Strategic Options Analysis – Version 1.0 – 11/17/2011

FY13 Planning Task Force – November 2011

This planning document focuses on **the future of the ULS as a digital library**. The ULS digital library extends beyond our existing Digital Research Library (DRL) and includes activities related to licensed, digitized, and born digital collections and the provision of intellectual access to them; services of the digital library including web services and reference in various environments; the ULS scholarly publishing program; systems and infrastructure; assessment of users, usage, and usability; marketing and communications; and more.

The proposed strategic actions listed below represent the ideal. No attempt has been made at this point to prioritize the actions or assess feasibility from a staffing or resource allocation perspective. These steps will follow.

Strategic Outcome	Program statement – Why are we doing this?	What we have to do to be successful	Proposed Strategic Actions
Jeff and Robin Support high-quality undergraduate programs and superior graduate programs	Improve teaching, research and learning through the provision of state-of-the-art supporting collections, services, facilities, applications, and systems Deliver innovation (enhance access, better integration/engagement with faculty, departments, students)	Realign and renovate discoverability and access through improved systems, apps, and infrastructure	Convene a task force of key stakeholders to review alternative methods for providing remote access to ULS licensed resources, make recommendations to senior staff, create implementation plan, and implement solution (Q1-4 FY13)
		Understand current needs, expectations, behaviors, and preferences of target user communities Realign and introduce adapted or new ULS services that meet requirements of target user communities Realign and renovate discoverability and	Convene a cross-departmental collaborative to draft high-level user interface requirements to be used for re-design of ULS digital library incorporating user input and feedback. Implement redesign based on requirements document (Q1-4 FY13)

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		access through improved systems, apps, and infrastructure	
		Embed collections and services at the point of need Increase awareness, perceived value, relevance, and usage of ULS collections	Create integrated processes by which end-users can recommend content free of rights issues for digitization (Q1-2 FY13) Increase percentage of electronic content available through patron driven acquisitions, as informed by FY11 pilot (by Q4 FY13)
		Increase awareness, perceived value, relevance, and usage of ULS collections Realign and renovate discoverability and access through improved systems, apps, and infrastructure	Develop and implement pilot program to make available ULS created digital content for re-use and/or remixing (Q3-4 FY13)
		Realign and introduce adapted or new ULS services that meet requirements of target user communities Embed collections and services at the point of need	Convene task force with key ULS and CIDDE stakeholders with goal of greater integration of ULS information literacy expertise and ULS resources into CourseWeb (Q1-2 FY13)

Strategic Outcome	Program statement – Why are we doing this?	What we have to do to be successful	Proposed Strategic Actions
		Improve communications and branding with target communities, both through individual and organizational actions	Create and implement external communications plans. Identify responsibilities and mechanisms for consistently distributing targeted, relevant information to ULS stakeholders (Q1-Q4 FY13)
Tim and Ed Support the collaborative advancement of knowledge and creative endeavor	Lead in transforming patterns of scholarly communication Support researchers in the production and sharing of new knowledge Select, organize, optimize access to, preserve and maintain the cultural record, with emphasis on unique collections of special benefit to the university and the citizens of Pennsylvania Seize the opportunity to increase the global visibility, quality, impact, and open availability of the advancements in knowledge	Increase internal awareness of current issues in scholarly communications among ULS colleagues	Design and introduce professional development programs for ULS colleagues to inform external communications on Open Access and Scholarly Communications (Q1 FY13)
		Gain an understanding of the needs of research faculty and other producers of scholarly knowledge so we can better respond to their needs	Directly engage faculty and students on scholarly communications issues through at least 10 group events including onsite visits with individual schools and academic departments (Q1-Q4 FY13) {placeholder for E-Science Institute project: Assess the role of the ULS in E-Science initiatives at Pitt, for example, by providing data curation and other support services}

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		Articulate a persuasive vision to help knowledge producers become active partners in transforming scholarly communications	Advance open access policy with the University administration and other key influencers at Pitt, resulting in adoption of Open Access Policy by at least three Schools or Responsibility Centers. (Q1-Q2 FY13)
		Raise awareness, teach and train scholars in current issues in scholarly communications and best practices in electronic publishing of scholarly research	Promote awareness of Open Access issues through Open Access Web site (openaccess.pitt.edu) and other programmatic activities during Open Access Week October 22-28, 2012 (Q1-Q2 FY13) Develop and implement improved Web presence and other documentation for the University community on key scholarly communications issues including copyright, Fair Use, Open Access licensing, author rights and responsibilities, and impact assessment (Q1-Q4 FY13)
		Support growth of Open Access publishing while maintaining support for academic integrity and quality of scholarly research	Continue to expand the ULS e-journal publishing program with emphasis on incentivizing Open Access; add at least 5 new titles (Q1-Q4 FY13)
		Develop and master tools and systems to support more innovative, efficient and	Comply with terms of development partnership

