Strategic Plan 2018-23
Oregon State University Libraries and Press

Version May 15, 2019

I. Preamble

The previous Strategic Plan (2012-17) for Oregon State University Libraries and Press (OSULP) garnered an official compliment from the visiting onsite evaluation team for the Northwest Commission on Colleges and Universities, the regional accrediting agency for OSU. This recognition acknowledges that strategic planning is a strength of our organization. OSULP still proceeded to work on and improve its processes for the next period covering 2018-23. We're proud of adopting an even more inclusive process than previously utilized.

Representatives from across the organization comprised the OSULP Strategic Planning Committee (Appendix B). Their leadership in directing broad participation ensured that classified staff and faculty members throughout the Libraries and Press had multiple opportunities to provide input during various stages of the planning process (Appendix C).

There are a myriad of ways that OSULP could move forward to shape our future and have meaningful impact. This Strategic Plan charts the four broad goals that we identified for our focus in the next 3-5 years:

1. Excellence in services and personnel
2. Durable collaborations
3. Continuous improvement and experimentation
4. Responsible stewardship of critical resources

We'll emphasize several important internal and external priorities that we expect to evolve. To determine these priorities, it was imperative that we scrutinize trends as well as challenges affecting research libraries and university presses and higher education in general. We describe several significant threats and opportunities in Appendix A, but here are a few that influenced our priorities:
- Higher education in the U.S. has experienced a steady change in student demographics for the last decade. More women, students of color, online distance education learners, veterans and international students are enrolling at universities like OSU. Even while more doors are opening to a more diverse student body, many students face considerable debt upon graduation. Accompanying the changing demographics are changing expectations both from students (and their parents) as well as state legislatures about affordability, flexible access to courses and learning materials, institutional accountability related to enrollment and graduation rates, and the quality of the overall educational experience.
- Academic and research libraries continue to seek ways to optimize library spaces formerly allocated to housing journals and books. Building on the clear enthusiasm that students have shown for our collaborative learning spaces, we'll continue to contribute to academic success initiatives at the university. Our contributions will require ongoing assessment and continuous improvement of our facilities, collections and services.
- OSU Libraries has already converted significant print resources to digital formats, even while facing perpetual budget constraints because of persistent, unrealistic

inflation in the commercial academic journal publishing market. Flagging government investment in the research enterprise as well as in higher education only intensifies fiscal challenges. Higher education must identify new revenue streams and perhaps rely on fundraising efforts more than ever.

- The transition to online content is only part of a broader worldwide emphasis on digital scholarship. This landscape encompasses so much: the use of productivity software, 3-D printing, data literacy and scholarly publishing support, data security and privacy. A search of any number of search engines yields more data, information and resources than any single library can acquire and manage. Navigating the digital scholarly landscape requires the recruitment and retention of faculty and staff with specialized skills, and these workers need to be well-compensated and supported via professional development opportunities.

It is essential that OSULP's goals and strategies align with those of Oregon State University's Strategic Plan 4.0. The university's plan articulates Oregon State's vision to be a leader "among land-grant universities in the integrated creation, sharing and application of knowledge for the betterment of humankind."

Our alignment with the university's Strategic Plan is demonstrated best through the actions that OSULP departments will undertake to implement their individual work plans. Selected departmental actions are included in this document, and full details of departmental plans are available online. These acknowledge the distributed and unique contributions that all departments will make to the subsequent success of the entire organization. They provide a glimpse of our shared commitment to creating and delivering the very best programs, services and scholarly content to benefit our principal stakeholders: OSU's students and faculty.

As a part of a top-tier land grant institution engaging on local, state, regional, national and global playing fields, OSULP also serves a wider community. Several OSULP units extend the university's teaching, research and outreach mission beyond Oregon State University's main campus in Corvallis. The Guin Library in Newport, Oregon is an integral part of the Hatfield Marine Science Center, a leading international marine laboratory that hosts research and education programs from OSU's colleges and multiple state and federal agencies. After nearly six decades of publishing, Oregon State University Press continues to document the intellectual, cultural, and social development of Oregon and the West. The Special Collections and Archives Research Center curates the Libraries' distinctive and unique collections in several signature areas of interest for scholars near and far.

A strategic plan guides daily work, focuses energy and resources, provides a means for evaluating progress, and determines an organization's appropriate audiences. Understandably, an important audience for this Strategic Plan is the campus community with whom we engage. That engagement will need to be ongoing because we expect to adapt to change and gain additional insight that will influence any strategic planning and implementation that we pursue. OSULP classified staff and faculty members are the other primary, perhaps less obvious, audience for this plan. They will be the source of our innovation and creativity, resourcefulness and reflection that drive the successes that we achieve.

A strategic plan offers an overall sense of direction. We've sought to be "a front runner among research libraries and university presses" and achieve distinction in our practices, services and programs. That outcome remains both lofty and admirable, but with this plan,

we also want to capture all the essential day-to-day work that's necessary to be a leader among peers.

As we were completing our planning process, I was reminded of a gift from a retiring library dean with whom I had worked earlier in my career. The gift, offered to all my colleagues, was a tiny, handmade book with this simple exhortation: "Make progress every day." What a potent reminder that the work of a research library or a university press is never done. We can and do make advances, and sometimes they come in leaps and bounds, but more often they occur incrementally, yielding subtle changes that lead to the eventual realization of outcomes.

Make progress every day. While encouraging daily diligence has its merits, this bidding is best applied in the context of a robust yet flexible strategic plan. Such is the 2018-23 Strategic Plan for Oregon State University Libraries and Press, a plan that establishes our intent to be a resource for communities seeking our unique expertise and skills and a center for learning and scholarship at Oregon State University.

Faye A. Chadwell
The Donald and Delpha Campbell University Librarian

II. What Do We Mean by "Strategic"?

A. This Strategic Plan is designed to guide our work over the next five years and provide foundation, aspirations and ways to prioritize. But a strategic plan is not all that is required for OSULP to respond strategically to the challenges and opportunities we see now and those that will rise in that five-year period. A strategic plan is a snapshot of our current best thinking about how we want to move forward. It is also a living document that will be used, and amended, as we move through the next five years. It is intended to support us in thinking strategically as we make the multitude of decisions that we will need to make in those years — and evaluating how well we've done when we're looking back at them.

B. Thinking strategically means making our choices in ways that are reflective and mindful. It means actively using the framing provided by this Strategic Plan as a filter for how to focus our resources, and using it to choose what we will and will not do. Thinking strategically also means making decisions contextually, considering what our experience has been and what the longer-term impacts of a given decision will be, and communicating clearly and regularly with our communities. It also means thinking about ripples: considering what else any given decision is connected to, what we have to say "no" to in order to say "yes" to something else, and what we will be asking of others if we take this action.

C. Implementation of this plan will include the development of strategic work plans for each department using a facilitated, integrative approach. The high-level actions that grow out of the goals and priorities articulated here will be fed back into the plan as the Actions section. Regular opportunities for reflection and reprioritization will be part of the ongoing work — at the department level and the OSULP leadership level — and will be done OSULP-wide at least twice during the five years of the plan. We intend for this plan to evolve as we experiment and reflect and in response to new challenges and opportunities.

D. At OSULP, we do not believe that there exists a strict division between work that is strategic, innovative and new, and the ongoing work that it takes to ensure the quality, stability and health of our core services. To be strategic, we must critically examine our current practices, and do what's needed to improve our systems, collections, services and spaces so that they meet the needs of our communities now and into the future. We must also commit the resources needed to support this ongoing work. Our work is grounded in enduring values and focused on providing excellent library services to our communities. To take advantage of the opportunities and rise to the challenges that come our way in the future, we must be willing and able to experiment with new workflows, platforms, perspectives and approaches to enacting our core values. The goals that you see articulated in this Strategic Plan are focused on developing, nurturing, and using well the resources, capacity, expertise, flexibility and relationships that we need to do this essential work.

