

**Oregon State University**  
**Libraries and Press**  
**Strategic Plan 2012-2017**  
**REVISED FALL 2015**

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## **MESSAGE FROM THE UNIVERSITY LIBRARIAN AND PRESS DIRECTOR**

The strategic plan of Oregon State University Libraries and Press articulates how we will make essential contributions to Oregon State University's drive to be a top ten land grant institution. As OSU advances toward its goal, the University will pursue several strategic initiatives held in common with its aspirational peers:

- enhance the quality of the teaching and learning environment so graduates can help solve the dynamic issues facing the world today and tomorrow;
- increase achievements in research, scholarship, and creative expression; and
- pursue global visibility to enhance OSU'S international reputation while reaching out and engaging with the citizens of the state and beyond.

The agility, resourcefulness, and pioneering spirit of the OSU Libraries and Press have prepared us to be an integral part of the University's achievement of these initiatives. We expect to build upon our past achievements--bold successes at migrating library resources aggressively to electronic formats, establishing ourselves as the principal content provider for OSU faculty and students, and leading our peers in the pursuit of digital library initiatives. The OSU Valley Library is already recognized as a major destination for the OSU Corvallis community, especially undergraduate students. We have been a strong partner in moving the University's teaching mission forward while we pursued innovative directions in our own instruction program. Our digital publishing and curation activities have expanded access to the University's intellectual output, Oregon's multicultural history, and unique resources in the history of science. The Libraries and Press have created and promoted scholarship about the history, culture, and natural resources of the state of Oregon and the Pacific Northwest.

While OSU Libraries and Press have been bold, this strategic plan calls upon us to be bolder. This five-year plan establishes four broad goals for the Libraries and Press to undertake in our support of the University's strategic goals. Achieving these four goals will position OSU Libraries and Press as a model for other research libraries and presses to emulate:

- We will heighten the learning experience of OSU students through the transformation of our physical and virtual spaces. To accomplish this transformation we will integrate and promote our content in the environments where users work, interact, and seek leisure.
- We will establish ourselves as a unique contributor to the academic success of OSU students. The creative and purposeful design of the Libraries' own teaching and engagement program and the pursuit of focused research by OSU library faculty will highlight our expertise in topics such as information

literacy, information management and organization, scholarly communication, and data management planning.

- We will address the critical need to promote OSU's scholarly and research accomplishments to the citizens of Oregon as well as the larger scholarly community. We will accomplish this through the development of innovative services and tools as well as best practices. These efforts will assist scholars as they create, display, discover, use, preserve, and communicate knowledge, information, and data. Through the library faculty's focused research agenda, we will play a significant role in advancing the scholarship of library and information science.
- We will continue to use input gathered through our stakeholders' active participation in this plan's development to guide us. By actively engaging with OSU students, faculty, and supporters we will ensure that our strategic directions match their evolving needs and expectations. We will assess our performance regularly to demonstrate the value of our services, collections, and personnel.

The future promises both an exciting and a challenging time for research libraries and university presses like OSU Libraries and Press. Meeting the challenges of the future calls upon the strategic deployment of resources, the most important being focused placement and development of the staff and faculty of OSU Libraries and Press. It also requires the cultivation and stewardship of new and ongoing supporters and donors who share our vision for the Libraries and Press. Most importantly, our success demands ongoing engagement and communication with the OSU campus. This audacious strategic plan for 2012-17 represents the initial step in reaching the promise of that engagement. I encourage you to join us in the plan's launch and partner with us to reach its successful implementation.

Faye A. Chadwell  
Donald and Delpha Campbell University Librarian  
and OSU Press Director

## EXECUTIVE SUMMARY

The development of the OSU Libraries and Press Strategic Plan comes at a time of extraordinary transformation for academic libraries and university presses. We face fundamental changes in higher education, information technology, student and faculty demographics, and scholarly communication. Evolving approaches to teaching and learning are reshaping the way we approach the design of space in our facilities. These approaches require—and students expect—the ability to explore, examine, and study collaboratively. We are in the midst of a revolution that is altering how information can be accessed and linked together.

Researchers are looking to OSU Libraries and Press to take the lead in moving the campus forward into a new world of open science, open data, and open publications. Innovative course delivery options, Open Access publishing, new consumer technology products, availability of content outside traditional library boundaries, and data management mandates by grant funding agencies also demand shifts in the way libraries, presses, and universities function.

For those reasons, the OSU Libraries and Press Strategic Plan establishes an ambitious pace over the next five years. At the core, we remain committed to flexibility, innovation and resourcefulness. In addition, we will measure the quality of our programs and services focusing on our impact on student learning and engagement, and faculty productivity. We envision being at the center of intellectual engagement and scholarship at OSU, while helping the University achieve its goal of becoming a top ten land grant institution.

Always a forward-thinking organization, OSU Libraries and Press will shape our future around our strengths and values. We will embrace our reputation for experimentation, build upon our essential services and programs, and maintain a strong user-centered orientation. Our plan recognizes the engine of our success: our world-class faculty and staff, and the significant role they will play in shaping our future.

In focus groups and conversations, our campus and community stakeholders told us that they recognize and appreciate our core successes:

- acquiring, organizing, and preserving library resources that support research and instruction;
- teaching students to find as well as evaluate information;
- contributing to the development of new knowledge, especially knowledge focused on the Pacific Northwest; and
- developing programs and services that impact not only the campus, but also the state of Oregon and beyond.

