to easily reach the staff that they need to communicate with.	Summer 2014	Jenn Riley	Merika Ramundo
3	Ensure all content formerly in SFX/MetaLib is represented in the OCLC Knowledgebase.	Winter 2014	Joseph Hafner Jenn Riley	
4	Improve mechanisms for reporting and responding to problems with discovery systems.	Summer 2014	Joseph Hafner Jenn Riley	
5	Set up production workflows for pushing all digitized Canadian, unique, and rare textual material to Hathi Trust.	Winter 2014	Jenn Riley	Sarah Severson
6	Ensure all electronic theses are represented available through the WorldCat Local discovery layer.	Winter 2014	Jenn Riley	Megan Chellew & Sarah Severson
7	Create matrix of highest digitization priorities for Archives and Rare Books & Special Collections, to drive future digitization activities and guide responses to digital project and digitization requests from users, partners, and library staff.	Summer 2014	Jenn Riley	Working Group: Richard Virr , Lori Podolsky, Chris Lyons, Jenn Riley, Sarah Severson, Joseph Hafner & Digital Projects Committee
8	Identify needed resources and design new workflows for significantly scaling up digitization activities and other related tasks needed to deliver digital content online to users.	Summer/Fall 2014	Jenn Riley	Megan Chellew & Sarah Severson
9	Begin work on a repository for campus research data. Consult campus stakeholders on needs. Plan for integration of our local system with consortially-run preservation environments.	Fall 2014	Jenn Riley	Digital Initiatives staff members TBD

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10	Raise awareness of Open Access issues on campus.	Fall 2014	Jenn Riley	Amy Buckland
11	Redesign web hosting environment in collaboration with CCS so that library staff have more flexibility with the deployment of changes to the Library web site.	Winter 2014	Jenn Riley	Ed Bilodeau & Branch/Unit Heads
12	With input from librarians and library staff, develop a set of principles for timing of updates to the library web site.	Winter 2014	Jenn Riley	Ed Bilodeau & branch/unit heads
13	Investigate feasibility of adding dynamic floor plans (map button) to WorldCat Local.	Summer 2014	Jenn Riley	Ed Bilodeau, Greg Houston, Merika Ramundo
14	Enhance training for staff to ensure an understanding of new resources and technology.	Summer 2014	Joseph Hafner Jenn Riley	
15	Add a computer availability map to public LCD screens in all branches that have these screens.	Summer 2014	Jenn Riley	Ed Bilodeau, Greg Houston, Merika Ramundo
16	Reconstitute the Collection Stewardship Committee to review collection issues including reviewing and communicate weeding policy to all staff and creating guidelines related to collection storage and other collections issues.	Winter 2014, ongoing	Joseph Hafner	Working Group: Louis Houle to lead one rep from DI and each branch (Law, Music, Mac, Osler, Islamic, Rare, HSSL, Archives, Schulich)
17	Any duplicate or wrong call numbers will be reported to CS and corrected. Collection Services managers will review workflows to ensure best practices are in place.	Winter 2014	Joseph Hafner	Louise Robertson
18	New materials shipped to branch libraries (outside the McLennan/Redpath Complex) will have an "in transit" status to show it is going from CS to the branch.	Winter 2014	Joseph Hafner	
19	Continue automating and improving workflows for e-book cataloguing ensuring discoverability (e.g. Pilot shared e-book cataloguing project with U of T).	Summer 2014	Joseph Hafner	
20	Eliminate existing backlog of non-rare print materials and keep up-to-date with cataloguing of new print materials.	Summer 2014	Joseph Hafner	Louise Robertson

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21	Develop a storage best practice procedure document for McGill Library and Archives. Post and ensure all staff members involved with storage and shelving are trained. Recommendations to be implemented by the end of Summer 2014.	Summer 2014	Diane Koen	Lori Podolsky & Richard Virr
22	Improve public washrooms in HSSL and if possible, expand and renovate the Redpath main floor washrooms.	Fall 2014, underway	Diane Koen	Francisco Oliva, University Services
23	Continue to check regularly for bedbugs and mice.	Ongoing	Diane Koen	Francisco Oliva
24	Develop and implement Noise Level Study Zones (very quiet to very noisy) in all branches and develop policy for food in the Library.	Summer 2014	Diane Koen	Working Group: Branch Heads, Francisco Oliva, Merika Ramundo
25	Acquire new public seating made of wood, plastic or covered in durable, easy to clean "leatherette" fabric. Damaged furniture that is covered under warranty will be replaced with same model/material.	Immediate & ongoing	Diane Koen	Planning & Resources staff
26	Increase number of Spirit Scanners in branch libraries.	Winter 2014	Diane Koen	Branch Heads to determine needs
27	Launch newly renovated McLennan Redpath Terrace as a smoke-free environment.	Spring 2014	Diane Koen	University Wide Committee
28	Branch signage, bookmarks and floorplans to be updated to reflect current changes.	Winter 2014, in progress	Diane Koen	Greg Houston, Francisco Oliva, Merika Ramundo & Branch Heads
29	Install print returns bin (currently on order) in Schulich.	Winter 2014	Diane Koen	Francisco Oliva
30	Review and adapt Student Navigator hiring procedures with branch/unit heads to ensure the best candidate is hired for each position posted.	Winter 2014	Daniel Boyer	Daniel Boyer & Branch Heads
31	Assess service and study hours offered in Library Branches and develop a methodology to set opening and service hours that meets both user needs and available resources. Analyze security needs in all branches in order to offer a safe and welcoming environment to the McGill community.	Summer 2014	Daniel Boyer	Daniel Boyer & Branch Heads
32	Assess the Chat Reference service with a focus on the nature and content of the questions asked and quality of answers given. This will be followed by an analysis of the volume of usage to improve the range of virtual reference service and staff accordingly.	Summer 2014	Daniel Boyer	Daniel Boyer & Lorie Kloda

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33	Review the implementation of a Single Service Point in all branches and develop recommendations for continuous improvement.	Summer 2014	Daniel Boyer	Daniel Boyer & Lorie Kloda
34	Determine actionable items from ClimateQUAL feedback.	Ongoing	Colleen Cook	Lorie Kloda & Isabelle Roberge
35	Improve communication to and from the Dean's Office to all staff.	Winter 2014	Colleen Cook	Dean's Cabinet, Bruna Ceccolini, Merika Ramundo
36	Dean's Corner held four times per year.	Winter 2014	Colleen Cook	Bruna Ceccolini, Merika Ramundo
37	Colleen's Coffee held in each branch throughout the year.	Winter 2014	Colleen Cook	Bruna Ceccolini
38	The Dean will attend at least one staff meeting in each unit yearly.	Winter 2014	Colleen Cook	Bruna Ceccolini
39	Dean's Cabinet and unit heads to review current meeting structures with their staff to determine: necessity, scheduling, length and impact.	Winter 2014	Colleen Cook	Dean's Cabinet & Branch/Unit Heads
40	Write job descriptions for librarians	Summer 2014	Carole Urbain	Isabelle Roberge
41	Committee Information will be kept up to date on the U drive. Library documentation will exist on the U drive with a transition to the intranet when appropriate.	Summer 2014	Carole Urbain	Library Council Secretary and Committee Chairs
42	Strategic Intention documentation will be maintained on the Strategic Intentions website. Progress towards goals will be tracked. When changes occur, biweekly Managers Meeting staff will be informed and information passed on to each unit through the meeting notes.	Ongoing	Colleen Cook	Lorie Kloda & Merika Ramundo