

Preservation Department Strategic Plan 2012-15 **revised Sep 2013**

Yale University Library Preservation Department's Strategic Plan for 2012-15 was developed in coordination with the Library's overall strategic planning. As such it has as its basis YUL's Mission, Vision, and Guiding Principles as well as the Department's own Mission Statement:

The Yale University Library's Preservation Department supports the YUL mission by ensuring continued access to the Library's collections, through a program of specialized expertise, proactive stewardship and collaboration.

The Department has worked together to identify five strategic objectives with supporting goals and actions that will enable us to meet our objectives over the next three years.

Objectives:

Work to increase the Department's effectiveness across the Library

Continue to leverage the knowledge and expertise of its staff to provide the most effective and efficient services to meet the Library's preservation and conservation needs

Advocate and work to bring the physical infrastructure (space & technology) to a level that enables it to begin to meet its mission

Advocate for budget structures and prioritization systems that recognize and provide for a more equitable distribution of resources to meet the Department's mission to serve all of the Library's collections

Renew its commitment to professional development by investing in its most critical resources--its current staff and future professionals.

	objectives	goal(s)	actions	sponsor	timeline (complete by)	status/update
Strategic Objective 1	Work to increase the Department's effectiveness across the Library	Look for opportunities to showcase work done in the Department--either individual accomplishments or projects completed by a unit.	Showcase work in the Preservation newsletter as well as various venues that emerge within the Library	Roberta Pilette Euan Cochrane Tara Kennedy Robert Klingenberger Christine McCarthy Paula Zyats	ongoing	added Sprg 2013 Examples of venues in FY14: Highlighting the IPI Environmental study done in SML stacks when final report issued; Staff participation in Staff Appreciation & Recognition Fair - Spring 2014
		Identify the areas of growth and change in which Preservation is or should be involved.	1) Analyze internal reviews already completed in preparation of the re-org and programmatic planning organize to identify those areas of which we already are aware.	Roberta Pilette Euan Cochrane Tara Kennedy Robert Klingenberger Christine McCarthy Paula Zyats	end of FY14	added Fall 2013
			2) Review above information and identify known gaps			
			3) Compile information and use to build on success and address the gaps.			
		Gather information from customers		end of FY15	This will be further developed once the internal review is complete.	
	Continue to leverage the knowledge and expertise of its staff to provide the most effective and efficient services to meet the Library's preservation and conservation needs.	(1) Establish a departmental structure more clearly understood to our customers.	Brainstorm department tasks, unit, and those departments outside of preservation with whom there are or could be partnerships	Roberta Pilette Euan Cochrane Tara Kennedy Christine McCarthy Robert Klingenberger	Fall 2012 completed	Internal to the department brainstorming completed including areas of potential growth and future collaborators. Fall 2012 Re-org completed Sprg 2013 [Will revisit this info in looking

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Strategic Objective 2		Identify potential future service growth areas	Klingenberg Paula Zyatts		[will revisit this info in looking at above goal in Strategic Object 1]
	(2) Within the new organizational structure match staff skills and knowledge to tasks and units	Identify potential partners for future collaborations			
		Update current job descriptions to reflect current responsibilities	Roberta Pilette Euan Cochrane Tara Kennedy Christine McCarthy Robert Klingenberg Paula Zyatts	June 30, 2013	Ongoing updating of jds 4/2013; all job descriptions will be updated as part of the perf appraisals, Fall 2013
		Contact LHR and Union representatives to discuss the new organizational structure and engage them in the process of creating new job descriptions:			Aug 2013, as job descriptions and current tasks/responsibilities were reviewed this turns out not to be a major concern.
		Create new job descriptions for new organizational structure	Roberta Pilette Euan Cochrane Tara Kennedy Christine McCarthy Robert Klingenberg Paula Zyatts	This is dependent upon findings/results from goal #1 within this objective. May start anytime in calendar year 2013.	
		Identify where current j.d.s map to the new j.d.s in the new organizational structure			
	Map current staff to new j.d.s in new organizational structure				
	Develop staff				
	Recruit new staff				