III. Mission and Vision

Mission:

The OSU Libraries and Press cultivate excellence in scholarship and creativity, empower discovery, and preserve and disseminate knowledge. Our work is rooted in our commitment to openness, inclusion, equity and diversity. We advance OSU's mission by contributing to learning success, scholarly excellence and community engagement, and by respectful and proactive stewardship.

Vision:

The OSU Libraries and Press will be at the center of learning and scholarship at Oregon State University. As a resource for our communities, we will provide tools and expertise to support academic success. In support of this, we will reach across boundaries, bridge gaps, and break down silos to encourage curiosity-based engagement and create learning opportunities.

IV. Strategic Goals for 2018-23

1. Emphasize High Quality Services and Expertise

a. At OSULP, we are deeply committed to service, which we define broadly and proactively. This commitment informs our users' experiences of our physical and virtual spaces as well as our teaching, scholarship and publishing. We will continue to create a user experience that is welcoming, inclusive, inspiring, comfortable and productive.

b. We contribute a unique combination of skills and expertise to our communities. Our services are stronger when they're grounded in that expertise and when we can use what we know to support our communities. We'll focus our energy on finding ways to apply our expertise to help the members of our communities to accomplish their goals and enrich their lives.

2. Build and Strengthen Relationships

a. At OSULP, we believe that our contributions to our communities and to our professions are rooted in the relationships that we build. As a library and press, we occupy a unique place in the university, and one that allows us to reach across disciplinary boundaries and organizational structures. More than any other unit at this university, we can bring people together, bridge gaps and break down silos.

b. We aspire to ground our work in maintaining user privacy while increasing accessibility, openness and inclusion. We will find opportunities to lead by bringing individuals and groups together to work on important issues. We will build relationships across the state and beyond, to support OSU's land, sea, space, and sun grant missions. We will use our professional relationships to build our expertise, expand our programs and increase our impact. We will engage our communities in co-creative projects to improve our services and spaces, and enrich our users' experiences.

3. Reward Experimentation and Support Continuous Improvement

a. At OSULP, we take pride in finding creative solutions to complex challenges. To succeed, we cannot be afraid to fail. We will create structures to reward excellence and experimentation at all levels of the organization, and to collect and use the lessons learned from trial and error. We will build support for iterative development, research and testing, and emphasize habits of transparency, mindfulness and critical reflection in our work and planning.

4. Practice Active and Respectful Stewardship

a. At OSULP, we are committed to supporting, preserving, sharing and honoring the cultural and intellectual output of our communities and the universe of information. As an

organization, we must also take care of the people that make us who we are by nurturing healthy work environments, work-life balance and opportunities for growth and learning. So, too, must we deliberately and wisely steward the physical, digital, economic and natural resources entrusted to us.

b. Respectful, ethical, and active stewardship is rooted in listening, in deepening and honoring relationships, and in responding proactively from the foundation of our mission, vision, values, experience and expertise. We will listen to our communities — both internal and external — with open minds, and use what we find to continue building OSU Libraries and Press into a place where people can do extraordinary work. We will strive to balance the needs of the present with the needs of the future, such that we respond nimbly, flexibly and vigorously to existing challenges and opportunities while building a strong Libraries and Press for the future.

V. Proposed Priorities

A. Internal Priorities

1. Clarify decision-making roles and processes within the Libraries and Press in support of better transparency, more effective delegation, and greater participation and collaboration both within and across departments.

2. Build a culture and structures that emphasize and reward experimentation, reflective practices and mindfulness.

3. Emphasize equity, diversity and inclusion in hiring and retention at all levels of the organization, so that we become, over time, more reflective of the diversity of the communities that we serve.

B. External Priorities

1. Optimize the library experience in support of learning success, scholarly excellence and community engagement.

This will include, but not be limited to: maximizing the capacity of our facilities for learning and work; ensuring that our spaces are safe and inclusive; removing barriers to access our resources and the resources of OSU; and co-creating learning spaces with our users.

2. Strengthen equity, diversity and inclusion in our organization, on campus, in the community and in our professional communities.

This will include, but not be limited to: focusing our resources, expertise and knowledge in support of larger OSU efforts to address these issues; identifying communities underserved by OSU Libraries and providing the resources necessary to improve their access and use; continuing to build collections that represent diverse experiences and complicated issues; and identifying missing voices in all of our collections and developing ways to address that.

3. Develop, demonstrate and support best practices for data management, preservation, accessibility and privacy across campus.

This will include, but not be limited to: advocating for privacy in student data policies; collaborating with researchers on developing best practices for data management throughout the research life-cycle for open data; and the creation and preservation of digital objects within OSULP.

4. Pursue solutions that will support publishing, distribution and collection models and relationships that are flexible, affordable, accessible and sustainable for users and creators.

This will include, but not be limited to: advocating for open when it makes sense, and excellence and affordability always; and guiding our communities through the complex systems of publishing and distribution.

5. Use direct and indirect strategies to help make college more affordable for undergraduate and graduate students.

This will include, but not be limited to: creatively building collections to give our communities access to the resources that they need; working with campus partners to connect learners to these and other campus resources; identifying ways to reduce or eliminate fees and fines; identifying, creating and sharing low- and no-cost alternatives to course materials; and wherever possible, sharing and supporting open tools with an eye to how learners will access information after they leave Oregon State.

VI. The Path to Progress

The strengths of our strategic planning reside in departmental-level work plans as well as in this Strategic Plan. Below are concise highlights of unit work plans by department. For more detailed snapshots of individual unit plans, see Appendix E. To obtain the current and complete versions of unit work plans, contact Don Frier at don.frier@oregonstate.edu or 541-737-4633.

Highlights include:

ADMINISTRATION
Provides oversight for OSULP's strategic planning, resource and personnel management, fundraising, and directs overall operations

- Build an infrastructure to support the creation, delivery and assessment of experiential learning opportunities in all OSULP units.

- Identify strategies and actions for advancing OSU's strategic goals of equity, diversity and inclusion (EDI).

ASSESSMENT
Collaborates across OSULP to assess the quality of OSULP programs, services and collections

- Develop, pilot and implement a library satisfaction survey.

EMERGING TECHNOLOGY AND SERVICES

Maintains OSULP's evolving, robust and flexible technological infrastructure and supports exploration, discovery and knowledge creation

- Broaden the impact, heighten the user experience and improve the performance of Oregon Digital.

- Implement OSULP's digital preservation plan to ensure the continuity of our unique online content.

GUIN LIBRARY
Provides library services and collections to support Oregon State University's Hatfield Marine Science Center in Newport

- Explore creating new user spaces to facilitate collaborative and group work.

- Create a more usable collection through expanded discoverability of local resources.

LIBRARY EXPERIENCE AND ACCESS DEPARTMENT
Addresses evolving user needs through access to proactive and flexible services and spaces

- Conduct peer tech training workshops in the Learning Commons to address common problems (such as making graphs and charts) that students encounter when using Microsoft Office products.

- Conduct discussions with key stakeholders about eliminating fines and offering alternatives (such as the food for fines campaign).

OREGON STATE UNIVERSITY PRESS
Advances knowledge of Oregon and the Pacific Northwest through the publication of significant trade and scholarly books

- Continue to publish books by authors from diverse and underrepresented communities to promote equity and inclusion.

- Implement press-wide database to make publishing operations more efficient and to improve departmental communication.

RESOURCE ACQUISITION AND SHARING
Provides user access to a broad range of information resources available 24/7 through perpetually changing options to purchase, lease and link to library material

- Determine the ability of OSULP to support the discovery of material located in OSU's seven cultural resource centers.

  o Ensure that access to online content has as few barriers as possible.
  o Review content provider Voluntary Product Accessibility Templates (VPATs) for compliance with accessibility standards.