Our stakeholders also challenged us to create inspired spaces for learning and engagement, offer easy-to-find digital resources, and provide expert guidance in data management and new publishing models. They made it clear that the OSU Libraries and Press can always improve how we tell our story, promote our resources and services, and expand upon the support we receive from library and press supporters. We must also challenge ourselves to demonstrate our success at advancing the University's ambitions as articulated in its strategic initiatives to:

- create signature programs that advance the science of sustainable earth ecosystems, improve human health and wellness, and promote economic growth and social progress;
- provide an excellent teaching and learning environment, and achieve student access, persistence, and success through graduation; and
- substantially increase revenues resulting from private fundraising, partnerships, research grants, and technology transfers.

The OSU Libraries and Press listened to stakeholders and acknowledged the challenges. By enacting this strategic plan, we seek to further align ourselves with the University's strategic initiatives. However, we must remain agile enough to respond to new university initiatives that will emerge over the next five years. We intend to discover innovative solutions to the major regional, national, and global trends facing Oregon State University and the state of Oregon. Our plan also addresses the principal strategic issues facing the library and press community as a whole. It acknowledges the important areas where we must grow as an organization in terms of resources, staff expertise, and collaboration.

In the next five years, OSU Libraries and Press will direct efforts across four key areas:

1. We will support an exceptional learning and research environment in our physical and virtual spaces. This environment will enable research and learning to thrive at OSU as students and faculty meet to discover content, exchange ideas, and build community.
2. We will develop a distinctive library learning and engagement program that adds value to an OSU student's educational experience. Our learning and engagement program will optimize student learning and success.
3. Not only will we advance the creation and dissemination of knowledge through our own contributions to scholarship and publishing, we will lead changes in the global scholarly environment through innovation and advocacy. Our resources will be globally accessible and responsibly managed. We will be critical to the success of researchers, whether they are faculty, graduate, or undergraduate students.
4. We will leverage the tremendous potential that already exists among our staff and faculty while investing in their ongoing professional development. A heightened focus on staff will increase our organizational capacity for

creativity, collaboration, adaptability and productivity, as well as enhance efforts to meet emerging needs.

Our core mission frames every aspect of the plan: To cultivate superior scholarship and creativity, empower discovery, and preserve and disseminate knowledge. With this plan, we acknowledge a future that will redefine academic libraries and university presses, as well as higher education. As those new definitions evolve, we are inspired to build on our outstanding record of success. We are emboldened to establish ourselves as a front-runner among research libraries and university presses.

## **MISSION STATEMENT**

The OSU Libraries and Press cultivate superior scholarship and creativity, empower discovery, and preserve and disseminate knowledge. We develop user-focused services, share our expertise through teaching and research, and build gateways to unique resources to further the growth of the University, the people of Oregon, and the global scholarly community. We advance OSU's land grant mission by contributing to learner success, scholarly excellence, and community engagement.

## **VISION**

The OSU Libraries and Press will be at the center of intellectual engagement and scholarship at Oregon State University. Students, faculty, staff, alumni, and the people of Oregon will highly value our research, teaching, and services. Our solutions to the evolving challenges of higher education and scholarly communication will serve as a model of innovation for academic libraries and university presses.

## **CORE VALUES**

In engaging with our community and working with our partners, we are guided by these values:

**Access:** We endorse and advocate the open exchange of information.

**Civility:** We create safe environments for discourse within our community.

**Collaboration:** We actively seek out partnerships and share our expertise.

**Diversity:** We recognize, promote, and value the differences within our organization and community.

**Innovation:** We improve and adapt by valuing risk-taking and intellectual discovery.

**Preservation:** We safeguard knowledge and the historic record for our community.

**Service:** We are passionate and intentional about helping others.

**Sustainability:** We are trusted stewards of our resources.

## **ENVIRONMENTAL CONTEXT OF STRATEGIC PLAN**

### **External Assessment**

Five key issues have the greatest impact on how we work and have defined our focus for this strategic plan.

#### **Changing Face of Education**

The fast-paced evolution of K-20 teaching and learning models, the rising influence of technology, and the internationalization of higher education are changing the face of college campuses and student populations. These forces are creating challenges and opportunities for everyone, especially first-generation students, students from differing educational backgrounds, and international students. We will leverage our unique expertise to serve these varied student populations to ensure college preparedness and academic success.

#### **University and Library Trends**

Academic libraries are committed to providing services and resources in an ever-changing economic and academic environment. In order to meet this challenge, libraries are emphasizing their unique collections, patron-driven acquisition, data management, online institutional repositories, and Open Access initiatives.

#### **Technology Ubiquity**

Meeting patron and researcher technology expectations will require new approaches to designing virtual and mobile spaces, protecting privacy and copyrights, and ensuring information access. We must play a leadership role in advocating for Open Access, embracing and experimenting with new technologies, and effectively applying technology in a higher education context.

#### **Demonstrating Value**

Rising college education costs demand greater accountability. We must articulate and demonstrate the value and impact of the OSU Libraries and Press for students and faculty, as well as for alumni, parents, and other stakeholders.