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	Imagine "ideal" Preservation Department and work with consultants (architects) to create a rendering of this Department in terms of vision and function.	Collect data on equivalent libraries and preservation or conservation models and labs; most recent renovations or new initiative programs for comparison	Roberta Pilette	August/Sept 2012 completed Fall 2012	completed Fall 2012 An informal survey of 7 peer institutions was inconclusive beyond the fact that funding seems to drive staffing and space. No correlation between size of department & size of collections or services offered.
Strategic Objective 3		Define our "big picture" vision and needs (values/attributes of a great program and efficient and effective functions to carry out work now and in the future)	Roberta Pilette Tara Kennedy Robert Klingenberger Christine McCarthy Paula Zyats	Fall 2012 completed Summer 2013	Spring 2013: This put on hold until Pfeiffer report completed. Summer 2013: This done in connection with Sam Anderson Associates for programmatic planning
		Establish an Advisory group or review panel; include Library Development	Roberta Pilette	early Winter 2012-2013	on hold
		Identify consultant/architect to assist with visualization exercise and create renderings and get cost estimates	Roberta Pilette	Spring 2013	Jul - Aug 2013; Sam Anderson Associates hired to do space study. Final report submitted 8/30/13
		Work with selected consultant to define needs and wishes; Department level and at unit level	tbd	summer/fall 2013	Fall 2013: With the emergence of 344 Winchester as a possible future venue for the Preservation Department along with BRBL Tech Svs, the control of how this project moves forward has moved outside of the Department.
		Produce final renderings	tbd	winter 2013	
		Share visual rendering of Department of future;	tbd	winter 2013	
		Disseminate through appropriate means or venues	tbd	spring 2013	

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Strategic Objective 4	Advocate for budget structures and prioritization systems that recognize and provide for a more equitable distribution of resources to meet the Department's mission to serve all of the Library's collections	Create 2-3 different budget/prioritization scenarios that would better serve the Preservation Department's mission of ensuring continued access to all of the Library's collections and propose them to Library Administration.	Define what the Department is currently working with in terms of budget structures and prioritization systems	Roberta Pilette	fall 2012 completed	presented current budget issues to LEC Fall 2012
			Gather data from ICE database & other sources to establish baseline of activities		summer 2014	Aug 2013 - ICE database delayed in development; using spread sheets to gather data.
			Create a proposed budget designed to meet the preservation programmatic needs		fall 2014	on hold. Library budget for next for next few years is flat at best.

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<p>The Preservation Department will renew its commitment to professional development by investing in its most critical resources—its current staff and future professionals.</p>	<p>Support Professional Development for Current Staff</p>	<p>Analyze professional travel for learning and representation at conferences & meetings.</p>	<p>Roberta Pilette Murray Harrison</p>	<p>ongoing</p>	<p>Began tracking fy 13 and have fy13 travels, who and funding source. Travel & Training budget given to Dept for control fy14</p>
		<p>determine which meetings/conferences should have departmental representation (poll staff for suggestions)</p>	<p>Roberta Pilette Euan Cochrane Tara Kennedy Robert Klingenberger Christine McCarthy Paula Zyats</p>	<p>winter 2012-13</p>	<p>Ongoing</p>
		<p>determine what level of funding is needed to support travel for learning and representation</p>	<p>Roberta Pilette Murray Harrison</p>	<p>spring 2013</p>	<p>Travel & Learning budgets are set by Library srpg 2013 for fy14; budget in Dept control as of fy14</p>
		<p>Communicate the need to Learning Center/Library IT for specialized training in our department</p>	<p>Robert Klingenberger Christine McCarthy</p>	<p>summer 2013</p>	
		<p>Identify specific needs, re: software, language, etc.</p>			
		<p>Foster cross-institutional preservation/conservation dialogue at Yale</p>			
		<p>Continue Conservation Interest Group; include all Preservation staff</p>	<p>Robert Klingenberger Christine McCarthy</p>	<p>fall 2012</p>	
		<p>Explore possibility of establishing digital interest group(s)</p>			<p>Robert's AV group estb'd winter '13</p>

Strategic Objective 5

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		Take advantage of free learning opportunities	all staff	immediately & ongoing	
		Continue hosting preservation-themed activities for Library/University ----- local talks/lectures ----- /workshops ----- ALA & AIC based webinars	Roberta Pilette Robert Klingenberger Christine McCarthy Tara Kennedy	ongoing	Preservation Lecture Nov 21, 2013
		Tap into knowledge/expertise in other departments. (MSSA, IT)	Roberta Pilette Euan Cochrane Robert Klingenberger Christine McCarthy Tara Kennedy	ongoing	Use this to also to help increase effectiveness as outlined in Strategic Ojective 1.