- Evaluate the current level and depth of diversity represented in the OSU Libraries' general collection.

     o   Work with book vendors and update purchasing criteria to incorporate more diversity in content and authors.

SPECIAL COLLECTIONS AND ARCHIVES RESEARCH CENTER
Home to the university's unique collections of manuscripts, archives, photographs and books

- Offer opportunities for students to engage with primary source materials through experiential learning and instruction.

- Ensure the long-term preservation and accessibility of archival materials through secure, efficient and appropriate facilities that meet professional best practices.

- Seek and acquire archival collections that further learning and research, and enable discovery of those materials.

TEACHING AND ENGAGEMENT DEPARTMENT
TED connects community members to information in the library and beyond and inspires enthusiasm for learning and research

- Build a new classroom in the Valley Library that promotes multiple modalities of teaching and learning.

- Create learning goals for data literacy to support learners' abilities to understand, work with and present data.

Appendix A — Strategic Landscape
Strategic Landscape: Opportunities and Threats

In February 2018, Oregon State University Libraries and Press participated in a university-wide effort to articulate goals and strategies for the next fiscal year. The main outcome of this effort was to map goals and strategies to available resources. This exercise required units to identify opportunities wherein OSULP could enhance our services, collections and programs while advancing the university's mission. Units were also asked to identify threats to maintaining or providing current service levels.

OSULP defined multiple issues in its strategic financial plan. These are included here along with additional opportunities and threats generated during the Strategic Planning Committee's retreat. This analysis links these opportunities and threats to relevant goals and/or priorities within the Libraries and Press Strategic Plan and also within the university's Strategic Plan 4.0.

Threats

Storage. The Valley Library faces an immediate space crisis caused by the imminent demolition of our off-site storage facility (behind Kerr Administration Building), and the urgent need to replace our high-density shelving system. Given that learning spaces in Valley and Guin Libraries are already at a premium, this is an urgent threat.

Space. The Valley Library has been consistently rated by students as the "Best Place to Study" on campus — even as increases in student FTE have placed new pressures on library spaces. Student study areas are full during midterms and finals, and study rooms are routinely booked out in advance. Since 1999, the Ecampus unit, also housed in the Valley Library, has grown dramatically and placed additional pressures on available space for student use. To respond to increased demands on spaces and services and do regular building maintenance requires reliable support and collaboration with campus space planning as well as facilities units.

Serials Crisis. Regular inflation in the journal publishing market strains academic library budgets to such an extreme that the situation is routinely called a "crisis." To maintain our existing collections, OSULP's collection budget needs to grow by approximately 5 percent annually to keep up with inflation. While budget increases will allow OSULP to meet short-term needs, the underlying issue still exists. With large publishers like Elsevier seeking to control more of the journal publishing cycle, the threat is growing. Libraries need faculty and administrative support to stand up to publisher demands and negotiate fair deals and/or opt for reduced access to bundled publisher packages. Administrative support for inter-institutional responses to this crisis is required to leverage the buying power of research institutions.

Affordability. The high cost of learning materials, particularly textbooks, has a clear negative impact on student success and persistence. Students routinely turn to the library to access materials they cannot afford, and OSULP proactively collects

and promotes resources to meet these needs. As the cost of higher education continue to rise for students, and federal financial aid fails to keep up with demand, the pressures on library resources will continue to grow.

Federal Actions. Oregon State University relies on federal funding to support research. The university must also comply with a host of federal regulations that have direct and indirect impact on library services and programs.

- Cuts to federal funding for scientific research will have an immediate effect on the OSULP collections budget. In addition, the proposed elimination from the federal budget of funds for the Institute of Museum and Library Services would have a direct effect on library resources and on OSULP's ability to seek outside support for initiatives.
- The recent repeal of net neutrality regulations will have a significant impact on research libraries nationwide, which rely on fast, reliable broadband services to deliver information and provide services. If OSULP users are forced to find alternatives to commercial internet service providers (ISPs), the demand on OSULP's technology infrastructure could grow.

Salaries, Workload and Work Environment. OSULP faculty salaries remain among the lowest at Oregon State University although our faculty have been recognized several times for scholarly productivity. OSULP has not received new positions in response to significant growth in student and faculty FTE. Since the current faculty is extended beyond its ability to maintain existing services, retention is an issue. Largely as a result of lower than average salaries, OSULP has struggled to recruit librarians with specialized skills and experience beyond the entry level to develop new library services.

- These issues are just as pressing for classified staff and perhaps have an impact on turnover within this employee category. In the Libraries' Emerging Technologies and Services department, the salaries for web developers and computer programmers are not competitive, and recruitment and retention is a constant challenge.
- Low salaries for all employees along with the growing shortage of affordable housing in the mid-Willamette Valley only amplifies recruitment and retention issues.
- Data gathered from the 2016 OSULP climate survey indicated that communication and transparency in decision making were areas that OSULP might target to improve work culture/environment and job satisfaction. OSULP has acted upon concerns expressed via the climate survey to improve our work environment. We have broadened participation, enhanced communication across the organization, provided more professional development opportunities for classified staff and begun to analyze faculty salary issues, existing performance appraisal processes, and current faculty position descriptions. Ongoing work is necessary to create and maintain what the OSU Strategic Plan 4.0 describes as a "culture of belonging, collaboration and innovation." The climate survey did not explicitly focus on the recruitment and retention of a more diverse workplace, but OSULP must build on ongoing initiatives like the Diversity Scholars program to diversify the workforce.

Student Demographics. OSU's student body is increasingly more diverse and international, while faculty and staff demographics have not increased proportionately. In fall 2018, 25.4 percent of the students enrolled at Oregon State at Corvallis and Ecampus self-identified as students of color, compared to 15.8 percent a decade ago. Though the number of bachelor's degrees earned by underrepresented students had increased to 9.8 percent in 2017-18, OSU continues to be challenged by the lack of success in increasing the six-year (time to) graduation rate, especially for underrepresented students compared to other students. International student enrollment in fall 2018 accounted for 11 percent of overall enrollment, compared to 4.9 percent of enrollment a decade ago. Enrollment of transfers and Ecampus students also continues to increase steadily. Nearly 2,000 new transfer students enter OSU each fall term, and transfer students comprise nearly a third of overall enrollment.

Funding and Budgeting Issues. Persistent serials inflation, renovation projects, salary issues, and changes in the publishing market are all challenges for OSULP along with ongoing disinvestment in higher education at the state level. As the university confronts funding challenges, it must seek new sources for revenue and explore alternative funding models.

- The renovation of the Valley Library in 1999 represents Oregon State's last significant investment in the physical spaces of OSU Libraries and Press. Budget allocations continue to follow a historical model that has not been able to keep up with regular inflation in the scholarly publishing market, nor has it kept pace with growth in student and faculty FTE. In recent years, monies have been allocated to address (but not fill) gaps in collections budgets; however, there have been no similar allocations to address increased staffing needs or reinvestments in library physical spaces. Updating library spaces for users and workers requires sustained investment in an equally strong information technology infrastructure and in staff with specialized skills.
- OSU has embarked upon a new shared responsibility budget process to ensure ongoing financial sustainability. OSULP should expect to participate actively in campus conversations to address questions about the appropriate budget metrics and current benchmarks for service, support and management units like the Libraries and Press.
- State support for higher education across the United States continues to dwindle. Additional reductions in federal funding for research and education also has impacts on library and press services. Campuses face making up the difference by increasing tuition or making reductions. Increases in tuition pass the burden along to students and exacerbate affordability issues for students. This ongoing disinvestment in higher education has negative impacts on academic libraries.
- In 2014-15, OSU Libraries and Press lost the remaining FTE from the OSU Foundation that had been dedicated to supporting our fundraising efforts. While we have maintained annual fundraising levels, we anticipate that recent changes in federal tax laws could discourage our typical OSULP donors from supporting Libraries or Press initiatives.