#### **Scholarly Communication and Publishing**

Publishing business models continue to evolve in how best to distribute content, generate revenue, and provide access to information. This impacts library purchasing power, effective content acquisition, and the licensing of required

resources. The OSU Libraries and Press is challenged to compete and innovate within this marketplace.

### **Internal Assessment**

#### **STRENGTHS**

##### **Our People**

OSU Libraries and Press have created a service-oriented culture, working collaboratively both within and outside the institution. OSU Libraries and Press faculty and staff thrive within a changing environment. We have the freedom to develop unique partnerships and work fearlessly under a leadership model that encourages creativity and risk taking. We have developed relationships across campus and with state agencies, other libraries, consortia, and Oregon tribes to share knowledge and provide services that extend beyond the Oregon State University community. Our focus on collaboration ensures OSU Libraries and Press will successfully serve our mission in a knowledge-based economy.

##### **Our Places**

Our collaborative learning spaces and library resources are key assets in attracting new students and supporting the long-term success and retention of students, faculty, and other patrons.

#### **SUCSESSES**

The OSU Libraries and Press have cultivated a reputation for being willing innovators. With world-class researchers, we take risks and think big, positioning ourselves to be our user community's intellectual touchstone. We build bridges, create knowledge, and break down walls to create a safe and inclusive space for learning.

##### **Engaged Interactions**

OSU Libraries and Press are successful when our faculty and staff interact with our user communities. Either one-on-one or through the development of interactive personal services, we change lives when we play an active role in our community.

##### **Student-Centered Focus**

OSU Libraries and Press are successful when we work with our users and respond to their needs. As the size and diversity of our user community evolves, we will continue to work with and listen to our patrons to ensure we continue to meet their evolving needs.

## **Research Stewardship**

Because Oregon State University is a land grant institution, the OSU Libraries and Press have a unique responsibility to disseminate research and information to the people of Oregon and to work with other cultural heritage centers statewide to enable learning for all Oregonians.

## **Collections of Distinction**

From digital collections highlighting Linus Pauling to our institutional repository, OSU Libraries and Press' digital efforts showcase those collections and resources unique to Oregon State University. Additionally, as the only university press in Oregon, the OSU Press supports the continued intellectual, cultural and social development of Oregon and the West.

## **CHALLENGES**

While the OSU Libraries and Press have a number of strengths in key areas, there are substantial opportunities for improvement as well.

### **Expanding the Focus of Discovery**

As OSU Libraries and Press move forward, we are expanding the definition of discovery to include highlighting local collections, more closely integrating interlibrary loan and acquisitions processes, providing comprehensive data discovery services, and offering a more holistic search that can return contextual answers to a wide range of questions about OSU Libraries and Press resources.

### **Providing Input Into the Curriculum**

We will work across campus to create an instruction program that ensures students develop the tools to be successful at Oregon State University and in a knowledge-based economy.

### **Emphasizing the Faculty Librarian Scholar**

Sharing our expertise in organizing, curating, and disseminating information—especially in this time of changing modes of scholarly communication and swift increases in the volume of information available—is a critical area of improvement where OSU Libraries and Press faculty can be partners in the research enterprise.

### **Telling Our Story**

We must strengthen our connections with outside stakeholders. To be successful, OSU Libraries and Press will continue explaining the impact that we have on research and education across Oregon, and beyond, to campus stakeholders, donors and granting agencies.

## **NEEDS**

Several factors will continue to challenge the OSU Libraries and Press into the future.

### **Changing Skill Sets**

Changes in the information landscape and the library's role on campus require new training and expertise as we transition to digital-based services and environments. We must also strengthen our role as an information producer and publisher.

### **Transitioning Infrastructure**

As OSU Libraries and Press advance our digital mission, a strong information technology infrastructure will remain vital for maintaining the library's role as historian and record-keeper, as well as for developing new methods of access to digital collections.

### **Letting Go of the Past**

New technologies are changing the way in which libraries deliver information, support research, and curate and preserve collections. OSU Libraries and Press faculty have a tradition of developing innovative programs to support the learning and research process. However, we must be willing to reallocate resources when a program becomes unnecessary or obsolete. For the library to remain nimble, we must shift gears when necessary.

### **Adjusting to Changes in Funding for Higher Education**

While it would be naïve to ignore the role that economic pressures have had on OSU Libraries and Press, simply pointing them out is not enough. OSU Libraries and Press must respond by cultivating new funding opportunities. We have identified three challenges to overcome:

1. Dedicated Staff Time for Fundraising
2. Strengthening and Cultivating Support from Existing Partners
3. Identifying Potential Positions for Endowment

## **STRATEGIC ISSUES**

### **Competitive Research Environment**

In a highly competitive funding environment, researchers must have timely access to information to compete for research and grant funding. The library has to respond to their needs in a way that makes effective use of our services and resources throughout the research, writing, publishing, and preservation processes. Researchers will use our expertise to address changes in the grant application process.

### **Technology Landscape**

Complexities with supporting multiple platforms for patron interaction, mobile devices, e-books, and movement from print to digital resources all offer unique staffing and funding challenges that libraries must meet to remain viable. As more students use libraries virtually, OSU Libraries and Press must develop and sustain effective service and resource delivery systems.

