MEMORANDUM

ATTENTION	Members of Senate	**DATE**	March 16, 2021
FROM	Dugan O'Neil Vice-President, Research & International pro tem	**PAGES**	
RE:	Library Mid-Cycle Report		

Please find enclosed the 2017 Library External Report Action Plan
Mid-Cycle Report: Feb 2021

2017 Library External Report Action Plan
Mid-cycle report: Feb 2021

The library has made considerable progress on many of the recommendations from the 2017 review, and the resulting March 2018 Action Plan. Completion of the Bennett Library Master Space Plan has moved planning forward in several areas. Recommendations for additional personnel to focus on e-Branch, collection assessment, and other emerging areas have been addressed from within the library's budget where possible, although there have not been opportunities to apply for base budget increases to create new continuing positions since the review. Progress on some initiatives has been paused, or priorities have changed, due to the pandemic.

This update was prepared by Library Management and reviewed by the Senate Library Committee in February 2021.

Physical Space		
RECOMMENDATION	**ACTION PLAN**	**UPDATE FEB 2021**
Recommendation 1.1: Endorse plans for aggressive weeding relocation/removal of the print collections which will be necessary in order to renovate Bennett and respond to the changing needs of users. Dramatically reduce the collection footprint to create more study space (both individual and group). Expand Student Learning Commons. Improve the quality and adjacencies for staff space. Create faculty space.	Collection reduction and creating additional student space aligns with Master Space Plan, and Strategic Plan initiative 1.4.1a. Decisions to remove items to storage or withdraw will be based on best practice, including participation in shared print initiatives, different patterns of use by discipline, data about scarcity & usage, along with other factors. ILL services will continue to be available. Master Space Plan will address space recommendations, working incrementally until full renovation of Bennett Library is possible	A review of the Collection Policy is underway with plans to complete in 2021 -- renewing the deselection policy is included. In 2019/20, the first systematic weeding of about 50% of the 4th floor was mostly completed (stalled by C19). Guidelines, tools and procedures created for this project can be adapted for future ongoing deselection work when the policy is updated. In Bennett Library we created space on the 4th floor for the new Indigenous Curriculum Resource Center through deselection and relocation in 2019. We created space for the Media and Maker Commons through relocation in 2019.
Recommendation 1.2: Increase downtown space for research commons / graduate student services.	Will explore options for RC space downtown with AVP Academic & Vancouver campus administration; likely not possible within Belzberg Library footprint	Vancouver research commons in final stage of completion Jan 2021; expect launch by summer 2021 (dependent on COVID-19)
Recommendation 1.3: Aggressively weed collections at Surrey, investigate opportunities for licensing and promoting use of ebooks for portions of the collection where the content likely changes frequently.	Weeding currently underway at Surrey with goal to provide improved access to current, relevant collections, and create additional student space	By April 2019, completed initial withdrawal project, removing 115 linear feet of items. Currently (February 2021) conducting inventory with plans to implement another withdrawal project. Fraser collection promotion ongoing, in

