TRENT UNIVERSITY LIBRARY & ARCHIVES

STRATEGIC PLAN

2014-2017

Transforming the Library through Collaboration and Innovation
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Library Vision in 2017

The Trent University Library in 2017 will be the Trent community's central information and knowledge hub, combining both physical and virtual collaborative learning spaces, information access points, and learning and research support services in a barrier-free environment.

The Library foresees developments that combine adaptive and innovative approaches to the delivery of library and archival services:

- The physical and virtual spaces will be flexible in how they are designed and used.
- Learning support will facilitate information literacy and critical enquiry, as the core competencies for all students and staff.
- Personalized learning-support programs will be delivered using online learning technologies, will utilize preferred modes of teaching.
- The Library will preserve and provide access to the local, regional, national and global resources in its collections.
- The Library will manage both digital and print repositories of scholarly output from Trent University.
- Funding for the Library’s operation and growth will be multi-year, sustainable and aligned with that of comparable Ontario universities.

Trent University Library will continue to offer relevant traditional services, while actively promoting and implementing new digital information delivery modalities. The Library will take advantage of opportunities to play a major role in the research, teaching and administrative success of the University.

1. For the purposes of this document, Library refers to the Thomas J. Bata Library, the Oshawa Campus Library, and the Trent University Archives.
2. Information literacy is defined by the American Library Association at http://www.ala.org/acrl/standards/informationliteracycompetency#ildef
Planning Context

In 2009, the Trent University Library’s first comprehensive Strategic Plan was endorsed by the University. It identified four strategic directions for the Library and Archives:

- Building a responsive and innovative organization
- Creating a vibrant and inviting environment for research and discovery
- Enhancing Trent’s teaching, research and learning
- Expanding and harmonizing our digital and physical collections

Since the adoption of the Library’s first strategic plan, three major planning initiatives have been undertaken at Trent.

Trent University’s first integrated plan, *Toward a Sustainable Future: The First Integrated Plan for Trent University 2011-15*, set out four institutional priorities for the University:

- Commitment to Academic Excellence
- Commitment to Strategic Enrolment Management
- Commitment to Achieving Financial Stability
- Commitment to Strengthening Community Engagement

The current academic plan, *Radical Recovery: An Academic Plan for Trent University 2012-2015*, established five governing principles:

- To articulate clearly its unique identity
- To become an efficient and fiscally healthy university
- To improve its reputation and visibility
- To build a culture of respect and pride in what we do
- To improve continuously its overall quality and performance

Trent’s new *Strategic Research Plan 2014-15* provides further direction by identifying Trent’s research strengths; highlighting the need for the development of external partnerships by our research groups and centres; and encouraging collaboration with academic partners to help students widen their experience and build their credentials.

In developing this plan, the Library recognizes that both the Integrated Plan and the Academic Plan will be subject to review and renewal in 2015. *The Trent University Library Strategic Plan 2014-2017: Transforming the Library through Collaboration and Innovation* focuses on directions that respond directly to the current and anticipated planning framework at Trent. It also strives to identify longer-term trends and directions that will inform the Library’s planning for many years to come.
The Planning Environment

The Trent University Library plays a central role in the academic life of the University. It supports the scholarly, creative and professional pursuits of its students, faculty and staff, as well as members of the community at large. The Library provides comprehensive access to collections in all formats, individual and collaborative learning spaces, and expert information discovery skills training for its students and faculty. It promotes learning, and encourages the development of life-long learning skills.

Library Stakeholders

The library acknowledges and considers its’ many stakeholders in providing service and in developing our mission, vision and values. Our stakeholders include:

- students – undergraduate, graduate and visiting students;
- faculty – TUF A and CUPE I and II;
- staff – members of the Trent community;
- alumni – recent and past graduates of Trent University; and
- community members – members of the Peterborough and Oshawa communities.
Library Mission

At the intellectual crossroads of the University, the Library and Archives aims to inspire exploration, discovery and knowledge creation.

We advance teaching, learning and research by:

• providing access to scholarly information resources;
• enabling the generation, mobilization and preservation of knowledge;
• empowering users to find, evaluate and use information effectively;
• providing responsive library services and facilities to support student success and retention; and
• collaborating to create and develop the digital research infrastructure.