### **Evolving Student Demographics**

Changing student demographics affect service delivery, collection development, learning needs, and use of resources. A growing number of students representing broader age ranges and demonstrating increasing diversity means that OSU Libraries and Press must respond by developing new and expanded services, resources, and approaches to teaching.

### **New Publishing Paradigms**

The OSU Press has a 50-year tradition of publishing scholarship of and about the Pacific Northwest. While its scope has allowed the press to prosper in an increasingly volatile publishing market, we must find a balance between traditional and new paradigms in publishing.

### **Growth of Open Access**

OSU Libraries and Press have taken a leadership role in educating the University community about Open Access issues. In the long term, the growth of Open Access will affect the costs of providing researchers with access to what they need.

## **Demands on Space**

Evolving models of teaching, learning, and research require flexible spaces and our users' success depends on access and availability of these spaces. As the Oregon

State University population grows, more space and resources will be needed for individual and group work within the Valley, Guin and OSU-Cascades libraries. Continuing to move from print to digital resources will open up physical space to accommodate increased emphasis on collaborative learning.

## **Need for Diversified Funding**

Funding continues to be a high priority in higher education. OSU Libraries and Press must actively diversify our revenue stream by increasing private and grant funding resources.

## **Telling Our Story**

As OSU Libraries and Press evolve, we must communicate these changes to patrons and stakeholders and demonstrate our value to the University. OSU Libraries and Press need to more broadly convey our impact on teaching, research, and community engagement.

## **Workforce Excellence**

As the roles of OSU Libraries and Press faculty and staff change, innovation and engagement must be supported to sustain a cohesive culture of excellence. We can achieve this through career workforce opportunities and departmental cross-training.

## **STRATEGIC GOALS**

### ***GOAL 1: REIMAGINE THE LEARNING AND SERVICE ENVIRONMENT***

OSU Libraries and Press will reimagine and implement dynamic physical and virtual spaces to respond to demand and evolving approaches to teaching and learning, scholarship, and professional development. We will continue to cultivate an innovative environment of learning and engagement that empowers students and faculty.

Responding to student needs for more collaborative space, the Valley Library made significant facility changes in implementing our previous strategic plan, including creating a dynamic Learning Commons. On-site library use has soared with gate counts increasing 24 percent between AY2008-09 and AY2011-12, and demand for additional space for collaborative and individual study has continued to rise. As university enrollment continues to grow, we anticipate space needs for students will become critical. Over the past five years, we have continued to move from print to digital and nearly 80 percent of current expenditures are for electronic resources. This rapid change in information format creates the opportunity to reimagine our spaces and create a facility that is on the cutting edge. We have also witnessed dramatic increases in the use of our virtual environment and must increase our capacity to respond to the needs of learners and researchers anytime, anywhere.

#### **Core Values:**

- Access
- Civility
- Service

#### **Strategic Issues:**

- Technology Landscape
- Evolving Student Demographics
- Demands on Space
- Competitive Research Environment

#### **Strategies**

##### ***1.1. Simplify the library experience.***

- a. Complete the co-location of service desks in the Valley Library.
- b. Redesign course reserves.
- c. Implement updated maps and other navigational systems for the Valley Library, including seat finding.

- d. Implement technology to enable students to find peers within the Valley library easily.
- e. Gather information from our users about their needs and experiences at both physical and virtual points of use.
- f. Examine the use of OSU data in order to tailor library services and resources. Use existing Oregon State University data in new ways to learn more about our users' experiences.

***1.2. Build a discovery experience that delivers content immediately and establishes the subject or discipline-specific contexts for information.***

- a. Pursue projects to provide greater student access to electronic textbooks.
- b. Fully implement purchase-on-demand (POD) and patron-driven acquisitions (PDA).
- c. Implement Primo as a replacement for 1Search, the existing unified search tool for all library resources.
- d. Realize staff efficiencies and improvements in access to resources as a result of migration to a shared ILS within the Orbis Cascade Alliance.
- e. Design and implement approaches for exposing and integrating library linked data on the web for improved access and discovery.

***1.3. Redesign physical space.***

- a. Encourage conversations with faculty and staff across campus regarding changing approaches to collections to create flexibility in physical environment planning.
- b. Redesign the Valley Library third-floor documents, microforms, and maps areas.
- c. Redesign the Valley Library fifth-floor Special Collections and Archives Research Center space to enable intensive interaction with the library's unique special collections.
- d. Create and maintain learning spaces relevant to users' needs.
- e. Renovate the Guin Library to enhance meeting, office, and collaborative workspaces.
- f. Partner with OSU-Cascades faculty, administration, and students to identify and address library space needs at the Cascades campus.
- g. Improve the usability of the Valley Library rotunda for library events.

***1.4. Support community and learning in virtual spaces.***

- a. Increase the accessibility of Special Collections and Archives Research Center virtual collections.
- b. Implement the Researcher's Toolbox, a focused Web application that provides users with discipline-specific context within finding aids and improves the accessibility of our digitized archival collections.

- c. Build campus partnerships to develop online environments to support OSU Learners.

***1.5. Create a forum that welcomes and engages all communities.***

- a. Implement routine Oregon State Press events in the Valley Library.
- b. Use the library's physical and virtual spaces to showcase the creative and intellectual output of the OSU Community.
- c. Develop programming to promote reading on the OSU campus.