Data. Providing a secure environment to ensure data privacy for individual users will continue to test OSULP and the university. Personal privacy, confidentiality of records and academic freedom remain important values for OSULP, but there continue to be very real challenges to individual and network security as well as compliance. As we address these challenges and demonstrate our longstanding values, our efforts may compete with campus efforts to leverage data-gathering capability (such as learning analytics). Any potential conflicts will call for extended conversations about how to appropriately gather data to personalize learning and advising without comprising security, privacy or compliance.

Opportunities

Innovative Redesign of Library Space. Continued advancements in digitization of scholarly materials provide academic libraries with an opportunity to improve research support and to create new learning spaces at the same time. High-quality digital collections allow researchers to have anywhere, anytime access to information, and they also support emerging research based on data mining and large-scale textual analysis. Campus investment to help OSULP respond to the elimination of our offsite storage location and replace print collections with digital would allow us to create useful, dynamic, necessary learning spaces for students.

Continuing Advances in Digital Scholarship. The digital era continues to provide opportunities for the development of collections, services and platforms.
- Digitized collections support data mining and textual analysis. Changes in computing power enable research on large data sets, and this opens up new lines of inquiry across disciplines.
- Digital platforms allow scholars to explore new ways of communicating and sharing research and open up new metrics for measuring the impact of research.
- University presses are looking to digital technologies to reimagine the scholarly monograph.

Library as Place. The response to a recent reduction in the Valley Library's open hours shows that students want to study in the library even when other spaces are available. By investing in collaborative learning spaces and academic success services in the library, where students want to be, Oregon State will efficiently and effectively support student success and engagement.

Open Initiatives. OSULP is deeply committed to openness and sharing, and as such, we join with other academic libraries to embrace open access to scholarship and curricular materials. Open initiatives create a path for universities and researchers to retain control of their intellectual content in order to reduce costs for consumers and to expand the reach and impact of research. Open does not mean free, nor does it mean a rejection of rigor or review. Instead, open initiatives provide structures that researchers can use to make intentional choices about sharing the results of their work.

Interdisciplinary Approaches. There is increased emphasis — at OSU and across the academy — on the value and importance of interdisciplinary approaches to

teaching, learning and research. Libraries, as inherently interdisciplinary institutions, are uniquely positioned to bring together students, faculty and staff from all parts of the university to collaboratively examine problems and solutions and to achieve common goals.

Ecampus Growth. As enrollment increases for Ecampus distance learning programs, our partnership opportunities can extend to offering more digital learning objects, web conferencing, increased access to library faculty and staff via online chat, and addressing the development and adoption of open education resources, especially in the context of Canvass, the university's learning management system. We can also continue efforts to improve the discovery of resources from OSU Libraries and Press through usability studies and other assessment techniques. This kind of assessment to develop and refine website searching as well as discovery platforms and tools will improve the library experience for all users.

Changes in Leadership. Models of leadership are changing in higher education, requiring new and different skills for future senior administrators and relying on a non-traditional pathway to leadership positions. Trends suggest that more and more faculty will retire in the next five to 15 years, and this demographic will include senior administrators. With leadership turnover comes the potential for realignment of OSU's existing organizational structure that could benefit OSU Libraries and Press or diminish its current reporting status.

OSU's Next Capital Campaign. The OSU Foundation is finalizing its strategic plan and preparing for the launch of the university's second capital campaign. This multi-year effort will provide possibilities for the University Librarian and other OSULP leaders to work with Foundation personnel to identify and gain access to individuals with interest in supporting the fundraising priorities of the Libraries and Press.

Sustainability. OSU Libraries and Press has engaged in multiple efforts that demonstrate our commitment to creating a more sustainable world. We have achieved successes in reducing the generation of waste that ends up in landfills through multiple strategies involving reuse, recycling and composting. We have an opportunity to build on these efforts and partner with other units on campus to adopt and implement additional objectives that would reduce OSU's carbon footprint.

Appendix B — List of Members of the Strategic Planning Committee

- April Zeller — Library Experience and Access Department
- Kelly McElroy — Teaching and Engagement Department
- Chris Petersen — Special Collections and Archives Research Center
- Kerri Goergen-Doll — Resource Acquisition and Sharing Department
- Rima Reves — Library Experience and Access Department
- Steve Van Tuyl — Emerging Technologies and Services Department
- Ian Scofield — Resource Acquisition and Sharing Department
- Heather Bennett — OSU Press and Library Administration
- Mary Markland — Guin Library
- Anne-Marie Deitering — OSULP Administration
- Faye A. Chadwell — OSULP Administration

Appendix C — Strategic Plan Development and Engagement Process

The Goals and Structure of the Plan
What is being developed is a plan with a vision and high-level goals for the coming five years. It will also include some concrete, outcome-oriented goals and success measures for the first three years, also at a fairly high level. A process facilitated at the department level once the plan is finalized will produce work plans for each department that are guided by the Strategic Plan goals.

The Strategic Plan and its goals and success measures will be reviewed annually in a streamlined process designed to flag the need for any adjustments to the Strategic Plan based on changes in resources, opportunities or challenges. A more in-depth review is planned for year three, but this could be initiated sooner if necessary. The mechanisms for these reviews have not yet been designed, but they will dovetail with an annual department-level work plan review and revision process.

The Timeline and Process for Completing the Strategic Plan
This process started in summer 2017 with the hiring of a facilitator, Tasha Harmon, and the selection of the Strategic Planning Committee (Appendix B). That committee met bi-weekly from September 2017 to May 2018 and continued their engagement in less collective ways through the completion of the plan in September 2018.

Department-level work plans (Appendix E) for year one, with some notations about multi-year goals, were developed in the summer of 2018, and then these were integrated into the Strategic Plan in September of 2018.

Mechanisms for Input
The committee was designed to bring a wide variety of perspectives to the work of drafting the Strategic Plan. Input from other library stakeholders was also sought through three meetings to which all library faculty and classified employees were invited: a meeting in September to get initial input; a second meeting in February to respond to draft language; and a third meeting in May to review and respond to a more complete draft. Input was also captured through an anonymous form, which offered an asynchronous opportunity for input and a venue for input outside of the group meetings. Lastly, there were also several focused discussions about the process and the goals of the Strategic Plan at LAMP, the Library Administration, Management and Planning group that provides an important forum for discussing and addressing broad Libraries and Press initiatives such as strategic planning.

Decision Making
Final decisions about the Strategic Plan contents were made by the Strategic Planning Committee in consultation with LAMP.

Department work plans were developed inside departments and submitted to LAMP. Then LAMP made decisions related to budget and other OSULP-wide issues that impacted those work plans, and other decisions were made by the departments.

Appendix D — Bridge to Implementation

Implementation

Over the course of summer 2018, each department created a work plan to guide their work for the coming year and identify cross-department dependencies and goals with multi-year arcs. Departmental goals and strategies were incorporated into the plan and will be continually incorporated into future revisions.

In 2019 and 2020, each department will engage in a process of reflection and revision for their department's work plan. LAMP and the Strategic Planning Committee will also engage in a similar process.

In 2021, the third year of the plan, we will engage in a deeper reflection and revision process OSULP-wide and address core questions such as the following:

- What have we accomplished?
- What have we added/taken on that is not reflected in the plan?
- Where are we not meeting our goals? What is causing us to miss?
- Where do we need to revise the plan language (vs. change what we're doing to conform better to the plan)?
- How is the overall process working, and what needs to change?

Based on this process, the Strategic Planning Committee will work with classified staff and faculty members throughout the Libraries and Press to make revisions to the Strategic Plan. The revised Strategic Plan will then be used by departments as they develop their work plans for 2021 and 2022.

In 2023, the fifth year of the plan, the Strategic Plan and its implementation will be evaluated, which will result in construction of a new Strategic Plan.