Library Values

The values that inform the Library’s efforts include:

• integrity and respect;
• freedom of thought and expression coupled with academic responsibility;
• innovation;
• accountability and stewardship; and
• sustainability.
Challenges

There are many challenges facing the Library; some affect academic libraries in general, while others are particular to Trent. Examples of these include:

- the need for a sustainable budget for collections and services so that the Library can provide the necessary scholarly information resources to meet the changing needs of undergraduate and graduate programs and faculty research;
- the rapid rate of technological change;
- the ongoing need to develop innovative new services to meet heightened user expectations for functionality, convenience and seamless discovery of information;
- the importance of reconfiguring physical and virtual spaces in a meaningful way to support the many ways in which today’s faculty and students pursue their activities; and
- the need to review and transform the roles of library staff and librarians to meet the changing priorities of university libraries.

Today’s academic libraries and archives continue to be providers of information resources, study spaces and learning opportunities. Their major challenge is continuing to offer important traditional services and collections while at the same time offering relevant technologically-enabled services. We still need library buildings, but library collections and services are increasingly available online, accessible throughout the campus, at home, or in the community; in fact, almost anywhere that there is an Internet connection.

Those who work in libraries have many changing roles and varied backgrounds. They are information skills teachers, electronic resource management specialists, online content managers, web designers, IT systems architects, archivists, and much more. Library personnel also provide research help, support for research data management, training in managing copyright and protecting intellectual property, etc.

The academic information environment is increasingly complex, and challenges library personnel to adapt to changing conditions and stakeholders’ expectations. Successful implementation of the tactics and strategies of this plan will rely heavily on the continuing commitment of librarians and staff to being adaptable, flexible and to uphold the vision and mission of the Trent University Library and Archives. Professional development and training in new technologies will be required as we provide improved library service and adapt to a changing landscape.
In today's environment users of academic libraries and archives have high expectations. They want:

- quality information – books, journals, databases and other sources – delivered to their chosen space, via their preferred mobile technology, and in their preferred format,
- easy, ubiquitous, virtual, round-the-clock access to resources and services,
- customizable information services to support diverse needs, and
- flexible, comfortable technology-enabled spaces for collaboration and learning.

Building on our strengths and our current initiatives, the Library will continue to position itself as the intellectual heart of the campus, and as a pivotal collaborator in the learning, research, and discovery processes of all members of the Trent University community. The Library is committed to ensuring seamless access to information resources and services, and improving the overall quality of student and faculty experiences with their Library. The Library's commitment to the provision of the highest quality services by adapting to a changing information and knowledge universe serves to underpin all future planning and initiatives.

Informed by an extensive environmental scan, and by valuable input from Library personnel and campus stakeholders, this strategic plan is the framework that articulates our goals for the next three years.

This plan identifies four strategic directions:

- Supporting teaching and learning
- Creating spaces for collaboration and learning
- Enabling research and scholarship
- Building Partnerships
STRATEGIC DIRECTIONS: SUMMARY

1. Supporting Teaching and Learning

Tactics:

• Implement advanced search and discovery tools to facilitate efficient, deep access to Trent’s collections.
• Incorporate emerging information technologies in the delivery of services.
• Expand the Information literacy of all students.
• Develop a more integrated approach to assisting students with research, writing, computing, and general learning skills.
• Support critical enquiry initiatives.
• Develop a stable funding framework to acquire and sustain collections that are responsive to teaching and learning goals and outcomes.

2. Creating Spaces for Collaboration and Learning

Tactics:

• Design and safeguard flexible, comfortable and technology-friendly learning spaces for undergraduate and graduate students.
• Respect Trent’s design legacy in the creation and development of any new learning and study spaces in the Bata Library.
• Consolidate existing library and archives service and storage spaces where appropriate.
• Develop a long-term plan for the identification and removal of seldom-used print collections.
3. Enabling Research and Scholarship

Tactics:

- Provide access to research-level collections to support new research areas.
- Develop policies and procedures to ensure the preservation and promotion of research data of Trent faculty and researchers.
- Develop a digital preservation strategy.
- Identify and increase the digitization of locally held collections of regional, national or global importance.
- Incorporate emerging technologies into the delivery of collections.
- Partner with Information Technology (IT) in the establishment of a Digital Institutional Repository at Trent, and in other Open Access initiatives.
- Investigate opportunities for Open Access (OA) publishing.

