



UNIVERSITY
of York



LIBRARY & ARCHIVES STRATEGY 2018–2020

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Introduction

The existing Library Strategy closes at the end of academic year 17/18. At this point it has been decided that rather than developing and launching a new strategy, the current iteration will be refreshed and run from 2018-2020. This reflects that many of the drivers outlined in the previous strategy remain relevant moving forward and will draw the Library & Archives Strategy in line with the planning period for the IT Strategy allowing for co-planning and harmonisation as appropriate.

Review of the previous strategy

Progress on the current strategy has been reported to ISG over the planning period. The following paragraphs therefore just provide a brief overview of development.

The 2015-18 strategy focussed on four main themes:

- Access to knowledge
- Enhancing teaching and learning
- Facilitating research excellence
- Improving performance

Access to knowledge

Access to knowledge, through our own collections, or those collections held elsewhere, underpins the intellectual efforts of the University in learning, teaching and research.

Our Access to knowledge key theme challenged us to:

- Understand our collections
- Define our collections strategy
- Improve discovery and access
- Build collections for learning, teaching and research

We have made good progress with this key theme over the past three years, but challenges still remain hence this area of activity will be reflected in the new strategy.

Two major developments around discovery have been delivered, firstly Leganto, our new reading lists system, which has been welcomed by the academic community as a significant improvement in functionality over the previous software. Leganto has resulted in an improved uptake of the new reading list system amongst academic colleagues, which will have a subsequent improvement in access to reading list materials for students.

Secondly, AtoM (Access to Memory) has provided the Borthwick Institute for Archives with an archival management system, and a means by which customers can search and retrieve information about the archives. This will significantly improve discovery and forms a sound basis on which the Archives can continue to build.

Our understanding of collections assists with defining our content strategy and we have gained additional knowledge through focussed work on our own collections and through collaboration with White Rose Libraries. Our use of collection analysis tools has led to a greater understanding of our collections, and has allowed us to move forward with collection categorisation. This has highlighted the make up of collections and identified stock for de-selection, core research titles, and areas for continued development.

We have continued to refine purchasing mechanisms to build collections in direct response to user demand, and have seen undergraduate satisfaction with access to information improving as a result. Digitisation of resources also offers new opportunities to engage with existing resources and this period has seen the digitisation of the Archbishops Registers and the Retreat archive. This has been achieved with the support of external funding from the Mellon foundation and Wellcome fund respectively.

Enhancing teaching and learning

Within this theme our focus fell on:

- Supporting the York Pedagogy
- Digital literacies for staff
- Developing spaces
- Improving access to services
- Supporting the distance learning agenda

Projects running under other key themes have contributed to enhancing the teaching and learning experience, but our major activity in this area has delivered significant improvements. Colleagues in the Relationship Management Team worked alongside the University's Propel team, contributing in particular to the mapping of skills development in programmes and modules. This ran alongside the development of resources supporting digital skills for students culminating in the production of a [Skills Guide](#) website.

Our MOOC "Becoming a digital citizen" launched in Spring 2017 and was extremely successful, with the content continuing to be used in other teaching. We have also worked alongside academic colleagues in the development of the International Pathway College and online learning, particularly the new modules being offered through the University collaboration with Academic Partnerships.

Study space was and still is an issue for the student body, but we have added over 100 spaces to the main University Library over the strategy period through the de-selection of unused stock and movement of resources to our external store. 2018 has seen the launch of Library@Piazza, offering 50 study spaces at the Heslington East campus.

An emphasis on continuous improvement is core to our operations (as well as being one of our Directorate values), and our systems and services are subject to regular scrutiny. The implementation of the new Digital Content Store from the CLA has led to process improvement and was, from a customer perspective, a seamless transfer of files to the new system.

Online chat has now been introduced and is becoming increasingly popular, and has influenced an increase in uptake of our overnight chat service QuestionPoint.

The introduction of laptop loans was a success with students, and numbers of machines have been increased to meet demand. The service will be extended to Library@Piazza in the summer term 2018.