Appendix E — Snapshots of Unit Work Plans

Excel Spreadsheets with Goals and Tasks
The spreadsheets on the following pages outline goals and tasks for the units within OSU Libraries and Press. These spreadsheets offer more detail than the unit highlights in Part VI. For the current and complete versions of unit work plans, contact Don Frier at don.frier@oregonstate.edu or 541-737-4633.

TEACHING AND ENGAGEMENT	Outcome Goals and Tasks
Paragraph	**Outcome Goals and Tasks**
1	**Build the 2nd floor classroom**
a	Determine funding for furniture, select, order, purchase, install, and test furniture (student desks and chairs, instructor station, picture rails, white boards, storage cabinet (if we get one), etc.)
b	Work with Rachel Z, Dave M, Academic Technologies, and others on ordering, installing, testing, and preparing for use the mobile displays, the instructor station, and the instructor computer
c	Set up any processes needed to make these decisions, for ex. regular meetings with Rachel, etc.; input from instruction librarians on furniture and other decisions; track that funds are expended and items are ordered; ensure regular communication about progress
2	**Create learning goals for data literacy**
a	Inventory of opportunities and resources on campus. What are the learning goals they fulfill?
b	Needs assessment: understand needs or gaps for data literacy on campus
c	Problem solving: ways to fill the gaps on a sustainable way, including developing partnerships with other entities on campus who have similar goals.
d	Instruction for research services (workshops)
3	**Big Unanticipated Thing(s)**
4	**State TED priorities for outreach (including specific events, content areas, and functions)**
a	Create a flexible and inclusive philosophy or list of what outreach means to TED
b	Outreach Committee-TED faculty support creation and implementation of assessment of library outreach activities through participation on the Outreach Committee
c	A collection of assessment methods for TED departmental outreach are identified, used, and revised as needed.
d	Based on tasks a-c, audit existing TED outreach work in order to identify gaps that should be filled or let go for the short term.
5	**Recreate "How To"**
a	Decide what is created, prioritize and delegate work as needed
b	Develop Canvas compatible modules
c	Develop assessment tools (also Canvas compatible)
d	Regularly assess use of Canvas modules/Maintenance
6	**TED leads adoption of creative commons licensing for instructional materials**
a	Discuss and decide which license to adopt for LibGuides created by TED librarians
b	Identify a place for TED to store OERs (e.g., Institutional Repository)
c	Identify what other OERs are produced in TED that we may want to license
d	Develop guidelines for licensing, storing, and distributing TED created OERs
7	**Review, choose, and adopt a tool to track various metrics of our work to inform the development, staffing, funding, planning, and assessment of our work**
a	Create a list of requirements
b	Identify barriers to existing tools
c	Lead training as necessary on using tools
d	Regularly report on metrics and use to make departmental decisions
8	**Hiring and Onboarding**

a	Finish onboarding document
b	Share onboarding document with TED folks & revise as needed
c	Create guide describing typical types of teaching that librarians offer; ways to learn about OSU's curriculum; and hold regular discussions in TED about questions such as where do we find the most value in our classes/teaching? Analyze curriculum, discuss bounds of where we'd intersect and what we'd offer (Framework-Guide) Start in Spring Term 2019
9	**Develop and apply a critical pedagogy approach to our outreach and teaching activities**
a	Learn techniques to evaluate our activities from an anti-racist, anti-oppressive standpoint.
10	**Develop, test, and adopt decision-making roles and processes for questions that arise within TED (process goal) to ease our work, to make explicit our tacit decision-making, to strengthen trust & buy-in for our decisions, and to live our value of being collaboratively led.**
a	Conduct a needs assessment for meetings and decision-making
b	Develop a list of options to meet needs (from assessment)
c	What are some TED decisions? Outline what this covers (define)
d	TED Head blocks out more time to develop agenda and facilitate
e	When agenda items are proposed, proposer recommends a specific decision method
f	April 2019 Check-in to learn how new process is going and learn what additional changes are wanted/needed
g	At annual TED retreat check in on this process and refresh or change as needed/inspired
11	**Core Work as a member of TED and as a tenure track faculty member *assessment and communication apply to each category of activity**
a	Instruction examples include credit courses, single sessions, workshops, professional consultations
b	Outreach examples include START, Bridge, liaison work
c	Professional Development (such as reading together, instruction get together, reviewing libanalytics reports)
d	Collaboration/Cross-departmental work such as collection development and chat/studio
e	Administrative: examples include supervision, reporting
f	Service to TED (such as: care for TED's wiki, web, google, and libguide pages and forms; represent TED on library staff association and the library ILS (integrated library system); care for the library classrooms; care for our selves by having regular times to chill out
g	Scholarship and Creative Activity
h	Service to local/regional and national/international professional community
i	Participate in Library Faculty Association and Promotion and Tenure includes regular meetings plus any roles or groups that grow out of this
j	Dossier creation and regular attention
k	Administrative: examples include attending and participating in admin briefing, in-service, other activities

ADMINISTRATION	Outcome Goals and Tasks
Paragraph	**Outcome Goals and Tasks**
1	**Increase capacity of OSULP to do marketing and promotion.**
a	Support RAS as they establish a policy and procedure support platform branding on e-resources
b	Establish a social media strategy and workflows for OSULP
2	**Increase capacity for OSULP to create meaningful experiential learning opportunities with library jobs.**
a	Implement departmental internship pilot
b	Create a workflow for determining priorities for Admin departmental intern and establish workflow for hiring
3	**Identify strategies and actions for advancing university Equity, Diversity, and Inclusion (EDI) related strategic goals**
a	Support training and developmental opportunities across the library to help individuals identify and address biases, microaggressions, etc
b	Increase capacity of OSULP to enact inclusive hiring practices with student jobs
c	Ensure addition of EDI goals or tasks in employee PDs
d	Lead the effort on mapping OSULP EDI goals to the university's goals
4	**Ensure effective financial management and stewardship.**
a	Continue documenting and communicating how funding works at OSULP
b	Finalize a strategic budget and financial planning calendar that integrates OSULP and university-level strategic planning activities
c	Develop training or workshops that build budget management skills and utilization of new fiscal management systems and databases
5	**Increase the efficiency of gathering quantitative assessment data.**
a	Streamline ACRL/IPEDS data collection workflows
b	Successfully implement Triennial Survey
6	**Do stuff that involves multiple departments. MAYBE: Lead organizational planning, development, & implementation of cross-departmental initiatives**
a	Develop a shared set of professional development activities and expectations around teaching/learning that would become a part of the onboarding process
b	Develop an infrastructure, web presence, and initial work plan for research services
c	Establish and get buy-in for a shared learning services framework
d	Articulate and document OSULP's commitment to Open
7	**Reimagine reporting expectations (around quarterly, annual, departmental, impact, etc. reports) to eliminate duplication of effort, and to ensure that data reported is shared and used appropriately**
a	Reassess impact report based on audiences and OSULP and the university's goals
8	**Coordinate efforts across OSULP to support the university accreditation process**
a	Complete website cleanup as necessary to supprt university accreditation porcesses. Ensure that policies are easy to find, and that documents used as evidence in the self study are easy to find