***Measures of Success:***

- a. By comparing LibQUAL data from 2013 to LibQUAL data for 2016, the Libraries will see positive changes in user satisfaction ratings as the number of "perceived score less than minimum" will decrease and the number of "perceived score less than desired" will decrease.
- b. Comparison of August 2015 trunk tests (analysis of websites for navigability) to spring 2016 trunk tests for top library webpages will show a decrease in user confusion.
- c. By **AY2016**, OSULP will establish a baseline of co-sponsoring four events per year with campus units. A co-sponsored event (panel, individual speaker, etc.) features or highlights an issue, collection or area of expertise relevant to OSULP. Library co-sponsors will be individual departments and units or OSULP. Co-sponsored events in library spaces will meet or exceed the baseline every year. The OSULP department responsible for hosting the co-sponsored event will gather feedback about the event, either at the event or on social media. The department will then analyze that feedback from the event to demonstrate the impact it had on campus and the broader community. OSULP co-sponsoring units will also seek feedback to identify topics of interest for future co-sponsored events. Co-sponsoring units will also share a brief report to LAMP to be included in LAMP minutes or updates. Analysis can focus on:
  - Number of attendees;
  - Comments related to these events that relate to personal enhancement of teaching, research, or learning; or personal enhancement of civic engagement;
  - Willingness to recommend events to friends/colleagues;
  - Perceived willingness to attend another event.
- d. By **AY2017**, the amount of space devoted to individual and collaborative study in the Valley Library increases from 17 to 25 percent of the total building space; the additional study space supports targeted user groups whose needs for space are not met elsewhere on campus.
- e. OSULP develops a master space plan by **AY2017** that increases individual and collaborative study space; expands teaching/learning space; and creates innovative work and project space for residents of the Valley Library.





## ***GOAL 2: ENRICH ACADEMIC IMPACT AND EDUCATIONAL PROSPERITY***

OSU Libraries and Press will deliver a specialized educational experience focused on information literacy, the research process, and competency using tools for doing research. The educational experience will contribute to the growth and educational prosperity of Oregon State University students. We will accomplish this by maintaining a rigorous focus on academic excellence and overall student success. By providing enhanced educational opportunities shaped by the University's learning goals and students' readiness, experiences, and aspirations, we will prepare students to assume a meaningful role in the global community.

The evolving face of student and faculty populations, the staggering changes to educational delivery models, the growing need to bridge learning gaps of incoming student populations, and the fundamental demand for information literacy exerts new pressures on delivery of higher education. To prepare Oregon State University students for academic and workplace success, we will provide educational offerings that improve critical thinking, scholarly communication, data management, and engagement with the research enterprise—skills that are critical to student success. We will embed ourselves into the curriculum and initiate university-wide conversations about the future of learning, contributing to a more robust learning environment across campus.

### **Core Values**

- Access
- Service
- Diversity
- Collaboration
- Innovation

### **Strategic Issues**

- Technology Landscape
- Evolving Student Demographics

### **Strategies**

#### ***2.1. Develop new curricular offerings that expand our educational impact.***

- a. Secure a Library and Information Studies (LIB) designation in the course catalog, which will let library faculty fully participate in the University's educational mission.
- b. Collaborate with Ecampus, the University Honors College, and other academic units to offer courses that have a positive impact on student

- success and students' long-term pursuit of knowledge for personal or professional reasons.
- c. Apply library faculty research and expertise to inform, assess, and promote our educational impact.
  - d. Expand workshop and instruction efforts into new areas that support learner success, scholarly excellence and engagement.

***2.2. Deliver experiential learning opportunities in conjunction with the University's learning goals.***

- a. Build an OSU Libraries and Press experiential learning and internship program for both graduate and undergraduate students.
- b. Develop tools that measure experiential learning outcomes.

***2.3. Initiate campus conversations to embed our expertise across the University's curriculum and enrich OSU's educational mission and the student experience.***

- a. Design and develop activities to stimulate conversation and action on emerging topics such as the future of the undergraduate research paper, data management, and competency-based education in higher education.
- b. Create incentives for Oregon State University faculty and graduate students to restructure current courses, assignments, and instructional materials to more fully integrate library and information science (LIS) content.
- c. Lead task forces and committees driving campus-wide initiatives related to creating a transformative education experience for OSU students.
- d. Increase library faculty participation on graduate student committees, thesis committees, and other educational service opportunities.
- e. Lead campus conversations about copyright and fair use.

***2.4. Target specific student populations and university performance outcomes where we will have the greatest impact.***

- a. Develop programming for traditionally underserved and high achieving students.
- b. Reach out to international partners, students, and campus organizations to reduce barriers to learning and access.

***Measures of Success:***

- a. By **AY2017** OSULP teaching faculty, in partnership with other campus units, develops one new credit course per year to be included in the Library's curriculum.

- b. By **AY2017** OSULP develops, offers, and assesses 1-2 new workshops per year on emerging or developing topics relevant to student success and/or researcher effectiveness.
- c. By **AY2016** OSULP creates and fills an OSULP internship coordinator position.
- d. By **AY2017**, OSULP articulates and assesses learning outcomes for all for-credit or paid OSULP internships and tracks student mastery of these outcomes centrally.
- e. By **AY2017**, OSU faculty recognize the value of the of the Libraries' instructional program to student success in their responses to a triennial survey to faculty. See the Goal 4 measure related to the triennial survey about establishing a baseline.
- f. By **AY2017**, OSULP includes a requirement to develop and implement instruction and programming for traditionally underserved populations in all new teaching librarian positions.