Facilitating research excellence

Our objectives here focussed around:

- Supporting the York Graduate School
- Supporting scholarly communications
- Supporting research data management
- Improving services to researchers

We have continued to develop and refine our service offering to researchers and research students, and contributing to the research infrastructure of the University. Restructuring has enabled us to focus increased support to output and data checking in PURE and working with colleagues in Research and Enterprise we have enabled a data catalogue through the York Research Database. Staff in the Library Research Support team have offered support and training on open access and research data management across the University. Participation in the review of Researcher Development training has enabled us to refine our offer and late in 2017 the RDM 101 training module was launched along with guidance on bibliometrics.

We continue to develop our open access and research data management services. Our work on digital preservation is acknowledged as being sector leading, and we are working with Jisc on Research Data Shared Services, creating a full infrastructure for deposit, storage, discovery, preservation and archiving of research data and other digital outputs.

The development of White Rose University Press with the Universities of Leeds and Sheffield has created the first consortial, digital, open access press in the UK. We have been pleased with the uptake of this opportunity by York authors, both for journal and monograph content, with the first York monograph due for publication in late March.

We have also worked with the York Graduate School to enhance the experience of postgraduate researchers students, offering skills sessions tailored to the postgraduate community (including taught postgraduates) and launching a fund to support the research needs of this group.

Improving performance

Our objectives under this theme concentrated on:

- Understanding requirements
- Ensuring financial viability
- Communications and marketing strategy
- Compliance

This key theme has seen a great deal of activity across Library & Archives with developments benefiting our customers and the experience of our staff.

In 2014 we invested in staff development in UX (user experience) and have benefitted from the use of these techniques to gain understanding of the experience of our customers, and to ensure customer focussed service development. In 2017 UX was used in an extensive project to gain a better understanding of our academic colleagues. These insights have already been used to implement services changes, and we anticipate further use of this rich data source in the future.

Behind the scenes we have been pleased with the implementation of an Alma/Agresso link, which harmonises information between our library management system and Agresso. We have continued to make progress with customer driven purchasing, ensuring good take up of resources added to stock.

2016 saw the launch of the Friends of Library & Archives giving circle, and we are grateful to the Office for Philanthropic Partnerships and Alumni for their assistance in bringing this to fruition. A lecture series is part of the offer to our Friends and we welcomed our patron, Anthony Horowitz to the University for our Autumn term lecture in 2017. We are currently planning a crowd-funding initiative with OPPA for digitisation of archive material.

Our focus on customer experience has seen us maintain and improve our performance in our Customer Service Excellence accreditation, and “Delivering Service Excellence” continues as a key part of our staff training offer.

Mandatory Information Security Training has been rolled out across the University for all staff. Take up has been strong in many areas and training is now being considered for students, in particular, research postgraduates.

Our excellent performance, collectively and individually, has been recognised in a variety of ways, direct customer feedback, shortlisting for national awards (THELMAs, and Digital Preservation Awards), and winning awards (CILIP Marketing Excellence, YUSU Academic Officers Excellence Award, Vice-Chancellor’s Teaching Award, Informed Peer Recognition Award).

Strategy 2018-2020

Satisfaction scores summary 2018

As can be seen from the table below, satisfaction scores with our services remain strong, although the slight drop in scoring in the NSS but a more substantial fall in ranking is concerning. In 2018 we will run LibQual+ once more and set alongside the 2018 NSS score we will be able to understand whether there is a trend of diminishing satisfaction. From both sources we will be able to identify particular departments or customer groups should we need to identify areas for improvement.

Question	Survey	2014	2015	2016	2017
The library resources and services are good enough for my needs / The library resources (e.g. books, online services and learning spaces) have supported my learning well	NSS	89%	90%	90%	89%
The library resources and services are good enough for my needs (including physical and online)	PTES	83.8%	Didn't run	86%	Didn't run
There is adequate provision of library facilities (including physical and online resources)	PRES	Didn't run	84.5%	Didn't run	86%
Overall satisfaction with the quality of our Library service (out of 9)	LibQUAL+	7.44	7.47	7.5	Didn't run
Main texts and readings I need for my work	LibQual+	7.12	7.14	7.06	Didn't run

In our strategy 2015-18 we introduced key principles which underpinned our projects and activity. These are listed below and we will continue to work with these principles over the forthcoming strategy period.