9	**There are a number of key administrative positions at Oregon State that are currently filled with people in interim roles. All departments should be ready to take actions (participate in campus conversations, serve on search committees, etc.) to ensure that our goals and priorities are communicated to interim heads and to new administrators as positions are filled.**
a	Support particiapation by library faculty and staff in searches and search-related events
b	Advocate to campus administration for library participation in key searches and campus conversations
10	**Improve communication infrastructure**
a	Support centralized scheduling for library-wide meetings, to include setting up the necessary technology to support those meetings; ensure that meetings are scheduled in rooms that allow remote participation where needed
b	Provide multiple opportunities and channels for communicating information about the 3/4 floor move to relevant audiences
c	Create opportunities to communicate cross-departmental and campus-wide issues through communication, organization, and logistical support
11	**Increasing consistency and clarity in communicating job expectations and rewards for individual faculty positions.**
a	Streamline faculty PDs
b	Evaluate compensation process
c	Revise faculty evaluation process
d	Promotion and Tenure Committee actions
12	**Ratchet up fundraising capacity**
a	Articulate fundraising goals that align with campus and foundation priorities that are specific to OSULP
b	Build new donor relationships and revitalize existing connections
c	Implement more marketing strategy and behavioral research inot communication efforts to donors
d	Publish more articles about major donors--tell their human stories and why they support OSULP
e	Increase funding for Messenger magazine to add four additional pages
13	**Support the updating and editing of web content**
14	Support planning and implementation of space initiatives
a	Work towards the development of a new off-site storage location
b	Reassignment of 3rd/4th floor work spaces
c	Identify fundraising strateiges for remodeling of existing spaces

EMERGING TECHNOLOGIES AND SERVICES	Outcome Goals and Tasks
Paragraph	**Outcome Goals and Tasks**
1	**Broaden the impact, heighten the user experience, and improve the performance of Oregon Digital**
a	Oregon Digital 2 planning & reporting
b	Oregon Digital 2 development
c	Building Oregon App
2	**Continue to improve the security, privacy, accessibility, and usability of OSULP's websites and related applications, through new development and appropriate maintenance schedules**
a	Website maintenance
b	OSU Press site update
c	Ellie's Log site update
d	ILLiad/Summit info pages update
e	Policies page
f	Admin page reorg
g	Website cleanup
h	LibGuides maintenance and improvements and help with How-to Guide if needed
i	Primo maintenance and improvements
3	**Extend the use of kiosks in the library to give users information at the point of need and to promote exhibits and events**
a	Donor Kiosk purchase hardware, update webpage look
b	SCARC view kiosk - roll out and train SCARC staff
c	SCARC exhibit kiosks Purchase hardware and do some software design
d	Define success measures for kiosks as a whole
e	Conversation with LEAD re: kiosk enhancements
4	**Implement OSULP's digital preservation plan to ensure the continuity of our unique online content**
a	Digital Preservation Roles defined
b	Digital Preservation group organized
c	MetaArchive Pilot
d	MetaArchive Discussion and decision
e	Archivematica decision and set up
5	**Develop new applications that help students, library users, and staff in meaningful ways**
a	Data Dashboard
b	EZ Deposit 2
c	LibNav
d	TRESbien
6	**Maintain and improve applications that support core services**
a	Oregon Explorer support and maintenance
b	ILLiad support
c	ScholarsArchive @OSU
d	Conversation about OE servers

e	Library Find Bliacklight moved to new approach (OE)
f	Archon-accession module
g	CVM
h	Update Wiki to latest version
7	**Maintain and improve the systems infrastructure that underlies all of our services. Continue our strong support of hardware and software in the Learning Commons and classrooms.**
a	Maintenance/replacement cycles for BScan machines
b	Keeping the LC and classroom technology going
c	SRE approach to systems
8	**Strengthen the ETS team by hiring and effectively onboarding new staff**
a	New Metadata Librarian
b	Searching for and onboarding new Systems Librarian
c	Searching for and onboarding new Sys Admin
9	**Address the broader needs of OSULP through project planning and working cross-departmentally**
a	Regional project exploring HMSC student research papers and preservation in SA@OSU
b	OERs in SA@OSU
c	Accessibility for E-Resources
d	Archon - succession planning
e	Banner/Alma remote faculty patron uploads
f	Plan for and complete mass update of ILLiad email addresses
g	Cataloging run the scripts for WEST project
h	Set up Grouper for user permissions
i	Begin discussion about EZ Proxy configurations and security improvements
j	Student tech help for classrooms each term
k	ILLiad migration to Tipasa
l	Potential SCARC move to Drupal
m	Potential MakerSpace
n	Potential Vis Lab
10	**Training and Communication**
a	Training in use of SA@OSU - uploading docs and assigning metadata
b	Consulting with 2nd floor classroom (David)
c	Continue to refine ticketing/ problem reporting and tracking
11	**Respond to the strategic needs of Library Administration**
a	Triennial Survey
b	OSU Diversity Strategic Plan

GUIN LIBRARY	Outcome Goals and Tasks
Paragraph	**Outcome Goals and Tasks**
1	**Create new user space that facilitates both collaborative and individual work in preparation for MSI program expansion**
a	Perform inventory of current collection to identify missing items and clean-up holdings records
b	Work with RAS to de-duplicate the serial holdings that are owned by both Guin and Valley in order to create more space
c	Weed Guin monograph collection based on GreenGlass reports and ALMA data to reduce shelf space
d	Set up procedures needed to make these collection decisions in conjunction with RAS
e	Unanticipated stuff
2	**Planning for Marine Studies Initiative impacts in order to prioritize work**
a	Stay aware of MSI decisions and remain engaged in MSI discussions in service to Guin Library's goal, procedures, policies and services.
b	Evaluate after-hours usage looking at student access and security issues in order to inform any policy changes needed as MSI progresses
c	Create process with HMSC IT to routinely receive after-hours access data in order to do on-going analysis
d	Prepare a report and present to HMSC Executive Committee and Library Administration regarding current after-hours access policies and use to gain support for potential policy changes.
e	Create flow chart to facilitate after-hours access decision-making
f	Determine if we need to make staffing asks in order to improve access and security
g	Broaden scope of collection development activities to include more liberal arts and social science materials for use in the proposed MSI degree program.
h	Unanticipated stuff
3	**Create a more usable collection**
a	Re-link Guin "host-bib" records in order to more clearly reflect the titles we own
b	Update IAMSLIC Union List of Serials in order to accurately reflect the titles we own that can be borrowed by IAMSLIC members
c	Continue digitization of unique holdings for repository deposit in either ScholarsArchive or Aquatic Commons (IAMSLIC) in order to make them more widely accessible
d	Explore participation in the Cyamus (IAMSLIC) student paper digitization project in order to make the papers and their data more widely accessible
e	Determine local interest and feasability in participating in the project
f	Work with ETS to resolve copyright issues and digitization procedures.
g	Maintain and update unique bibliographies on local estuaries, HMSC publications, Snavely reprint collection and salmon documents
h	Unanticipated stuff
4	**Admin Asks**
a	Help identify essential content and refine wording on questions to be included in the Triennial Survey

b	Identify teaching faculty representatives to meet with Anne-Marie to work on required professional development for new library teachers
c	Work with Anne-Marie (once in a big meeting and twice in departments) to create a shared vocabulary and framework for library learning services.
d	Unanticipated stuff
5	**Resource Sharing**
a	Interlibrary Loan and Summit
b	Update procedures manuals in print and on the wiki
c	Hire and train new LT2 staff member
d	Update on-boarding process to create a smooth transition for new hires
e	Udpate LT2 procedure to facilitate training and create a smooth on-boarding process
f	IAMSLIC Document Delivery and Interlibrary Loan
g	Update IAMSLIC Union List of Serials in order to accurately reflect the titles we own that can be borrowed by IAMSLIC members
h	Perform the daily, monthly and quarterly ILL functions
6	**User Services**
a	Circulation
b	Hire and train new LT2 staff member
c	Do the daily, monthly and quarterly circulation functions
d	Reference
e	Explore options for capturing significant reference transactions for measuring success
f	Reserves
g	Keep possible increased MSIL demands in mind when service and space planning
h	Explore options for measureing success of reserves service
i	Perform the quarterly reserves functions
j	Provide personal, individual support for patrons in order to understand patron needs that will inform our work and priorities
k	Develop system(s) for capturing needs for future use and reporting
7	**Collection Maintenance**
a	Shift collection after weeding and serial de-duplication projects in order to create more user space
8	Collection Development
a	Continue to update collection focusing on current research needs for our faculty and students. Continue adding materials to serve future MSI needs.
b	Work with RAS Acquisitions staff to develop procedures for ordering new materials to improve efficiency and keep track of titles ordered and received.
9	Space Management and Development
a	Meeting rooms
b	Work with new HSMC Operations Manager and Logistics Coordinator to review meeting room policies and usage
c	Begin conversation about replacing library seminar room for something more flexible
d	Continue to track meetin room usage to infomr future space decisions
e	Carrels
f	Review and update policy based on new HMSC space needs