### ***GOAL 3: PLAY A FUNDAMENTAL ROLE IN KNOWLEDGE CREATION AND DISSEMINATION***

OSU Libraries and Press will act as a partner and adviser, using our experience and resources to transform scholarly communication within the University. We will work with our communities to promote Open Access to scholarly communication and shift our focus from being gatekeepers of information to being collaborators in the creation and dissemination process.

As a trusted repository, we will curate the intellectual output of the Oregon State University community, working with other campus units to provide the tools and infrastructure necessary to support the entire life cycle of that data including selection, certification, maintenance, preservation, discovery, and long-term access. Our digital publishing and Open Access initiatives will explore new modes of knowledge dissemination to enhance academic discourse by removing barriers related to access and cost. The research of library faculty will inform this process by investigating new scholarly communication models, creating innovative tools and services, and measuring our effectiveness.

#### **Core Values:**

- Access
- Collaboration
- Preservation
- Innovation
- Sustainability

#### **Strategic Issues:**

- New Publishing Paradigms
- Growth of Open Access
- Competitive Research Environment
- Technology Landscape

#### **Strategies**

##### ***3.1. Partner with researchers to optimize effectiveness and visibility of scholarship.***

- a. Increase data management activities and outreach.
- b. Develop new metrics, methods, and tools for measuring and tracking the impact of scholarship.
- c. Champion the adoption of a university-wide Open Access policy.
- d. Promote the value of Open Access to researchers, students and alumni.

- e. Educate and provide assistance to the OSU community about federal and state agency requirements and legislation pertaining to Open Access and related scholarly communication issues.

### ***3.2. Accelerate and support research by library faculty.***

- a. Articulate and showcase the research interests and expertise of individual library faculty members to facilitate internal and external research collaborations.
- b. Pursue grants for library research projects.
- c. Provide research infrastructure and funding opportunities to strengthen library faculty research activity.

### ***3.3. Develop knowledge creation and dissemination opportunities.***

- a. Identify partners within the Oregon State University community and within the academic library community to explore Open Access publishing tools or platforms.
- b. Develop partnerships with campus stakeholders to reduce the cost of textbooks and other educational materials.
- c. Experiment with new delivery models for OSU Press publications.
- d. Promote use of the Libraries' unique collections as sources for knowledge creation.
- e. Partner with interested campus groups to record and disseminate the history of Oregon State University.

### ***3.4. Pursue new economic models related to scholarly publication and support for university signature areas.***

- a. Identify and advance alternative publishing models and funding for digital publishing.
- b. Develop additional funding sources to support signature collections.
- c. Advocate for faculty to engage in new publishing models.

### ***3.5. Create a robust and flexible digital preservation and curation infrastructure.***

- a. Partner with campus stakeholders to create a long-term preservation system for university scholarship and digital collections developed and curated by OSU Libraries and Press.
- b. Identify, prioritize, and preserve the collections of distinguished scholars within the Oregon State University community.
- c. Partner with academic units and campus computing to build and support research data management and storage solutions.

## ***Measures of Success***

### **Strategy 3.1**

- a. By **AY2017**: A dedicated research data portal is available at ScholarsArchive@OSU with enhanced features for discovery, curation, and ingest. (Strategy 3.1a)<sup>1</sup>
- b. By **AY2017**: Analytics including web usage, download statistics, and citations are available for academic units, colleges, authors, and individual items at the point of need in ScholarsArchive@OSU. (Strategy 3.1b)<sup>2</sup>
- c. By **AY2016**: At least 50 percent of scholarly articles published by OSU faculty and indexed by Web of Science are deposited to ScholarsArchive@OSU. (Strategy 3.1c and d)<sup>3</sup>
- d. By **AY2016**: Center for Digital Scholarship and Services deposit services are in place that meet new federal agency article deposit implementation plans. (Strategy 3.1e)<sup>4</sup>

### **Strategy 3.2**

- a. By **AY2017**: ScholarsArchive@OSU is browseable by subject, department, college, and author. (Strategy 3.2a)
- b. By **AY2016**: Three grant proposals for library research projects are submitted to state and/or national funding agencies or organizations.
- c. By **AY2017**: Five grant proposals for library research projects are submitted to state and/or national funding agencies or organizations. (Strategy 3.2b)

### **Strategy 3.3**

- a. By **AY2017**: OSULP identifies specific platforms to support the following types of publications: 1) online supplemental materials for OSU Press books; 2) reprints (in POD and/or EPUB formats) of special collections and Press content; 3) OSU faculty-initiated scholarly works. (Strategy 3.3a)

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<sup>1</sup> Baseline as of October 2015: Data curation capacity is available but limited with current repository. Limited infrastructure is available for storing, backing up and preserving research data.

<sup>2</sup> Baseline as of October 2015: Altmetrics are available for faculty articles. Downloads are available for items, collections and communities.

<sup>3</sup> Baseline as of July 2015: 44% of scholarly articles published by OSU faculty and indexed by Web of Science are deposited to ScholarsArchive@OSU.