4. Building Partnerships

Tactics:

- Partner with other Ontario university libraries to build collections collectively.
- Collaborate with other Ontario libraries on a shared print storage strategy.
- Work with the UOIT Library to explore shared services within the context of the Trent-UOIT synergies initiative.
- Develop and implement a mandatory copyright and fair dealing learning program for all Trent stakeholders.
- Work with consortial partners (CRKN, OCUL, etc.) and with campus stakeholders to develop new scholarly publishing opportunities.
- Provide open communication and transparency related to the collections, resources and services of the Library and Archives.
- Promote the Library to current and potential benefactors and to develop a comprehensive plan for library advocacy and fundraising.

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3. Open access publishing is the system whereby published research in addition to being available in traditional journals is also available free of charge either through a repository hosted and maintained by a local institution or through the personal website of the author.
SUPPORTING TEACHING AND LEARNING

“From faculty survey...

The most important single issue is access to publications, whether hard copy or online, and all available resources should be devoted to this primary function of the library.” (from faculty survey)

“I often use my smartphone to search the catalogue while in the stacks. It would be great if the library could develop a single search interface that works across devices so I can keep doing my searches on the go!” (from student survey)

“Having personnel available to help students is a higher priority to me than online resources. Learning from a human being is always better than other options.” (from student survey)

“I think that TOPCAT could use a number of improvements, such as linking to the Databases E-Z and other resources. A single search interface would be my single most important request.” (from student survey)

The data collected by Trent University Library’s 2014 user surveys indicates students, faculty, staff and alumni rely upon the Library’s staff to help navigate the collections and information resources housed both physically and available digitally. However, as partners in research, teaching and learning, we believe we can do more to support our primary clientele.

The 21st century library requires systems to handle a variety of functions that meet the needs of both library staff and researchers. Researchers increasingly expect seamless access to resources in all formats (print, electronic, geospatial data, multimedia, etc.). They do not see the resource management work done by librarians and staff to acquire, catalogue, create web based guides to resources, etc. to make resources accessible. Also, the Library increasingly has to make tough decisions regarding whether or not to acquire or cancel access to electronic resources.
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<th>TACTIC</th>
<th>INITIATIVE</th>
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<tr>
<td>Implement advanced search and discovery tools to facilitate efficient,</td>
<td>While other Ontario academic libraries have kept pace, or are moving forward, with current integrated library system technologies, the Library’s current system is at risk of becoming outdated. A significant number of respondents to the faculty and student survey indicate they are not happy with the current online catalogue, TOPCAT. They want effective discovery and access to resources, regardless of format. The Library will develop a plan to identify, fund, and migrate the current system to one that will meet both the discovery needs of users and the resource management needs of the Library.</td>
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<td>deep access to Trent’s collections</td>
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<td>Incorporate emerging information technologies in the delivery of</td>
<td>We will collaborate closely with Trent IT services and with our consortial partners to develop the capability for Trent stakeholders to use their local login to access Trent Library resources from university and college campuses across Canada or elsewhere in the world. We will also need to upgrade equipment to support the ongoing expansion of digital content and electronic resources.</td>
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<td>services</td>
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<td>Expand the Information Literacy of all students</td>
<td>To be full and successful participants in an information-driven society, Trent students must be information literate. The Library plays a crucial role in contributing to information literacy through instruction, personal research assistance and collaborating with campus partners in teaching and learning.</td>
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<td>Develop a more integrated approach to assisting students with</td>
<td>The Library plans to liaise with academic support units to provide on-site assistance with writing and other learning strategies. The Library will work with schools or units within Trent to support effective teaching and research and provide support for student-focused learning support services, e.g. a Centre for Teaching and Learning. The Library also plans to partner with OCUL to implement the Ask a Librarian Service, a province wide collaborative initiative which provides evening and weekend research assistance to students.</td>
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<td>research, writing, computing, and general learning skills</td>
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<td>Support critical enquiry initiatives</td>
<td>In collaboration with faculty and other relevant campus partners, the Library will continue to explore and develop new approaches to information literacy instruction for all disciplines.</td>
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<td>Develop a stable funding framework to acquire and sustain collections</td>
<td>Escalating subscription costs due to contract increases, and unfavourable exchange rates, and the effects of prior budget reductions currently consume 90% of available acquisitions funds. The Library and Archives will advocate for a stable acquisitions and operating budget, which will permit the implementation of the initiatives and strategic priorities identified within this plan.</td>
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<td>that are responsive to teaching and learning goals and outcomes</td>
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CREATING SPACES FOR COLLABORATION AND LEARNING

