



# STRATEGIC PLAN 2023–2026



UNIVERSITY  
of Prince Edward  
ISLAND

ROBERTSON LIBRARY



WELCOME  
UNIVERSITY  
OF PRINCE EDWARD  
ISLAND



The University of Prince Edward Island’s Robertson Library is grateful to be located on Epekwitk, part of Mi’kma’ki, the ancestral and unceded territory of this Island’s Indigenous People, the Mi’kmaq. Acknowledging the benefits of being on this land, the Library commits to becoming a more welcoming space for all Indigenous Peoples by centring Indigenous voices in our collections, services, and programs.

We also embrace our role in the University’s ongoing efforts to implement the Calls to Action from the Truth and Reconciliation Commission of Canada.

These commitments go hand-in-hand with our engagement in the University’s pledge, through its Equity, Diversity, and Inclusion Strategy, to continue “identifying and removing barriers, encouraging participation, and working towards an inclusive campus culture.”





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## **MISSION STATEMENT:**

The Robertson Library is an active partner in, and integral to, the University's teaching, learning, and research mission. We enrich this mission in our communities by providing the expertise, instruction, and infrastructure needed to ensure the sustainable and reliable discoverability of scholarly publications and other information resources that contribute to the creation, dissemination, and stewardship of knowledge, education, and research at the University. The Library's work is grounded in collaborative partnerships, robust systems, and high-quality collections, made accessible through inclusive on-campus and online spaces.

## **ORGANIZATIONAL PRIORITIES:**

Guided by our Mission Statement, the goals of our Strategic Plan have been grouped into three broad Priority Areas:

- A) Teaching, Learning, and Research
- B) Collaborative Partnerships
- C) Sustainability and Revitalization

| <b>A. Teaching, Learning, and Research</b><br><br>The Robertson Library team has unique expertise, knowledge, skills, a spirit of innovation, and a level of creativity that spans disciplines, communities, and the needs of many groups and individuals. As a result, the Library is core to the University’s mission to deliver higher education learning experiences, research, academic programming, and community building. | <b>B. Collaborative Partnerships</b><br><br>The Robertson Library is a powerful catalyst for collaboration, bringing people, ideas, and processes together to support journeys of discovery and lifelong learning in our University community, as well as our provincial and global communities. | <b>C. Sustainability and Revitalization</b><br><br>The Robertson Library is committed to providing accessible and inspiring library spaces that welcome and connect us in-person and virtually. We recognize the interconnectedness of our physical environment and the wellbeing of our people, and we are guided by the values of sustainability and wellness in all we do for the benefit of our employees, students, and community members. |
|---|--|---|
| <b>Goals</b>  | <b>Goals</b>   | <b>Goals</b>  |
| <b>A-1</b><br>Ensure the Library’s information resources support the University’s instructional and research activities.  | <b>B-1</b><br>Support and foster current and ongoing external partnerships, while also exploring new engagement opportunities.   | <b>C-1</b><br>Reinvigorate the Library’s physical and digital infrastructure to create inspiring and inclusive spaces.  |
| <b>A-2</b><br>Encourage students in developing the critical information and digital literacy skills necessary to be successful contributors to society.   | <b>B-2</b><br>Engage with institutions, community groups, and individuals on Prince Edward Island to make unique heritage and cultural materials accessible.   | <b>C-2</b><br>Ensure the Library’s online presence meets the accessibility and usability requirements of our communities.   |
| <b>A-3</b><br>Serve as stewards of the University’s scholarly and research output, and champion a campus culture of open access.  | <b>B-3</b><br>Contribute and champion open source and open scholarship initiatives such as Islandora.  | <b>C-3</b><br>Foster a culture of communication.  |
| <b>A-4</b><br>Review the Library’s programs and services to ensure alignment with the needs of the University community.  | <b>B-4</b><br>Build relationships with campus partners to enhance student experience and success.  | <b>C-4</b><br>Seek avenues for library employees to build skills and foster their wellbeing.  |
| <b>A-5</b><br>Offer student experiential learning and training opportunities.   |  | <b>C-5</b><br>Conduct a holistic quality assurance assessment of the Library, which includes a self-study.  |



## MEETING OUR GOALS: LIBRARY ORGANIZATION

To manage its work effectively, the Library is organized in the unit structure outlined below. The volume and complexity of tasks performed by the Library require some measure of specialization and focus within each unit, but implementing the Strategic Plan will also necessitate significant communication and cooperation across all units. While some goals may resonate more with some units than others, each unit should see itself reflected in all of the above goals, both while managing work currently being performed and when identifying work that needs to be done.

