

QUEEN'S UNIVERSITY BELFAST

AFBI Library Contract

AFBI Library Strategic Plan 2013 - 2018

1. Introduction

The strategic plan for the AFBI Library provides the framework within which library and information services to employees of the Agri-Food and Biosciences Institute (AFBI) will be delivered over the next five years. The AFBI Library will support the Institute in achieving its goals as set out in its 4-year corporate strategy and any subsequent strategic document. These goals are driven by the definition of AFBI's function as set out in *The Agriculture (Northern Ireland) Order 2004*. In summary this is to undertake research and development work and advice in the areas of agriculture, animal health and welfare, food, fisheries, forestry, the natural environment and rural development and enterprise. The library contract was awarded to Queen's University Library with a commencement date of April 2013. The contract was awarded for an initial period of five years with one extension period of a further five years hence the timespan of the Library strategic plan.

The AFBI corporate strategy 2011/12-2014/15 states that AFBI's mission is "Supporting government policy and industry innovation across the agri-food and rural sector through the provision of high quality scientific services, advice and expertise". The strategy recognises that effective research and development underpins successful organisation performance by including "Building AFBI's Knowledge Base" as a strategic theme with "Enhanced reputation and profile as leaders in the delivery of world-class R&D and other scientific services" as a key impact indicator. The AFBI Library Strategic Plan reflects the need to support all AFBI staff in achieving its objectives by providing high quality, accessible resources in a timely manner with the services and training required to ensure maximum exploitation of these resources. An awareness of changing priorities in strategically important core areas of science, user expectations, the role of technology and the need to achieve value for money underpin the plan.

The plan has evolved through a process of consultation and information gathering involving regular meetings of the AFBI Library Action Group, the AFBI Library Committee and user feedback via the AFBI Library Online (ALO) website, user surveys and through a series of focused discussions with key personnel in the 14 AFBI Divisions.

The plan is responsive to change and will be reviewed and updated regularly. A list of projects relating to the implementation of the plan is provided in Appendix A.

2. Context and strategic aims

The AFBI Library strategy aims to ensure the implementation and enhancement of the services defined by the contract. In particular the role of the Library is to contribute to the work and core values of AFBI by helping staff to make effective use of the knowledge and information base contained within, and made available through, the AFBI Library in partnership with the Queen's University Library. In this way the Library will support the stated aims of AFBI to "invest in the generation and acquisition of knowledge and technology" and to be "innovative and forward looking". Our goal is to provide access to the highest quality information and resources by delivering and promoting excellent library services to meet the needs of all the AFBI Library members on all AFBI sites.

The period covered by the plan is a challenging one for libraries. The demand for fast, flexible and reliable access to a wide range of resources is occurring at a time when financial pressures are severe. AFBI's delivery of innovation and scientific support to the agri-food sector needs to be based on the best and most up-to-date evidence. Library staff have an

important role to play in evaluating, selecting and managing resources and ensuring that users find it easy to access and use them. The Library will depend increasingly on electronic resources and the case for maintaining print-based collections will have to be explicitly justified. However, the Library will continue to offer a hybrid library service during the period under review and, while expanding electronic provision, will safeguard those print collections that are still an important resource for some users.

Library resources represent a major investment by AFBI and it is vital that users are aware of the services on offer and are provided with the guidance and training required to exploit resources and services to the full. Promotion and training are key elements of the strategic plan. The AFBI Library is a multi-site service serving a diverse user base and training, advice and library guides need to reflect this both in content and delivery. The previous library plan focused, successfully, on moving from an essentially print-based collection to a predominantly e-based collection. This plan will focus on delivering training and advice both in person and online to ensure full benefit is derived for the organisation from all resources.

The Library continues to face the challenge of balancing the physical with the virtual library. An integrated approach will be taken by providing ready access to both printed and electronic resources and by ensuring both on-line and face-to-face support and services are offered. The library needs to be responsive to users' needs and provide self-service and self-help options as well as the more traditional services still required by many. This will have an impact on the roles and professional competencies of library staff as well as on the way libraries are used and information is handled. Library staff development will continue to be a key feature of the service delivered.

There are undoubtedly challenges facing the Library in the next few years but there are opportunities also. The partnership between AFBI and Queen's University offers an excellent opportunity to procure, promote and provide access to a wide range of services and resources which underpin excellence in delivering scientific work and providing high quality advice and expertise to the Department of Agriculture and Rural development (DARD) and others. An overarching consideration will continue to be the need to keep in step with the requirements of all our users and to ensure that services and their delivery are constantly kept under review to ensure appropriate service orientation.