“The Library should aim both to provide space for students to mingle and collaborate, and for students/faculty to conduct quiet study and research. One should never be sacrificed for the other. Having both is essential.”
(from faculty survey)

“There needs to be more outlets in the school and library since many people bring their laptops to study with and I base my studying on where there is a plug first.”
(from student survey)

The academic library is at the centre of discovery and intellectual exchange, both physically and virtually. We aspire to be a welcoming and attractive environment that enriches the student experience. The Trent Library has continued to experience a progressive annual increase in the number of visitors, to both the virtual and the physical library space. The physical library building as ‘learning space’ is still a necessary component that complements and sustains the digital library.

According to the Association of Research Libraries and the Ontario Council of University Libraries (OCUL), the standard allocation of study spaces in libraries is 20% and 27% of the student population respectively. At present, the Library has space in its branches for about 5% of its total student FTE.

The Library’s physical spaces have a significant impact on campus life and learning. While the primary traditional use of academic library space (housing and accessing print collections) is waning, traffic to our branches has increased to the point that we are now beyond capacity throughout most of the academic year. User survey feedback about library space frequently targets the inadequacy of the existing facilities to meet users’ expectations.

We propose a major refurbishment and expansion of the Bata Library building to increase the amount of available library space to be responsive to the changing multidisciplinary landscape as well as address student concerns for increased quiet study space, safe space, collaborative study areas, and flexible computing spaces. This may include recovery of non-library spaces within the Bata Library building. We also propose to review the library space on the Oshawa Campus.
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<tr>
<td>Design and safeguard flexible, comfortable and technology-friendly</td>
<td>Students will continue to make extensive use of physical spaces for research, quiet study and collaborative learning. While a limited number of casual student spaces have been incorporated into the Bata Library, survey feedback indicates that these do not fully meet the needs of students seeking different kinds of academic spaces. Trent University should focus efforts on renewing and expanding Bata Library by updating furnishings, creating collaborative learning areas, developing effective silent study spaces and ensuring that all learning spaces are equipped with electrical outlets and/or charging stations for mobile devices.</td>
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<td>learning spaces for undergraduate and graduate students</td>
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<td>Respect Trent’s design legacy in the creation and development of any</td>
<td>The Bata Library, like many of the other original buildings on the Symons Campus, is an iconic example of modernistic architectural masterpieces designed by the late Canadian architect Ron Thom. Thom’s original design for the Bata Library also included tables, chairs and other furniture designed by famous designers such as Saarinen, Bertoia, Jacobsen, etc. Most of the original, furnishings and accessories have either been discarded or removed or else are in threadbare condition. The original concept of the Bata Library as a light-filled structure appointed with modern, tasteful and functional furniture groupings has been lost. In planning for any renovations and refreshment of Bata Library space, the Library will pay close attention to incorporating original Ron Thom design features wherever possible.</td>
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<td>new learning and study spaces in the Bata Library</td>
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<td>Consolidate existing library and archives service and storage spaces</td>
<td>The Bata Library is not able to make use of compact shelving because of its design. Any library expansion should be designed to allow the use of compact shelving for collections, in order to preserve immediate on-site access, but also to free up space that could be re-allocated as study space. We also plan to investigate the feasibility of off-site storage for seldom-used collections. This off-site storage may be Trent specific, or in partnership with or other Ontario universities.</td>
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<td>where appropriate</td>
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<td>Develop a long-term plan for the identification and removal of</td>
<td>In order to optimize the storage of its print collections, while recognizing the need for more “people” space, the Library will actively pursue opportunities to collaborate with its Ontario partners to develop shared collection management strategies for lesser-used print resources. For example, there are current discussions with UOIT Library about possible bilateral ventures that might include a shared print storage strategy for PSE institutions in the Durham-Peterborough areas. As a member of OCUL, the Library is an active participant in discussions about potential, sustainable initiatives to provide a shared, Ontario-wide print research collection.</td>
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<td>seldom-used print collections</td>
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ENABLING RESEARCH AND SCHOLARSHIP