Key principles

- Access to services and information 24/7 365
- Self-service with access to support in case of need
- Working in partnership with academics, researchers, students and support services across the University to deliver services appropriate to needs
- Working in partnership with external agencies locally, nationally and internationally where this is of benefit to the institution
- Maximising the benefits from investment in services through improvements to internal process and decision making, partnership with other institutions, or challenging suppliers on charging and costs

- Decisions based on sound management information and customer needs
- Enhancing the user experience

We now add another principle to those above in support of the new Equality and Inclusivity Strategy:

- Demonstrate personal responsibility to promote inclusive practice in all our activities, including in the planning, design and delivery of our services

New strategic themes: Space – Scholarship - Skills

Space

Space: Introduction

The availability of space in the University Library remains an issue with students and a source of dissatisfaction despite 24/7 362 access. The current space is unable to satisfy demand for study space at peak times of operation.

January 2018 has seen the opening of Library@Piazza at Heslington East. This is our first study space without physical collections and we will be monitoring use of this space and gathering feedback from students on the impact of this facility on their learning experience.

This work will inform our planning of space into the near future, and our engagement with the Campus Masterplan will ensure we can contribute to planning a response to student need for study space in the future.

At the same time we need to ensure that our current spaces are fully inclusive, fit for purpose and are of a high quality so refreshing spaces also needs to be a priority.

Increasingly we are offering services remotely, including access to a wealth of electronic resources and support for customers 24/7, 365. With this steadily growing trend, we need to ensure that students, academics and researchers are able to maximise their use of these services and materials, and that access is simple and intuitive. We are particularly mindful of the likely increase in online learning, an added driver for work in this area.

Space: aims

- Provide inspirational, high quality, well maintained and fit for purpose library space
- Provide an equivalence of experience between the physical and virtual
- Utilise user led design

Space: objectives

- Physical space
 - Creation of additional study spaces within the existing library spaces
 - Engaging with the development of cutting edge learning spaces on campus working with the Learning Spaces Working Group and contributing to the development of the Campus Masterplan
 - Reinvigorating existing learning space in the library through use of new furniture solutions and technology

- Renewing the Kings Manor Library
- Virtual space
 - Continue to explore services which can be delivered virtually to enable delivery 24/7 365 and direct to desktop
 - Understand the needs of participants in online learning programmes, and deliver bespoke services to support these individuals
 - Improve existing systems and online services to ensure access to information, services and resources

Scholarship

Scholarship: Introduction

The scholarly communications environment remains volatile with uncertainty around the precise nature of academic publishing in the future.

The shift to open access to material is proving slow and expensive with publishers keen to ensure a strong revenue stream moving forward leading to robust and potentially game changing negotiations around price increases and the nature of negotiated agreements. In the UK the mandated move to open outputs and open data from research councils and government continues, and the complexities and issues around this shift are still emerging.

The need to curate and preserve digital outlined in the last strategy is still strong, but solutions remain immature with questions around the extent to which such activity should take place. The digital also offers up new research opportunities, but nationally libraries have yet to form a coherent support offer for digital scholarship.

Scholarship: aims

- Build a sustainable digital scholarship infrastructure and support this growing area
- Open up our collections to make new research possible
- Explore new forms of output to reflect the changing nature of scholarly communication
- Encourage York authors to engage with open access publishing
- Understand differences between faculty needs for information and collections to support research and teaching

Scholarship: objectives

- Working in the national arena
 - Work with national bodies such as RLUK, SCONUL and Jisc collections on the evolution of scholarly communication
 - Continue to work with White Rose University Libraries on collaborative collection management
 - Contribute to the National Bibliographic Knowledgebase
 - Promote the availability of White Rose University Press for York authors seeking an open access publishing route
- Developing our collections
 - Continue to exploit new content purchasing strategies to improve access

- Work with colleagues across all Faculties, but particularly in the Arts and Humanities, to understand requirements for content, regardless of format and to build suitable collections
- Exploiting our collections
 - Embed use of archive and rare books collections in taught programmes
 - Develop robust mechanisms for the collection, promotion and preservation of university content supporting open access and open research
 - Identify and refine discovery tools to enable unmediated and intuitive access to services and resources
- Digital scholarship
 - Engage with academic departments to develop suitable services to support digital scholarship through partnerships between Library, Archives, IT and other relevant professional services

Skills

Skills: Introduction

The external environment is becoming more digital and graduates entering the employment market will be expected to have the skills necessary to flourish in the digital workplace, and engage with the digital economy.