Projects contributing to the implementation of the strategic plan for the AFBI Library can be grouped under the following headings:

- procurement and management of resources
- delivery of resources and services .
- service development
- promotion and marketing of resources and services
- support and training to ensure maximum exploitation of resources and services
- library staff development
- service monitoring/performance indicators
- optimisation of library environments
- risk management

3. Goals and action plan

3.1 *Procurement and management of resources*

AFBI library members are located on a number of sites throughout Northern Ireland. It makes sense, therefore, to deliver as much material electronically via the AFBI Library Online website as possible. Library staff will review journals still held in print and electronically or in print only with a view to making them e-only if the cost (including VAT) permits. As more material is moved to e-access or e with print, existing policies will be reviewed with a view to reducing binding where possible and also print holdings where

secure electronic access is available. Although it is widely accepted that journals should be provided electronically, most books bought for the AFBI Library are still purchased in print. Over the next five years the Library will increase the number of e-books bought both individually and as package deals and will look at new methods of procurement such as Patron Driven Acquisition (PDA).

Databases are expensive resources but key to the retrieval of relevant and up-to-date material. Databases currently subscribed to will be evaluated and pilots run to assess user feedback if new services or resources become available.

The need to evaluate resources to ensure value for money is crucial to ensure the library service is fit for purpose. In collaboration with the AFBI Library Committee, journal holdings will be regularly reviewed to ensure the core scientific areas are supported and changes in the organisations priorities are reflected. An appropriate balance of electronic and print formats will be maintained.

Resource management projects are listed in Appendix A 3.1.1 - 3.1.3.

3.2 Delivery of resources and services

The AFBI Library will continue to respond to the challenge of providing resources and services to staff on all sites by constantly reviewing and improving the *AFBI Library Online* website and streamlining access to full text content. *AFBI Library Online* is the primary gateway to electronic resources for AFBI staff. In addition to providing access to electronic journals, books and databases, it provides online requesting for articles not available in full text, online renewals and library account management, details of books and journals via the online library catalogue, and guides and information about the full range of library services including training and advice. Library staff will also investigate the role of mobile technologies and social media to enhance the delivery of services.

Developments in ICT will enable us to offer new and better services with more library services able to be delivered to the desktop or via mobile technologies. Incremental service development facilitated by the latest technological developments remains central to our ethos. Close collaboration with AFBI IT staff and with IT Assist is critical to fast reliable access to resources and services via *AFBI Library Online*. Improved access to information will be provided via a revised A-Z list of journals and the linking to full text material via an improved link resolver. Consideration will also be given to implementing a resources discovery tool if funding permits. The Library has also recently moved to Shibboleth authentication to enable users to get easy access to material for which subscriptions have been set up and this will be monitored on a regular basis. A single sign-on to all AFBI facilities including library resources and services would be ideal, although difficult to achieve, and this will be investigated. Other projects to support users and increase uptake in the use of library resources and services will include the promotion of alerting services, provision of context-specific help and guidance online and in print, highlighting the online book proposal service and looking afresh at the service to deliver full text interlibrary loan material direct to staff via Secure Electronic delivery (SED).

In order to make best use of resources a review of the stock held in all the AFBI branch libraries will be carried out. It is envisaged that libraries with small print collections and no staff on site to manage them will be provided with a dedicated AFBI Library Online pc, an up-to-date reference collection and a full range of literature guides and help sheets. Material will be lent to staff on these sites from the central collections ensuring that accurate records are kept and material is not in effect lost by being off the library shelves but not recorded as being on loan. A more detailed review of library spaces will be considered under 3.8 below.

Projects relating to the delivery of resources and services are listed in Appendix A 3.2.1 – 3.2.3.

3.3 Service development

The main AFBI collections at Newforge and Stormont were RFID (radio-frequency identification) tagged at the end of the last library contract and the potential to improve stock control using this technology should now be explored. New material and any items relocated to the central collections will also be RFID tagged.

In 2011 the library invested in a new Library Management System (LMS) which included a new circulation system (Millennium), catalogue and resource discovery tool, PathfinderPro. The benefits of future upgrades to the LMS should be evaluated and implemented if appropriate. Sierra, the upgrade to Millennium, will offer a highly flexible open development environment and software interface which will enable the Library to work with third-party vendors to build and integrate interoperable data applications within a web framework. Other specific plans include setting up a fully integrated Electronic Resources Management system which will facilitate management of licenses and monitoring of detailed usage statistics to ensure that resource provision matches user needs and delivers value for money.