“It is vitally important to my research that I have access to online journals and journal databases.” (from student survey)

“Being able to access electronic material is of utmost importance for my research. I no longer access print journals or print books at the library... Electronic material is easy to search and to share and to quote.”
(from faculty survey)

“ILL/Racer is absolutely critical. It would be impossible to do research without this. I routinely order large numbers of books and articles through ILL/Racer. I cannot imagine a faculty member in social sciences being able to research without this.”
(from faculty survey)

The Library plays a valuable role in advancing the research mission of the University. Trent’s librarians, archivists and staff apply their knowledge and expertise to ensure access to the resources required by all members of the Trent community in the pursuit of their research and learning. They also apply their knowledge of information and data organization, the web, research methods, copyright issues, and their subject expertise in support of the research and learning needs of the Trent community.

From student survey...

“It is vitally important to my research that I have access to online journals and journal databases.”
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<tr>
<td>Provide access to research-level materials to support all research</td>
<td>The Library must be flexible in ensuring that, to the best of our ability, the needs of Trent researchers are being met. The Library will monitor the information environment for new and relevant material and, where possible and appropriate, provide access to it. The Library will work with other academic partners to ensure that research resources from other institutions are easily accessible, and will advocate strongly for the necessary funds to support the research resource needs of the community.</td>
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<td>areas</td>
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<td>Develop policies and procedures to ensure the preservation and</td>
<td>Funding agencies are requiring researchers to make their publications available via open access. The Library will support an institutional repository pilot project, with the goal of establishing a Trent institutional repository. This repository would serve as a publicly accessible portal to the research output of Trent scholars.</td>
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<td>promotion of research of Trent faculty and researchers</td>
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<td>Develop a digital preservation strategy</td>
<td>We will review materials and identify unique and at-risk library and archival resources which need preservation and are not already available digitally. We will emphasize items related to the University and its history as well as regional materials.</td>
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<td>Identify and increase the digitization of locally held collections</td>
<td>Digitization preserves the content of rare and/or unique resources. By making this digitized material available over the Internet, we support the research and scholarship of those not only in the Trent community but individuals in the local region and beyond.</td>
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<td>of regional, national or global importance</td>
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<td>Incorporate emerging technologies into the delivery of collections</td>
<td>Information systems and support underpin almost all academic library services. More improvements or expansions of Trent University Library services will be dependent on improvements to our information infrastructure. In partnership with Trent’s Information Technology Services, the Library will monitor information technology capacities on an ongoing basis to ensure reliable access to extensive digital collections across a complex network of library-specific technologies.</td>
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<td>Partner with Information Technology (IT) in the establishment of a</td>
<td>Leverage the complementary skills and resources of IT and the Library to develop Open Access initiatives and to develop an effective and stable Institutional Repository.</td>
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<td>Digital Institutional Repository at Trent, and in other Open Access</td>
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<td>initiatives</td>
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<td>Investigate opportunities for Open Access publishing</td>
<td>Given the pending requirement by the federal granting councils that all research funded by them be made open access, the Library will explore the various types of open access publishing available, the monetary implications of this requirement, and the infrastructure necessary to support open access publishing at Trent, and will report its findings to the community.</td>
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BUILDING PARTNERSHIPS

“Interlibrary loan (Racer) is a very important library service. I have often had to access books and journal articles through this service.” (from student survey)

“The Racer service has been integral to my research so far this year. However, I would like additional access to online journals/databases and archival materials.”
(from student survey)

University libraries and archives have traditionally participated in national and international resource sharing networks using their interlibrary loan services and the Scholars Portal. As well, the Trent University Library participates in the Canadian Research Knowledge Network (CRKN) and the Ontario Council of University Libraries (OCUL). These networks provide member universities with enhanced purchasing power through economies of scale, and, in the case of the Scholars Portal, an innovative, comprehensive and cost-effective shared technology platform for the delivery of digital information resources.