g	Investigate new furniture and shelving configurations in order to increase user space for collaborative and individual work
10	**Administration/Guin**
a	Hire a new LT2
b	Building maintenance
c	Continue to pursue door lock maintenance inclunding fixing current locks and possible adding new door locks for improved security
d	Develop a schedule for carpet cleaning in order to maintain health and esthetic standards
e	Plants
f	Determine funding source for required items for plant maintenance and growth.
g	Supplies
h	Train LT2 and LT3 in use of BennyBuy so supplies can be ordered in a timely manner
i	Statistics
j	Continue to review the need for certain statistics to inform our work and decision making
k	Create new ways of tracking data needed for strategic plan success measures
l	Web Page
m	Review and update Guin-specific content on the Guin web page
n	Saftey Procedures
o	Update safety manual and wiki site
p	Initiate conversations with HSMC Operations Manager to discuss security concerns for staff and patrons within Guin Library

OSU PRESS	Outcome Goals and Tasks
Paragraph	**Outcome Goals and Tasks**
1	**Publish 18 to 22 high-quality books each year that reflect outstanding scholarship and creative work**
2	**Continue publishing books by underrepresented, diverse authors to promote equity and inclusion**
a	Educate authors and editorial boards members as advocates
b	Outreach to current and former recipients of Literary Arts fellowships
3	**Make and keep books available**
a	Digitizing backlist
b	Systemizing reprints process
c	Archiving production files
4	**Implement presswide database**
a	Migrate bibliographic data, contacts, etc.
b	Training
c	Establish procedures/protocols
5	Develop processes, procedures, and tools for managing Press assets
a	Develp internal standard financial reports using industry benchmarks
6	**Increase revenue**
a	Explore creative use of backlist content
b	Explore audio books and other subrights opportunites
c	Explore new fundraising possibilities
7	**Develop press website**
a	Ricky and Ellie website update
b	Press website relaunch
8	**Contain costs**
a	Inventory management
b	Conversations with printers on ways to offset increases in paper costs
c	Broaden freelance pool; strategize in-house vs. freelance per project
9	**Develop/publish works that reflect OSU's core strengths**
a	Develop/publish OSU-related publications
b	Develop/publish works by OSU faculty
c	Develop/pubish works that reflect OSU's three strategic initiatives
d	GOAL connected to OSU's expansion in area of liberal arts
e	OSU year of water connected goal
10	**Provide educational opportunites in university press publishing through student intersnship**
a	Update Griffis intern website periodically
b	Explore ways to maintain contact with interns
11	**Establish and maintain an advisory role in library publishing activities**
a	Press role/work on Open Textbook Initiative volumes
12	**Work with Library Digital Production unit for scanning/production needs on relevant projects**
14	**Reflect more systematically about aspects of our work, success measures, and their relationship to the SP**

15	**Increase visibility on and beyond campus**
a	Presence/visibility at Beaver Store
b	Presence/visibility at Hatfield Center store
c	Presence/visibility at Portland OSU Center
d	Admin-collaboration with and support from Dan Moret for publicity and visibility

RESOURCE ACQUISITIONS AND SHARING	Outcome Goals and Tasks
Paragraph	**Outcome Goals and Tasks**
1	**Core Services**
a	ALMA migration "Missing" status cleanup
b	Maps Cataloging
c	Atomic Energy Collection Cataloging (new - copy-cataloged)
d	Atomic Energy Collection Cataloging (old - original cataloging)
e	The Unanticipated
f	Eresource Access Checking and Coverage Verification
g	Process print and electronic services and materials (i.e., journals, standing orders, ebook/ejournal and streaming video packages) that total close to $5 million worth of resources
h	Create documentation and provide training for Guin staff to be able to delete OCLC holdings for last OSU copy of a tile for both monographs and serials.
i	Create documentation and provide training for Guin staff to be able to download OCLC records as part of being able to do copy-cataloging independent of cataloging unit.
j	Teambuilding
k	Subscription life cycle: starting new subscriptions, contributing to collection development decisions, processing of invoices and credits. Reviews and monitors publisher and vendor announcements for changes in purchased or gifted resources.
l	LICENSING: Document standard sections and clauses commonly used by Acquisitions manager (Sections commonly negotiated into licenses) and sections in Alma/Primo License Terms Display
m	RAS wiki workflow: Communication and documentation (work that intersects between all RAS units)
n	Monthly RS statistics
o	MatPrep monthly report
p	MatPrep de-dup multiple copies
q	Hiring and onboarding
r	Assist Guin in training new staff (LT2 this year, and possibly LT3 next year) for resource sharing, cataloging and acquisitions. Requires travel, staff availability, and scheduling.
s	Continue cataloging Open Textbook collection as new material is added. This project is already underway and approved by LAMP.
t	Print Serials Deselection
u	Original cataloging for SCARC
v	Deselection projects
w	Catalog Oregon state documents (OrDocs) – print books and serials
x	Catalog new print serial titles
y	Catalog Special Collections serials and monographs
z	Catalog purchased PDFs
aa	Catalog DVDs
ab	Catalog shipments of physical government documents received from the Federal Depository Library Program (FDLP)

ac	Catalog OSU Cascades gift monographs
ad	Catalog Kindle ebooks
ae	Catalog "Cated as Seps" print books
af	Catalog Analyzed series
ag	Catalog Proquest Ebook Central autopurchase ebooks for OSU
ah	Acquiring and cataloging FDLP materials within our area of responsibility for the shared depository for Oregon
ai	Review author/subject headings on finding aid bibliographic records to ensure they match authority records
aj	Convert EAD records for finding aids from XML to MARC and load into OCLC and Alma
ak	Deselecting superseded and unwanted materials in our depository and maps collections
al	Withdraw monographs
am	Process adds, replacements, and transfers
an	Rush cataloging of print books, videorecordings, ebooks, etc.
ao	Provide problem resolution for items identified by Collection Maintenance, Circulation, Acquisitions, and Guin Library
ap	Recon of federal and state documents
aq	Recon of serials and monographs
ar	Create authority records for OSU, Oregon, and other authors
as	Load records for new and deleted titles for Proquest Ebook Central OSU DDA records
at	Load records for electronic OrDoc resources
au	Load records for Marcive files for new electronic records
av	Shifting Projects
aw	Coordinate, train and manage student staff.
ax	Verify access (primo, ezproxy, PCI) to e-resources. Year round task.
ay	Receive and process physical resources, create and maintain physical and electronic resources in the Library's ILS records for print and electronic serials, standing orders, federal documents, newspapers, and physical media.
az	FIrm ordered material - Receive and process physical resources, create and maintain firm ordered physical and electronic resources in the Library's ILS records for ebooks, books, streaming videos.
ba	Licensing life cycle: Manage e-resources' licenses and terms and conditions for electronic services. Liaise with OSU's procurement and contracts team to request their review and signature on agreements and orders forms.
bb	Support the management of electronic resources' life cycle: research new vendors, set up and monitor trials, upload licenses into ERM. Communicate new e-resources, trials, and e-resource outages to OSU Libraries faculty and staff.
bc	Coordinate and communicate access concerns to Collection Development librarians.
bd	Collect data, evaluate, and provide reports to help the Collection Development Council and/or department head make renewal or cancellation decisions.
be	Budget related: On a weekly or monthly basis reconcile Acquisitions' Gift funds in the foundation system and ILS. Reconcile expenditures and credits for unit using ILS and Banner or BennyBuy.