Further enhancements that will be investigated during the period of the plan will include a review of current inter-library loan (ILL) procedures and more efficient collaboration with the British Library (BL) as well as the impact of open access developments, a review of circulation notifications and better use of mobile devices to communicate with library members.

Service enhancement projects are listed in Appendix A 3.3.1 – 3.3.5

3.4 Promotion and marketing of resources and services

It is important to ensure that expensive resources are exploited to the full and that all AFBI staff are aware of the library services available to them through the AFBI/QUB contract. All staff should be made aware at induction of the library facilities and the services available to them. The Library will be promoted by increased use of the AFBI intranet as well as via the email library members' list and news items on AFBI Library Online. Library staff will work with other AFBI units such as Learning and Development to promote staff support through the physical and virtual library service.

Services should be user-focused and responsive to changing needs. The simplest way to find out what users want is to ask them. A brief user survey should be carried out to identify any requirements or problem areas. Further feedback will be obtained through meetings with Branch Heads and Branch staff. A planned programme of training will be established to increase awareness of available resources and services.

The Library has a particular role to play in supporting PhD students. Library staff will engage with any forum set up and ensure that there is postgraduate student representation on the library committee.

Projects relating to the promotion and marketing of resources and services are listed in Appendix A 3.4.1 – 3.4.2.

3.5 Support and training to exploit resources

The importance of support from highly skilled and professional library staff and a carefully planned and timetabled training programme cannot be overestimated. It is essential that AFBI staff are provided with an appropriate level of support and guidance on the use of the Library and its resources. The training programme should include a general introduction to the service provided via *AFBI Library Online* and the network of physical libraries, specialist information skills training in different subject areas and at both basic and advanced levels, bibliographic and reference management training using Endnote, and bibliometrics and

citation analysis sessions. Other training areas such as copyright and open access will be considered.

As well as formal training sessions, the professional library staff have a key role to play in supporting the work of AFBI staff on a one-to-one basis. The availability of help with and advice on all aspects of information gathering, organisation and publication will be promoted.

Library staff will review the format and content of training to ensure it is fit for purpose and responds to feedback on the length and timing of sessions.

Guides in print and electronic format should be up-to-date, context specific where possible and readily available on all sites.

The project relating to support and training is listed in Appendix A 3.5.1 – 3.5.3.

3.6 Staff development

Changes in the way library services are delivered are having an impact on the roles and competencies of staff. In the light of new service demands, training should be provided to ensure staff are equipped with the necessary skills to provide improved services. The AFBI Library staff should attend regular updating and exchange of experience sessions with colleagues and be offered the opportunity to develop new skills. Such opportunities will be identified as part of the annual staff appraisal exercise.

The Queen's University Library staff, and this includes those members of staff based in the AFBI Library, will pursue Customer Service Excellence accreditation for library services during the period covered by the plan.

The projects relating to staff development are listed in Appendix A 3.6.1 – 3.6.2.

3.7 Service monitoring

It is important to monitor trends if services are to be as effective as possible. The current statistics gathering should be reviewed with a view to identifying gaps and streamlining procedures. Trends should be identified and information gathered on the uptake of services and the use made of resources. The use of the LMS *Create Lists* module to run pre-defined searches to extract useful management information should be promoted and training provided.

Work towards enhancing usage statistics for electronic resources will be carried out using such services as Raptor, JUSP and EBSCO ideally providing portal access to usage information. The import of e-resource statistics and mechanisms for improving personalisation options for Library users will also be investigated.

The project relating to service monitoring is listed in Appendix A 3.7.1.

3.8 Optimisation of library environment

The AFBI Library operates across a number of sites and there are currently a number of unanswered questions about future developments which will impact on library planning in the period covered by this plan. Once decisions about a new building at Stormont and a possible relocation of staff on the Newforge site have been taken, serious consideration at an early stage should be given to the future location and design of the library. An options appraisal should be carried out to ascertain the right place, or places, for the Library and the kind of spaces required. Rather than replacing like with like, the opportunity to plan a library for the 21st century should not be missed if AFBI is to fulfil its goal of sustaining and developing its knowledge base and position as a leader in the delivery of innovation and scientific support to the agri-food sector.

Regardless of the outcome of wider discussions on AFBI planning, the various existing libraries will be reviewed with a view to providing the kind of facilities required for the hybrid library in the digital age. Improvements in layout, fittings and furniture will be considered for some of the library spaces which are now quite tired and dated. Ideally library areas should be refurbished if necessary to provide conducive spaces with ample power points, wireless networking and a variety of seating and work places to enable staff to carry out research and library-related work away from their office when necessary.

The projects relating to the library environment are listed in Appendix A 3.8.1 – 3.8.2.