		partnership with Bennett. Licensing of ebook use not within Fraser's mandate.
Recommendation 1.4: Consider aggressive weeding for Downtown in order to create graduate space and additional study space.	Regular weeding takes place annually at Belzberg; further reductions may not be possible without detrimental effect on Vancouver programs. Options for study space elsewhere on Vancouver campus will be pursued as per 1.2 above.	Collection inventory underway; weeding to commence mid-late 2021
Recommendation 1.5: Maintain Library control over library space and establish core principles for evaluating potential of shared spaces. Support student-facing and faculty-facing services with a strong focus on teaching, learning and research as opposed to back-of-house administrative functions.	Develop core principles for use of Library space; integrate into Master Space Plan and other space development. Involve AVP Academic, Senate Library Committee in process.	Bennett Library Space Plan complete and endorsed by university executive; concept plan underway to support funding. Fraser Library's proposal for library expansion received 40% of funding requested in 2019; plans on hold due to pandemic. New Vancouver Research Commons space to be completed Feb 2021; Belzberg desk redesign project to be completed Sept 2021, including addition of new bookable study room and updated consultation space.
RECOMMENDATION	**ACTION PLAN**	**UPDATE**
Recommendation 2.1: Explore centralizing the operational budgets for all three campus libraries to allow for better utilization of limited staff resource dollars and training opportunities across the three campuses	We will initiate discussions with senior administration about budget structure in order to ensure sufficient budget allocation at all campuses, and increase flexibility.	Collections budget centralized for all three locations; discussion of operating budget structure was pursued with senior administration; no change to budget structure at present.
Recommendation 2.2: Operationalize innovation: secure sustainable base funding for critical programs like research data management and digital humanities.	We will use Budget Review Committee process to request base funding for emerging areas. Explore new funding channels with VPRI as they become available.	Budget requests have been submitted through Budget Review Committee in years when this has been available. No central funds have been available in past two years; vacant positions have been repurposed where possible. Completed: Added the Media and Maker Commons and created a permanent position for a Makerspace Librarian 2019.
Recommendation 2.3: Establish an Advancement Team (advancement, communications, events, stewardship). This group should meet together on a regular basis with the University Librarian to ensure	Establish Advancement Team in 2018 including Advancement, Communications, Special Collections, University Librarian.	Completed. Advancement team established in 2019 and meeting quarterly.

that they are working toward common objectives.		
Recommendation 2.4: Draft an Advancement Plan establishing key objectives and strategies for each member of the Advancement Team over a 3 year rolling cycle.	Agreed, in consultation with Library Advancement Officer and University Advancement	In progress. Renewal campaign strategy and plan to be integrated into the University Advancement plan when available. Library advancement and fundraising plan to be integrated in the Library's strategic communications plan.
RECOMMENDATION	**ACTION PLAN**	**UPDATE**
Recommendation 3.1: Blend ILL and Access Services in Bennett to better leverage expertise and support cross training.	Use upcoming vacancy in Head of Access Services in 2018 to explore closer integration of Loans and ILL, and fuller development of Access Services model	Additional term loans supervisor position in Access Services provides some ILL supervision support. Due to other strategic priorities and COVID-19 service changes, further changes to ILL and AS are still under consideration.
Recommendation 3.2: Add expertise in eBranch.	Upcoming review of library digital initiatives will include consideration of eBranch requirements; agree this is a priority when continuing funding becomes available.	Demand for expertise from the eBranch area remains strong and there is a need for technical expertise to support digital collections. ADL, Digital Strategy will continue to consider this as part of development of Digital Strategy.
Recommendation 3.3: Add expertise in collection analysis/assessment.	We are creating a temporary collections librarian in 2018 to work on analysis and assessment; agree this is a priority when continuing funding becomes available	Term collection assessment librarian position has been renewed and is still in place; seeking funding to make continuing.
Recommendation 3.4: Add expertise to support new programs (e.g. Surrey's new engineering program).	Budget Review Request for SE3P support was included in 2018 submission; deferred to 2019 due to program start date	$103,000 base budget transfer to collections budget for SEE program; collections established and development is ongoing.
Recommendation 3.5: Allow positions to be moved from one campus to the other.	Relates to 2.1; will include in discussions with senior administration about budget structure and flexibility	No change to budget structure (see 2.1). Dean, ADL and branch heads meet regularly with Vancouver and Surrey campus ED's for communications and planning purposes.
Recommendation 3.6: Communicate more effectively to CUPE (and other) staff regarding their training opportunities. Clarify policies around available funding and salary coverage for training "after hours."	Agreed. We will clarify policy and practice in this area, review as necessary, and communicate with staff. Goal to create clear career development path for Library CUPE staff	Formation of Training Plan Advisory Group. Policies exist on [Learning and Development Funding Policy](#) and [Library Guideline for Time Off to Attend Staff Training and Development](#)
Recommendation 3.7: Offer more training opportunities geared to non-librarians.	Seek clarification about desired training opportunities for non-librarians and follow up as necessary.	In 2018: 15 L&D sessions held for staff generally, 4 sessions targeting librarians and APSA, and 1 targeting managers.