To ensure our students are equipped with the necessary skills, all our staff must be capable of delivering business, teaching and research in the digital world, utilising technology to best advantage and efficiency.

It is these challenges which our skills theme seeks to address.

Skills: aims

- Become a digital institution - where digital is not an add on but an integral part of our operations
- Equip **all** staff with the skills needed to undertake their roles (and for life more generally)
- Help to ensure York recruit staff with the right digital skills
- Support teaching staff to use/think about digital when planning their teaching
- Support research staff to make new and innovative use of technology
- Ensure students have appropriate digital skills to undertake their study and prepare for employment

Skills: objectives

- Digital skills for the student community
 - Embedding digital skills within taught programmes
 - Continue to develop Digital Wednesdays as a delivery mechanism for generic skills development
 - In partnership with other professional services harmonise the online skills guides to support areas beyond digital skills
 - Work with YGRS and GSA to improve the experience of PGR students

- Digital skills for staff
 - Embed digital in the PGCap programme
 - Work in partnership with Learning and Development to embed digital leadership within the management and leadership programmes delivered at the University of York
 - Deliver support for "training pathways" to allow bespoke skills development for individuals
 - Identify the necessary skills involved in digital scholarship and provide the materials and support necessary to develop this area for students and staff

Review

There will be a report to ISG each six months on progress with the strategy. Work and projects forming the work plan associated with the strategy will be overseen by the Library & Archives Senior Managers Meeting and Library & Archives Managers meeting.

Liz Waller March 2018

Library & Archives Strategy 2018-2020

Vision

Working in partnership with all members of the University the Library & Archives will enable the University to deliver its mission, by providing access to world-class collections, facilities and services.

Key themes

Space

Scholarship

Skills

Objectives

Physical space	Working in the national arena	Digital skills for the student community
Creation of additional study spaces within the existing library spaces	Work with national bodies such as RLUK, SCONUL and Jisc collections on the evolution of scholarly communication	Embed digital skills within taught programmes
Engaging with the development of cutting edge learning spaces on campus working with the Learning Spaces Working Group and contributing to the development of the Campus Masterplan	Continue to work with White Rose University Libraries on collaborative collection management	Continue to develop Digital Wednesdays as a delivery mechanism for generic skills development
Reinvigorating existing learning space in the library through use of new furniture solutions and technology	Contribute to the National Bibliographic Knowledgebase	In partnership with other professional services harmonise the online skills guide to support areas beyond digital skills
Renewing the Kings Manor Library	Promote the availability of White Rose University Press for York authors seeking an open access publishing route	Work with YGRS and GSA to improve the experience of PGR students
Virtual space	Developing our collections	Digital skills for staff
Continue to explore services which can be delivered virtually to enable delivery 24/7 365 and direct to desktop	Continue to exploit new content purchasing strategies to improve access	Embed digital in the PGCap programme
Understand the needs of participants in online learning programmes, and deliver bespoke services to support these individuals	Work with colleagues across all Faculties, but particularly in the Arts and Humanities, to understand requirements for content, regardless of format	Work in partnership with Learning and Development to embed digital leadership within the management and leadership programmes delivered at the University of York
Improve existing systems and online services to ensure access to information, services and resources		Deliver support for "training pathways" to allow bespoke skills development for individuals

	Exploiting our collections	Identify the necessary skills involved in digital scholarship and provide the materials and support necessary to develop this area for students and staff
	Embed use of archive and rare books collections in taught programmes	
	Develop robust mechanisms for the collection, promotion and preservation of university content supporting open access and open research	
	Identify and refining discovery tools to enable unmediated and intuitive access to services and resources	
	Digital scholarship	
	Engage with academic departments to develop suitable services to support digital scholarship through partnerships between Library, Archives, IT and other relevant professional services	

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