3.9 Risk management

In developing the AFBI Library Strategic Plan consideration has been given to areas of potential risk in delivering the contract. The main area of concern would be a sudden significant change in AFBI's level of activity, either a large increase which would result in additional costs to AFBI as QUB Library could not simply absorb the additional activity or a significant decline in AFBI's activity. This risk is seen as minimal and the review and renewal arrangements under the contract should be sufficient to mitigate it.

The cost of books and journals increases at a rate higher than the RPI. If inflation is particularly high and/or there is adverse currency fluctuation, the budget would need to be increased appropriately or subscriptions would be subject to cancellation. A further, although lesser, risk would be if an unhelpful attitude were to be adopted by publishers towards extending QUB licences to AFBI for access to electronic resources. The annual journal review exercise carried out by library staff in conjunction with the AFBI Library Committee should ensure that budgetary pressures are addressed.

AFBI is currently examining the scope for relocation of some business functions from AFBI Newforge to other AFBI sites to minimise the footprint required at a future relocation site. There is also a possibility of engaging a specialist to review AFBI's accommodation requirements. The implications of such a move could be critical to the library's business and the AFBI Librarian should be involved in discussions about location and the design brief at an early stage. Proximity to as many scientific staff as possible is key to the library service as are the physical and electronic links with the Queen's University Library. The need for an options appraisal once key decisions at Senior Management level are taken is noted in 3.8.

The project relating to risk management is listed in Appendix A 3.9.

APPENDIX A: Projects

3.1 Procurement and management of resources

3.1.1 Project: review print and electronic subscriptions

Milestones	Start date	End date
Update journal database	August 2013	October 2013
Obtain prices for e-only access to replace print and print+e	November 2013	February 2014
Populate database with price information	March 2014	March 2014
Review journal holdings with AFBI Library Committee	May 2014	June 2014
Implement subscription changes	August 2014	September 2014

3.1.2 Project: explore best value options for databases and e-books

Milestones	Start date	End date
Investigate available e-book packages and databases	January 2014	February 2014
Run pilots of new resources	March 2014	April 2014
Record feedback	May 2014	May 2014
Negotiate value-for-money licences	June 2014	July 2014
Consider PDA options	2015	2015

3.1.3 Project: review binding

Milestones	Start date	End date
Check list of titles being bound	January 2014	February 2014
Check if secure access to back issues	February 2014	March 2014
Cease binding print copies if available securely in e-format	June 2014	June 2014
Continually review	On going	On going

3.2 Delivery of resources and services

3.2.1 Project: improve AFBI Library Online functionality

Milestones	Start date	End date
Review existing content	September 2013	December 2013
Update guides	September 2013	December 2013
Promote A-Z list, book proposal and ILL forms/SED	January 2014	January 2014
Improve visibility through integration with other AFBI websites	January 2014	March 2014
Investigate use of mobile technology and social media	2015	2015
Soft launch	January 2014	January 2014

3.2.2 Project: improve access to e-resources

Milestones	Start date	End date
Improve methods of authentication via Shibboleth	September 2013	October 2013
Implement EBSCO link resolver	July 2013	October 2013
Populate EBSCO Knowledgebase	August 2013	December 2013
Investigate implementation of a resource discovery tool	April 2014	August 2014
Promote use of a range of alerting services	January 2014	On going
Investigate single sign-on	July 2015	December 2015

3.2.3 Project: review branch libraries stock

Milestones	Start date	End date
Carry out review of stock in Hillsborough and Loughgall	October 2013	March 2014
Bring forward proposals	April/May 2014	
Implement ALO hubs where appropriate	September 2014	March 2015
Promote new service	March 2015	
Consider provision on other outlier sites such as Omagh	April 2015	

3.3 Service development

3.3.1 Project: review stock management using RFID

Milestones	Start date	End date
Update stock management policy	January 2014	
Investigate potential of DLA & RFID	January 2014	
Set up a timetable for stock checks	January 2014	

3.3.2 Project: implement LMS upgrade

Milestones	Start date	End date
Contribute to USAG discussions on Sierra	January 2014	
Investigate application of Sierra to AFBI procedures	January 2014	April 2014
Implement Sierra		August 2014
Communicate changes to users	September 2014	

3.3.3 Project: review ILL procedures

Milestones	Start date	End date
Review BL procedures	2015	
Consider alternative suppliers (pay-per-view)	2015	
Communicate changes to users	2015	
Monitor impact of open access	2015	

3.3.4 Project: review all notifications

Milestones	Start date	End date
Investigate possibility of improving content and delivery of notifications to AFBI users	August 2014	