<sup>4</sup> Baseline as of October 2015: Deposit services are in place for NIH and Department of Energy, the only two agencies to have published implementation plans for their public access requirements.

- b. By **AY2016**: OSU Libraries and Press programs supporting the use of Open Education and library licensed resources in place of student-purchased textbooks result in student savings of \$500,000. (Strategy 3.3b)
- c. By **AY2016**: All new OSU Press publications are available in print and digital formats to extend access to significant scholarship, especially distinctive works about Oregon and the West. OSU Press is able to be more strategic in its decision-making about the initial format chosen to respond to market conditions or demand (electronic, POD, or print). (Strategy 3.3c)
- d. By **AY2017**, SCARC will have experienced an average 5 percent increase in onsite researcher visits for use of its unique collections. (Strategy 3.3d)<sup>5</sup>

### **Strategy 3.4**

- a. By **AY2016**: Upon completion of pilot OA Fund project, OSULP determines sustainability of long-term funding for this type of OA author support. (Strategy 3.4a)
- b. By **AY2016**: As a result of our advocacy, innovation, and educational efforts, researchers and scholars adopt more open access publishing and dissemination strategies. (Strategy 3.4c)<sup>6</sup>

### **Strategy 3.5**

- a. By **AY2017**: A digital preservation policy and implementation plans are in place that model the curation of resources developed, housed, and maintained by OSU Libraries and Press. (Strategy 3.5a and c)<sup>7</sup>
- b. By **AY2016**: Internal and external digital preservation resource needs are identified. (Strategy 3.5a and c)
- c. By **AY2017**: As a result of increased outreach and recognition of Special Collections and Archives Research Center services, an increased number of OSU Distinguished Professors' papers are preserved. (Strategy 3.5b)

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<sup>5</sup> Baseline: 741 researcher visits during the 2014-15 academic year.

<sup>6</sup> Baseline: Can determine percentage of OSU faculty articles that are open access for last five years. Won't be able to easily determine whether an increase is a result of our efforts without a baseline survey that covers some of these areas (see also 3.5b measure for example).

<sup>7</sup> Baseline: Digital Preservation Policy established October 2015. Size of digital collections have outgrown our capacity for offsite backups.



## ***GOAL 4: SUSTAIN AN INTENTIONAL AND INCLUSIVE ORGANIZATION***

With communities of users that are constantly evolving and diversifying, OSU Libraries and Press will strive to reflect our users' diversity while building a culture of excellence and civility.

We will respond to our stakeholders' needs, prepare ourselves for new roles and be accountable to those who support us. We will rigorously gather, analyze, and synthesize evidence about what we do and what our users do and use that evidence to make clear decisions and confidently tell our story. We will communicate internally and externally: why and how we collect evidence, how we use it to inform decisions, and what it shows about our impact. This intentional process will allow us to sustain a culture that is transparent, respectful, innovative, and inclusive.

### **Core Values**

- Civility
- Service
- Diversity
- Collaboration
- Sustainability

### **Strategic Issues**

- Workforce Excellence
- Telling Our Story
- Changing Demographics

### **Strategies**

#### ***4.1. Build capacity across the OSU Libraries and Press.***

- a. Support and acknowledge professional development activities, including short-term developmental opportunities and skill building with practice.
- b. Practice and advocate for civility through daily interactions.
- c. Increase the diversity of the OSU Libraries and Press workforce.
- d. Promote work life balance for library faculty and staff.

#### ***4.2. Make OSU Libraries and Press evidence accessible to our communities.***

- a. Develop library-wide policies and processes to ensure user data is collected and shared ethically and appropriately.
- b. Preserve and make accessible our white papers, professional reports, and assessment projects.

- c. Develop skills to collecting, analyzing, use and present evidence in meaningful ways.

#### ***4.3. Intentionally promote our services, resources, and successes.***

- a. Hire a marketing and communications coordinator.
- b. Develop a cohesive communications and marketing plan in order to consistently communicate our stories to the Oregon State University community and beyond
- c. Capture and share our users' stories to illustrate our impact with students, faculty, and the broader community to share with our stakeholders.

#### ***Measures of Success***

- a. By **AY2017**: OSULP has created and initiated a triennial survey to establish a baseline for evaluating the impact that our resources, collections, and services have on the OSU community. See measure related under Goal 2.
- b. BY **AY2016**: Every OSULP staff and faculty receives support to attend events or participate in training that expands understanding or advances equity, inclusion, diversity, and civil and social justice. Department heads and supervisors will work with employees to determine best opportunities and track this participation internally.
- c. BY **AY2017**: Students, staff, and faculty employed in the Libraries and Press receive support and encouragement to maintain or increase their annual participation in relevant external and internal workshops, seminars, or pre-conferences identified as important for their professional development. Department heads and supervisors will work with employees to determine best opportunities and track this participation internally.
- d. By **AY2017**, OSULP conducts a workplace environmental survey to better understand staff perceptions of our organizational climate and diversity.
- e. BY **AY2016**: Coordinated communication efforts further awareness of the Libraries and Press's value, expertise, and unique contributions to the University and external stakeholders. A communications specialist is hired to coordinate external (to OSULP) communications efforts; a new OSULP annual impact report is created; and the specialist tracks coverage in the media generated by news releases.
- f. By **AY2017**: Donor and Central University Administration support for strategic initiatives of the Libraries and Press increases.
- g. By AY2016, OSULP establishes baselines for diversity for all employee categories and documents its recruitment efforts.
- h. By **AY2017**: Directed recruitment practices and strategies diversify the applicant pools for student, staff, and faculty positions, leading to a more diverse workforce.