The participation of librarians and library staff in provincial, national and international networks and organizations also promotes Trent University as being forward-looking, as having a knowledgeable and expert library and archives staff supporting students and faculty and as understanding and responding to the complexities of the scholarly research and learning activities on our local campus.
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<tr>
<td>Partner with other Ontario university libraries to build collections</td>
<td>Since the early 2000s, the Library has taken an active part in consortial initiatives to acquire digital scholarly information resources collectively, on both a regional and a national basis. Through its memberships Trent has acquired affordable access to a vast array of scholarly journals. The Library plans to continue to participate in further collective collections development initiatives that will lead to further enhancements of Trent’s holdings.</td>
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<td>Collaborate with other Ontario libraries on a shared print storage strategy</td>
<td>OCUL is taking a leadership role in the development of shared storage strategies. For the past few years, collaborative initiatives such as the Thunder Bay Agreement of Shared Print Storage have guided OCUL’s and Trent’s direction on the retention of print resources. Trent will continue to take an active role in the development of desirable and cost effective strategies and options for the collective storage of Ontario universities’ print information legacy.</td>
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<td>Work with the UOIT Library to explore shared services within the context of the Trent-UOIT synergies initiative</td>
<td>Explore the potential for collaboration with the UOIT library in several service areas, such as Library IT services and next-generation library systems; acquisitions cataloguing, and digital resource management; digital research data management; archives and special collections; and maps and geospatial support services.</td>
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<td>Develop and implement a mandatory copyright and fair dealing learning program for all Trent stakeholders</td>
<td>Since 2010 the library has been the designated unit responsible for copyright administration for the university. Subject to continuing financial resources, a copyright and fair dealing education program will be developed by the Copyright Office to ensure that all members of the Trent community are aware of their rights and responsibilities with respect to the use of copyrighted materials.</td>
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<tr>
<td>Work with consortial partners (CRKN, OCUL, etc.) and with campus stakeholders to develop new scholarly publishing opportunities</td>
<td>Through its consortial partners, Trent plans to take advantage of emerging opportunities for Open Access (OA) publishing, and to work with campus stakeholders to facilitate the development of OA journals at Trent. Subject to appropriate funding.</td>
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<td>Provide open communication and transparency related to the collections, resources and services of the Library and Archives</td>
<td>Building on successful projects such as the Subscription Review Initiative, we will use social media as a tool to develop understanding and cooperation with our stakeholders, actively seeking feedback and encouraging public discussions. We will strengthen our relationships with academic departments as we strive to match resources with the research requirements of current course content.</td>
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<tr>
<td>Promote the Library to current and potential benefactors and to develop a comprehensive plan for library advocacy and fundraising</td>
<td>Working with the Advancement Office and other campus stakeholders, the Library will develop a comprehensive case for support that is reflective of the long-term objectives set out in the University’s academic, research and strategic plans. This case for support will complement the strategic fundraising priorities of the university.</td>
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SUMMARY

In today’s post-secondary education environment, innovation, collaboration and transformation are key elements for the success of the modern university. This strategic plan is a roadmap to develop ideas, processes and partnerships that will enhance the Library and Archive’s support for Trent University’s organizational and academic goals over the next three years.

Changes in technology are causing universities to re-evaluate the way they deliver teaching and research support. Nowhere is this challenge demonstrated more clearly on the front lines than in a university’s library.

The four strategic directions of the plan: Supporting Teaching and Learning, Creating Spaces for Collaboration and Learning, Enabling Research and Scholarship and Building Partnerships, create a framework that will, in the short-to-medium-term, complement Trent’s current institutional plans. This strategic plan is a realistic, achievable roadmap for the continuing development of the Library and Archives.
APPENDIX 1

Participants in the Strategic Review

Members of the Strategic Review Task Force

Robert Clarke (Chair)
University Librarian

Loretta Durst
Manager, Administration and Communications
Library and Archives

Kenneth Field
Oshawa Campus Librarian and University Copyright Officer
Trent University Oshawa

Janice Millard
Curator of Archives, Special collections, Rare Books and Gifts
University Archives

Kristy McKeown
Client Support Associate
Bata Library

Tracy Sallaway
Data and GIS Support Specialist
Maps, Data and Government Information Centre

James Watson
Learning and Liaison Librarian
Bata Library
APPENDIX 2

In developing this strategic plan, the Library Task Force first consulted students, faculty and alumni by inviting them to complete an online survey. The survey questionnaires can be found at:

trentu.ca/library/about/strategic plan.htm