3.3.5 Project: investigate potential of new technologies for customer service

Milestones	Start date	End date
Promote online renewals	2014	
Investigate selection of collection point	2014	
Look at potential for mobile devices	2015	

3.4 Promotion and marketing of resources and services

3.4.1 Project: raise profile of AFBI Library Service and AFBI Library Online

Milestones	Start date	End date
Set up meetings with Branch Heads	October 2013	
Set up brief sessions to deliver to Branch staff meetings	October 2013	January 2014
Embed ALO training in induction & training programmes	On going	
Increase use of AFBI intranet for promoting services and resources	April 2014	On going
Recruit PhD student representatives to the library committee	May 2014	On going

3.4.2 Project: carry out user survey

Milestones	Start date	End date
Design brief survey	January 2014	
Implement survey	February 2014	
Analyse and publicise results of survey with recommendations	April 2014	

3.5 Support and training to exploit resources

3.5.1 Project: prepare training schedule

Milestones	Start date	End date
Devise annual timetable	October 2013	
Set up induction training for new staff	September 2013	
Initial Endnote training	August 2013	
Roll out basic and advanced Endnote training	October 2013	On going
Provide basic and advanced information skills training	November 2013	On going
Bibliometric/citation analysis/copyright/open access training	2015	
Review timing and format of training sessions	January 2015	March 2015

3.5.2 Project: promote library advice services

Milestones	Start date	End date
Promote services via website and mailing list	2014	
Hold information surgeries on various topics: copyright, licenses, open access, publishing etc	September 2014	On going
Set up FAQs	March 2014	On going

3.5.3 Project: update support material

Milestones	Start date	End date
Update AFBI Library guide	September 2013	December 2013
Update print guides	September 2013	December 2013
Update e-guides	November 2013	January 2014
Develop on-line tutorials	2015	2015

3.6 Staff development

3.6.1 Project: staff training programme

Milestones	Start date	End date
Establish training needs programme for library staff via appraisal	September 2013	November 2013
Endnote training for library staff	August 2013	
Attend QUB staff updates and pc training courses	September 2013	

3.6.2 Project: pursue Customer Service Excellence accreditation

Milestones	Start date	End date
Contribute to CSE accreditation programme	2013	2014
Lead module on delivery of services	2013	2014

3.7 Service monitoring

3.7.1 Project: improve range of management information data

Milestones	Start date	End date
Review content and gathering of statistical information	August 2013	January 2014
Decide on a set of metrics	2013	2014
Promote use of Create Lists and set searches	On going	
Provide training to all library staff	On going	

3.8 Optimisation of library environment

3.8.1 Project: review all AFBI Library facilities and upgrade

Milestones	Start date	End date
Prepare outline brief for library spaces	January 2014	
Review existing facilities at Hillsborough and Loughgall	January 2014	April 2014
Review library space at Stormont in the light of possible new facility	2014	
Consider improving layout, furniture & signage on all sites	2014	
Extend provision of power sockets on all sites	2014	
Investigate possibility of wireless access on main sites	2015	
Consider implementation of ALO hubs	2014/15	

3.8.2 Project: carry out options appraisal for new central library facility

Milestones	Start date	End date
Prepare options appraisal in event of move from Newforge to assess alternative sites and QUB Library	2014	
Write design brief (see 3.8.1 above)	2014	

3.9 Risk management

3.9.1 Project: revise the Risk Register

Milestones	Start date	End date
Revise and monitor Risk Register	January 2014	
Include access issues, price increases, activity and relocation		

APPENDIX B – Project Timeline

AFBI Library Strategic Plan 2013/14 – 2017/18

2013/2014

Raise profile of AFBI Library Service and *AFBI Library Online*
Review print v electronic subscriptions
Review binding
Update support material
Prepare training schedule
Explore best value options for databases and e-books
Improve access to e-resources
Set up staff training programme
Review branch libraries
Improve range of management information data
Initiate Customer Service Excellence accreditation

2014/2015

Improve AFBI Library Online functionality
Review all journal subscriptions
Review binding
Review stock management using RFID
Implement LMS upgrade
Review all AFBI Library facilities and upgrade
Attain Customer Service Excellence accreditation
Promote library advice services
Review notifications
Revise the Risk Register
Carry out options appraisal for new central library facility

2015/2016

Increase % of e-books purchased
Review inter-library loan procedures
Carry out annual journal review
Investigate potential of new technologies for customer service
Plan new library spaces?

2016/2017

Carry out annual journal review
Review strategic plan against targets
Plan new library spaces?

2017/2018

Review stock
Prepare strategic plan for next phase of the contract