With this in mind, it is recommended that all units adopt a reporting framework that references the goals of the Strategic Plan wherever possible. When unit reports are submitted to Library Council, for example, updates on work accomplished and upcoming priorities could be grouped by goal; similarly, unit meeting agendas and notes could refer to goals outlined in the Strategic Plan. It is not expected, of course, that all units will be fully engaged on all goals at all times, but rather that any alignment between the goals in the Strategic Plan and the ongoing work (and future plans) of a unit should be clearly documented. Relatedly, when units experience difficulty achieving the tasks necessary to meet certain goals due to resource constraints (staffing, budget), this should also be documented and reported; this will support the University Librarian's office in its ongoing effort *to work with the University to address Library budgetary issues, taking into consideration institutional growth and other pressures such as inflation.*

### LIBRARY UNITS

The **Acquisitions, Serials, and Electronic Resource Management Unit** processes collections orders and payments, manages print and electronic serials, manages discovery tools for patrons for that content, maintains all aspects of collections-related third-party online



institutional accounts including collecting and reporting usage data, and troubleshoots technical issues with access to licensed collections content. The unit coordinates with cataloguing, University Archives and Special Collections Unit, and reserves staff in processing, recordkeeping, and holdings discovery, including special projects relating to collections management and preservation.

The **Administration, Outreach, and Access Services Unit** is organized into two subunits:

#### Administration and Outreach

Administration supports the University Librarian who has overall responsibility for the Library's budget, human resources, facilities, and the operation of all its units, along with the University's Central Printing office. Outreach is supported by the University Librarian's office and seeks to contribute to the student experience at UPEI through a variety of activities, to communicate with the community through social media and other methods, to maintain and develop partnerships and collaborations, and to connect with existing and potential donors.

#### Access Services

Access Services is often the first point of contact for library users, and the team is committed to making collections accessible and providing excellent customer service to all users. Access Services staff assist library users with locating and using library materials, services, and technology; provide information/reference service in-person by telephone and online via the Library's virtual chat service; carry out circulation functions for materials that the Library loans; manage the library's reserve materials; shelve materials; maintain the stacks; facilitate room bookings; track transactions and collate statistics; conduct tours; engage in Library-related projects; and supervise student assistants. Many staff members are cross-trained to support other unit activities in the Library.

The **Cataloguing and Metadata Unit** is responsible for the creation, maintenance, and administration of metadata records within the Library's catalogue and internal collections.

The **Digital Initiatives and Systems Unit** is responsible for the development, deployment, maintenance, and support of the Library's digital infrastructure and physical hardware.

The **Instructional Services Unit** supports the missions of the Robertson Library and the University of Prince Edward Island by promoting information literacy. We strive to educate our diverse user population to define information needs, and to locate, critically evaluate, and use all available information resources effectively and responsibly. Fostering these skills will prepare our users for success in academia and beyond. We are committed to anticipating and embracing changes in the information and instructional environment, and collaborating with our users to foster a shared sense of enjoyment and empowerment in the pursuit of lifelong learning.

The **Scholarly Communications and Resource Sharing Unit** develops and supports systems and services that facilitate the creation, dissemination, and preservation of scholarly works throughout the research life cycle. The unit provides expertise in interlibrary loan, open scholarship (open educational resources and open repositories), research data management, and knowledge synthesis reviews.

The **University Archives and Special Collections (UASC) Unit** is responsible for the development and preservation of collections of unique or rare materials documenting the culture and heritage of Prince Edward Island and the University of Prince Edward Island, and for facilitating access to these collections.



CONG  
ELIZABETH EPP

L.M. Montgo

THE YOUTH COMPANION  
EASTER 1894



MEMORIAL  
I could not do without you  
but would be wiser if  
ALL MEMBERS WOULD  
BUY TO VISIT US  
and see the great picture  
of Miss

## OUR STRATEGIC PLANNING PROCESS

The Library started its strategic planning process in the spring of 2022 with an all-library staff planning session facilitated by Charlotte McCardle, Director of Strategic Planning at UPEI. We gathered the feedback provided during that session and established a Strategic Planning Working Group (SPWG) to work on transforming it into a Strategic Plan document. The SPWG met throughout the summer of 2022 to collate, review, and reflect on the materials gathered and continued to work with Charlotte McCardle to refine the Plan. A draft Strategic Plan for the Library was developed during the fall and shared with Library Council during its December 2022 meeting. Council members unanimously recommended that the draft Plan be distributed to the full Library team for feedback. This Plan incorporates the feedback received through the planning and consultation process. Thank you to all of the Library staff; the members of the SPWG including Simon Lloyd, Kim Mears, Sarah Fisher, and Cindy MacDonald; and Charlotte McCardle for her ongoing advice and support during the process.





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