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		cost-effective knowledge production	agreement with the Public Knowledge Project (PKP) to enhance OJS and other publishing software in ways that benefit the U. of Pittsburgh and our publishing partners (Q1-Q4 FY13)
		Continued development of innovative publishing services and trusted repositories for the research output of the University

Provide the technology infrastructure and expertise to support the creation of and access to new digital collections | Develop efficient processes for ingesting University research into D-Scholarship@Pitt on a large scale; add at least 3,000 new records (by Q4 FY13)

Transition use of the Fedora Commons infrastructure from pilot to operational status; create internal communication and knowledge-sharing plans for Fedora-based service and stewardship capabilities. (Q1-4 FY13) |
| | | Ensure responsible stewardship of our digital assets | Develop policies governing curation of digital objects (by Q4 FY13)

Conduct strategic planning analysis for accessioning, appraising, processing, preserving and accessing electronic records acquired by ULS Archives & Special Collections (Q1-Q4 FY13) |

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		Select ULS archival and manuscript collections free of rights issues for digitization to support primary University disciplines, the citizens of Pennsylvania, and the broader cultural record	Continue digitization of most significant historic cultural records (Q1-Q4 FY13) Collaborate with ULS liaison librarians to engage faculty in the selection of appropriate content to be digitized (Q2-Q4 FY13)
Tim and Ed Expand international focus and activities/ Support and engage with diverse populations of students and faculty	Advance scholarship worldwide	Build collaborative partnerships with faculty and research communities around the world to improve the production and sharing of scholarly research	Continue to work with publishing partners worldwide, including partners in Turkey, India, Indonesia, Brazil, Peru, Bolivia, UK, France, and others (Q1-Q4 FY13)
Aaron and Karen Ensure organizational efficiency, effectiveness and responsiveness to university communities	Increase the communication of ideas and collaborative action between ULS staff across departments and with campus partners Develop an organizational culture that emphasizes user-centered, data-driven decision making and continuous improvement Promote and facilitate a professional work environment that is	Reduce organizational fragmentation around digital library processes and resources Develop the necessary organizational structures and cross-functional teams to ensure: • Effective internal and external communications • An inclusive and ongoing strategic planning process • Strategic and prioritized allocation of ULS resources	Establish and charge a cross-unit ULS Digital Library Collaborative to produce and carry out an action plan for: • Identifying responsibilities and mechanisms for consistently distributing internal and external communications • Advancing collaboration with campus partners (Q1-Q2 FY13) Review the organizational structure of the ULS digital library with a focus on efficiency and

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	challenging, satisfying, and rewarding for staff at all levels. Increase service efficiency and cost effectiveness.		support of strategic priorities and make recommendations (Q4 FY13)
		Introduce an annual cycle of formal and informal user, usage, and usability studies to inform user-centered design for undergraduates, graduate students, researchers and faculty	Identify, select, and conduct relevant user, usage, and usability studies (Q1-Q2 FY13) Informed by these studies, review current ULS digital library services and partnerships and develop, in writing, a prioritized plan and roadmap for the next 2-3 years. (Q1-Q3 FY13)
		Regularly assess and update staff competencies Provide targeted resources to support technical training and professional development needs	Create and implement an assessment tool to determine staff competencies and gaps, and to support the alignment of skills with organizational priorities (Q1-Q2 FY 13) Create and implement a targeted professional development program for staff, informed by assessment, to strengthen prioritized skills (Q3-Q4 FY 13)

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		Identify and capitalize on partnerships and collaborations outside the university that can increase our organizational efficiency and effectiveness	Conduct a review of ULS partnerships with digital library implications • Identify a ULS liaison for each partnership; duties include regular reporting back to ULS • Cross-check partnership benefits and services against ULS digital library strategic priorities; identify opportunities and develop action plans (Q1 FY13)
		Create and implement a project management framework to ensure strategic focus; successful and on-time outcomes; effective marketing, outreach and communications; and the use of assessment data to underpin digital library initiatives	Design, document, implement, and train selected staff in a project management framework (Q1-Q3 FY13) Add current and ongoing user assessment and feedback data to the Assessment Sharepoint site (Q1-Q4 FY13)