		In 2019: 12 L&D sessions held for staff generally, 3 sessions targeting librarians and APSA, and 4 targeting managers. In 2020: 4 L&D sessions held for staff generally, 2 sessions targeting librarians and APSA, and 1 targeting managers.
		Training Plan Advisory Group formed to provide input into training plan.
Recommendation 3.8: Offer training to librarians (and other interested staff) on effective strategies for getting grants to support research.	We will liaise with Research Services & library funding experts at other institutions to offer training in this area in 2018	Research Interest Group organized a session with Grants Librarian from UVic to discuss librarian research in 2018. Details of general SFU information sessions on SSHRC grants have been shared with librarians. Policy change was pursued so that librarians are now eligible for small institutional SSHRC grants. Further training with grants facilitators will be pursued.
Recommendation 3.9: Explore opportunities for staff exchange program with international partners.	We will investigate the benefits of and mechanisms for international staff exchanges; promote SFU Staff Internationalization Fund to library staff	Currently not a high priority due to international travel restrictions.
Recommendation 3.10: Identify new ways for ensuring staff on the three campuses interact with each other on a regular basis.	We will consult with staff to learn more about desired cross-campus interaction and follow up as appropriate	Lessons from virtual meetings and events during pandemic are providing useful model. Considering how to apply this post-pandemic to allow more cross-campus interaction.
Future		
RECOMMENDATION	**ACTION PLAN**	**UPDATE**
Recommendation 4.1: Maintain the current reporting relationship to the VPRI.	Agreed	Maintained
Recommendation 4.2: Explore an organizational linkage between the University Archive and the University Library. Could the University Archivist have a dual (or even dotted-line) report to Secretariat and University Librarian?	We will initiate discussion with University Secretary, University Archivist, and senior administration about the relationship between Library and Archives.	Formal exploration of this idea pursued in 2020; new monthly meetings between Dean/University Archivist established for 2021, discussions ongoing.
Recommendation 4.3: Create formal acquisitions policies for both Special Collections and the University Archive. Ensure clear differentiation regarding who	Aligns with library strategic plan initiative 1.4.1c; we will coordinate with Archives to harmonize policies	SCRB created acquisition policy in 2018. UA plans to finish theirs in March 2021 and will then circulate it so UA and SCRB can collaborate to differentiate collection

		practices in mutual areas of interest. In the meantime, SCRB continues to consult with UA on potential donations where we perceive shared interest.
collects what.		
Recommendation 4.4: Reframe the Strategic Planning Leadership Committee as the Strategy Implementation Team or the Strategic Management Team or the Strategic Oversight Team to convey their critical responsibility for implementing or managing the vision.	We will consider the name and mandate of the SPLC and Library Council in 2018 and clearly convey any resulting changes to all staff	This review is underway in early 2021 (Feb-March).
Recommendation 4.5: Continue to ensure that any team struck to facilitate strategic planning in the library is composed of representatives from all staffing groups.	We will find a way to re-engage staff throughout the library with the strategic plan in 2018 & on in context of actions for 4.4	Strategic plan will be renewed in 2021; all staff groups will be represented on working group.
Recommendation 4.6: Create a strategic plan for managing the University Library's digital initiatives.	Agreed. This will follow activities under 4.9	Consultation with stakeholders is underway in 2020 & 2021. Digital strategy will be completed prior to development of the next Library Strategic Plan.
Recommendation 4.7: Expand the DHIL to focus more broadly on digital scholarship rather than digital humanities. Leverage the Library Master Space Plan effort to help address appropriate spacing for the DHIL.	We will consult with DHIL stakeholders on ways to expand digital scholarship services and maintain linkages to DHIL activities. We believe there is merit in maintaining a specific focus on DH under the wider umbrella of digital scholarship support	Working closely with researchers, academic directors of DHIL, FASS, and VPRI office, to plan for expanded digital scholarship facility and capacity.
Recommendation 4.8: Strengthen digital publishing -- leverage BC initiative in OER textbooks	Agreed. Library will continue to lead OER grants program with TLC and to support OER adoption through Teaching & Learning Librarian and other liaison librarians; New Digital Publishing division will work with Teaching & Learning Librarian	OER Grants Program continued 2016-2019, alongside OER Working Group and faculty-targeted programs. Digital Publishing and PKP have grown support for open access publishing, including in-class publishing projects and student and course journals. Teaching & Learning Librarian drafting a strategic recommendation to strengthen digital publishing infrastructure for OER, deadline end of FY21.
Recommendation 4.9: Consider bringing together digital initiatives under an AUL position.	We will review the portfolio of ADL Library Technology Services & Special Collections with this recommendation in mind and in consideration of 4.6	Completed