## **THE STRATEGIC PLANNING PROCESS AND STAKEHOLDER GROUPS**

The OSU Libraries and Press Strategic Planning Committee began working with consultant Tom Dowling in May 2012. The Strategic Planning Committee was charged with creating a plan that would articulate OSU Libraries and Press' strategic direction for the next five years. The group's major objectives were to identify strategic issues and environmental factors that will impact research libraries and university presses, solicit feedback from a diverse group of stakeholders, develop and embed measures of success for goals and strategies, and align our strategies with the strategic initiatives of Oregon State University. Our goal was to develop a plan that set high aspirations for how OSU Libraries and Press would address our strategic issues as well as support Oregon State University's goal to become a top ten land grant university.

The committee informed itself through relevant literature, conducted an environmental scan to identify issues and trends and assess strengths, challenges, and opportunities, and engaged with stakeholders to contribute input about the strategic directions we must pursue. Because stakeholders are critical to OSU Libraries and Press' long-term success, the committee sought input from internal and external stakeholders throughout the planning process. Stakeholder groups included:

- Undergraduate and graduate students, OSU Libraries and Press student workers and student leaders from multiple organizations, including Associated Students of Oregon State University (ASOSU), International Students of Oregon State University (ISOSU) and the Graduate Student Union
- OSU Libraries and Press faculty and staff
- Associate deans of research from the Advisory Group for the Vice President for Research
- Graduate School administration
- Undergraduate Education Council members
- Faculty Senate Library Committee members
- Leadership teams from Academic Affairs, Student Affairs, International Studies, Information Services, OSU Press Editorial Board and the Division of Outreach and Engagement
- OSU Libraries and Press Advisory Council, the principal volunteer leadership group whose membership includes distinguished alumni and friends

Stakeholders are the heart of OSU Libraries and Press' services and mission. Many have chosen Oregon State University for their education, research, and employment. We serve all students including undergraduates and graduates on and off campus. We also support the faculty who teach and produce scholarship. Our stakeholders include significant supporters and advocates for OSU Libraries and Press, including university administration, donors, friends, parents, and alumni. They are also established collaborators or represent future strategic partners. A series of focus

groups with stakeholders, held in June 2012, figured prominently in shaping the plan's development. Working in four writing teams, the committee used the responses collected and analyzed from the focus groups to draft an initial plan.

OSU Libraries and Press' greatest resource is its employees. This includes full- and part-time faculty and staff, student workers, interns, and grant-funded staff who will be called upon to commit their creativity, energy, and expertise to successfully launch and implement new strategic initiatives. In August 2012, this early draft was vetted in an open meeting inviting OSU Libraries and Press faculty, staff, and student workers to interact with committee members, pose questions about the draft's components, and provide comments. The draft of the plan was also available online for all personnel to review and provide comments and suggestions.

Using this critical feedback from OSU Libraries and Press faculty and staff, the writing teams revised the plan again in preparation for external reviews scheduled in September and October 2012. Stakeholder groups representing faculty leaders, university administrators, and donors, as well as graduate and undergraduate students participated in multiple review sessions led by pairs of committee members. The focus of these sessions was to clarify mission, vision and values, prioritize issues and challenges, and seek further insight about goals, strategies, and actions as well as assessment measures. The committee incorporated input from these groups to finalize the strategic plan in November 2012.

Overall, the OSU Libraries and Press strategic planning process demonstrated the committee's commitment to collaboration, reflection, and analysis and open engagement with multiple communities. The process strengthened partnerships within our organization and across campus. Subsequent drafts improved on the previous iteration as the committee focused our resources on four major goals and outlined ways to assess the achievement of our objectives. The final plan reflects the committee's successful effort to establish a dynamic direction for OSU Libraries and Press over the next five years.

## **STRATEGIC PLANNING COMMITTEE**

|                      |   |
|----------------------|---|
| Laurie Bridges       | Instruction and Emerging Technologies Librarian                           |
| Faye A. Chadwell     | Donald and Delpha Campbell University Librarian and<br>OSU Press Director |
| Anne-Marie Deitering | Franklin McEdward Professor for Undergraduate<br>Learning Initiatives     |
| Kerri Goergen-Doll   | Resource Acquisition and Sharing Manager                                  |
| Tom Johnson          | Digital Applications Librarian  |
| Dean Jones           | Unix Administrator  |
| Jessicca Lawhead     | Interlibrary Loan Coordinator   |
| Terry Reese          | Gray Family Chair for Innovative Library Services                         |
| Trevor Sandgathe     | Special Collections and Archives Library Technician                       |
| Steven Sowell        | Collections and Resource Sharing Department Head                          |
| Rick Stoddart        | Assessment Librarian  |
| Janet Webster        | Head Librarian, Marilyn Potts Guin Library                                |
| Evviva Weinraub      | Director, Emerging Technologies and Services                              |
| Tom Dowling          | Facilitator/Consultant, College of Business                               |
| JoLynn O'Hearn       | Administrative Assistant  |