RECOMMENDATION	ACTION PLAN	UPDATE
Recommendation 4.10: Expand community engagement activities -- leverage position of Surrey and Downtown campuses in this regard.	We will continue to develop the library's community engagement activities, including Surrey, Vancouver, Burnaby	Fraser Library recruited and hired .5FTE User Services and Engagement Librarian; Community Scholars Librarian moved into 312 Main and works closely with CERi; Library-sponsored events such as One Book One SFU and Dean's Lecture have continued to attract many community members.
Recommendation 4.11: Consider membership in Pacific Rim Research Library Association (http://pr-rla.org/).	We will investigate the benefits of PRRLA membership	Will pursue once current travel restrictions are lifted.
Recommendation 4.12: Draft a University Library plan for responding to the TRC Calls to Action/CFLA/SFU plan.	Agreed. Work has begun and will continue through 2018 and beyond	Decolonizing the Library Working Group has been active since 2018. Action plan has been created and is underway. Funding from Aboriginal Strategic Initiative has enabled development of Indigenous Curriculum Research Center (ARC call to action 21), and Indigenous Digital Media Specialist (term position).

Communication

RECOMMENDATION	ACTION PLAN	UPDATE
Recommendation 5.1: Draft a communication plan. This document should document the key messages to be communicated to specific stakeholder groups as well as the specific strategies to be used to convey those messages to those groups.	A simple plan exists and is updated annually; will work with Head of Library Communications to elaborate on this plan, include more detail	Turnover in communications officer role has delayed work on formal communications strategy; to be completed during the library strategic plan renewal process in 2021.
Recommendation 5.2: Explore a social media strategy as well as an internal social media policy.	Changes to staffing of social media have taken place since site visit; will address this recommendation, including internal social media policy	Social media function is now integrated into continuing library communications officer role, and internal guidelines for social media have been developed. A social media strategy will be integrated into the library's communications strategy (see 5.1).
Recommendation 5.3: **(Re: ILS)** Reach out proactively to the campus community to address issues of concern. Post regular updates on the status of deliberations and fixes.	An internal task group has been formed (Primo for Public Services); we will develop a communications strategy for the campus to provide regular updates in 2018 & beyond. Initial message from Dean sent to campus sent in Feb 2018	Completed
Recommendation 5.4: (Re: ILS) Provide	We have compiled feedback from migration	Completed

detailed feedback to the vendor outlining user frustrations during the implementation process.	experience and shared with vendor since site visit, made contact with new support level at ExLibris	
Recommendation 5.5: (Re: ILS) Use the opportunity of user focus on the ILS to engage the campus community in a broad discussion of metadata more generally, and the importance of new and emerging frameworks of description (such as linked open data) to digital scholarship and research.	We may explore this after actions have been taken on 5.3 & 5.4	In lieu of a broad discussion with the community, we are piloting a Metadata Consultation service, working primarily through DHIL to advise researchers on metadata best practices for their projects, both on a one-off basis and in some ongoing roles (e.g. SpokenWeb). Metadata is included on the *Library Services for Research Projects* page. This addresses the core point in the review recommendation about the importance of metadata to digital scholarship and leveraging the Library's expertise in that area.