bf	Research and resolve billing or access problems and internal errors by communicating with business center and/or vendors
bg	Deselection of standing orders as they come up (These do not come up as renewals.)
bh	Incorporating GovDocs collection decisions into RAS
bi	Active Work Orders cleanup project
bj	GovDocs Cataloging
2	**Improve the discovery of collections at OSULP**
a	Discuss with LEAD the scope and services needed to incorporate cultural center material into ALMA/Primo and the possibility of a pilot with the Pride Centers. Stakeholders would be Lori Hilterbrand and Natalia Fernandez
b	Serials Backlog Projects pt. 2 Finish cleanup of journal records that did not migrate correctly and update holdings/order records as needed
c	Newspaper clean-up project: Add records in Alma for 27 newspapers we are currently receiving for discoverability in the catalog. Clean-up a handful of newspaper records that need to be closed/updated
d	Music Score Cataloging
e	Microform(s) cataloging backlog
f	Persian Collection Re-cataloging
g	Maps recon
h	Fixing migrated records that were "Technical migration" but now "Missing"
i	Deleting Host Bib Records
j	"Problem" instead of call number in serial holdings record (ALMA migration cleanup)
k	Analytics Recon
l	OrDocs maintenance/deselection
m	Fixing "null" in URL
n	ALMA migration "Missing" status cleanup
3	**Maintain the OSULP physical collection for ease of browsing and access**
a	Serials Backlog Projects - Review serials material currently rec'd as gifts; evaluate/update retention periods as appropriate
b	Maps Deselection
c	GovDocs Deselection
4	**Improve online/remote access to OSULP electronic collections and services**
a	Review Banner/Alma remote faculty patron uploads and improve workflows by end of year 1.
b	Working with Admin, set up a process to support platform branding on E-resources (OSU Logo modifications and uploads).
c	Begin discussion on EZProxy configuration and security improvements.
d	Platform Link Resolver (Base-URL Activation).
e	Working with ETS, set up user permission management (Grouper) with support from IAM campus department.
f	Working with TED, LEAD, and ETS, set up a process for testing accessibility of E-Resources.
5	**Improve RAS internal work processes**
a	Working with ETS, develop a process for cataloging to independently run scripts for WEST holdings project.

b	Analytics training. Obtain training from Laurel Kristick (and Orbis Cascade) to learn how to run reports for circulation statistics on print journals. This will help provide Kerri/and or Collection Council with useful information when proposing retention or format changes. Acquisitions needs help from Laurel Kristick. RS (Laura Ramos and Kathy V.) may be
c	Create maintenance/replacement cycle for ILL scanning machines by end of year 1.
d	WorldCat Knowledg Base (or similar) implementation
e	Approval Plan - update purchase criteria to incorporate more diverse authors and content
f	Discuss with LEAD the types of resource sharing questions they receive from patrons to find ways to improve services so number of questions is minimized (possiblities include updated webpages, updated language on ILLiad request forms, having RS staff available on
g	Have a process conversation with Guin to discuss how they can work more autonomously in service to their space planning goals (items 10 and 11 assist in this action).
h	Service Design work for 3rd floor space
i	Workplan process for Collection Council
j	Updating Resource Sharing Documentation in Wiki
k	Investigate ticketing system for Valley.Collections purchase requests.
6	**Improve user experience with OSULP services**
a	Discuss with LEAD the possible issues related to not sanctioning overdue material with monetary fines (budget and contract issues). This may lead to a proposal that goes to LAMP for approval.
b	Working with ETS, complete ILLiad Webpage updates by end of year 1. This also ties to the conversation with LEAD about resource sharing questions from patrons.
c	Working with ETS, complete ILL/Summit webpage updates by end of year 1.

SPECIAL COLLECTIONS AND ARCHIVES	Outcome Goals and Tasks
Paragraph	**Outcome Goals and Tasks**
1	**Seek and acquire archival collections that further learning and research, and enable discovery of those materials**
a	Identify, research and purchase collections per SCARC's collection development policies
b	Work with donor on gifting collections per SCARC's collection development policies
c	Work with campus units on identifying and transfering university records with historical and research value
d	Create and update finding aids
2	**Offer opportunities for students to engage with primary sources materials through experiential learning and instruction**
a	Establish experiential learning outcomes for student workers and interns
b	Establish and strengthen relationships within SCARC, as well as improve intra-library communication about SCARC activities and services, to better reflect our work
3	**Organize, host and participate in events that inspire and engage our communities through showcasing SCARC collections**
a	Participate in Oregon Archives Month
b	Plan and host two Collections at the Center events per academic year
c	Host at least one open house each academic year, as a part of Family Weekend, Homecoming or another appropriate university event
d	Host and give tours as appropriate and as staff time permits
e	Host at least one exhibit-related public event per academic year
f	Participate in relevant external evens as appropriate (OSULP, OSU community, outside orgs/groups)
g	Plan and host the Pauling Legacy Award event spring 2019 and 2021
4	**Work with other OSU units on displays and exhibits**
a	Building and Place Name project--interpretive materials for five buildings
b	Campus historic signage intiatives (CLA, Gateway Walk)
5	**Create new oral history collections and continue adding to existing oral history collections**
a	Oregon Tith, Oregon Century Fam and Ranch Program
b	Create new OHMS sites for legacy oral histories
6	**Explore and develop tools for describing and providing access to SCARC collections**
a	Determine long-term viability of Archon
b	Implement accessions module of Archon
c	Develop annual a/d prioritization criteria and goals
7	**Identify new potential digital collections utilizing SCARC cotent, and explore collaborative digital collections projects and options for grant funded digitization projects**
a	Explore the creation of an OSU maps digital collection
b	Explore the potential of a digital collection collaboration with OSA focusing on our respective Gifford photograph collections

c	Develop a grant proposal for digital conversion of the KOAC "In Our Care" motion picture films
d	Digitize new photograph collections and series of OSU publications
8	**Ensure the long-term preservation and accessibility of archival materials through secure, efficient, and appropriate facilities and infrastructure that meet professional best practices**
a	Maximize the efficiency of the 5th floor compact shelving through modifications, moving and shifting of collections
b	Create additional access to the SC by modifying the avenue door
c	Consolidate and condense new accessions and large, unprocessed accessions
d	Maximize the use of the 5th floor stacks work area for preservation and conservation-related work
e	Develop SCARC specifications for offsite storage and participate in planning
f	Investigate replacing/upgrading SCARC's security alarm system
g	Invest in collextions care and presevation training and disaster planning and recovery training for SCARC faculty and staff
9	**Establish and strengthen relationships within SCARC, as well as improve intra-library communication about SCARC activities and services, to better reflect our work**
a	Strengthen dialog/links between functional activities, especially instruction and collection development, DPU/digital collections, and public services
b	Strengthen teaching relationships between SCARC staffers
c	Implement SCARC views for library kiosks
d	Develop process for informing other public service desks of SCARC events (public and non-pu
10	**Research and develop assessment and success measures for SCARC outreach activities, including social media, in line with library assessment and reporting needs, and develop best practices to optimize SCARC's social media platforms**
a	Work with the assessment librarian to develop specific assessment and success measures
b	Improve collaboration with OSULP staff on events/outreach/social media
c	Work with Library Admin to determine the best stratiegies for marketing SCARC and library-wide activities, resources and achievements through reaching a wider audience, particularly through social media
d	Solicit outside guidance on developing a social media plan--possible a student intern from Marketing/College of Business or New Media Communications
11	**Determine best means to provide effective and high quality records management services to the university community**
a	Initiate conversations with central administration (OCG, Compliance, Faculty Affairs) about best placement of RM within the university
b	Revise and expand the general schedule
c	Prepare unit-specific schedules
d	Provide records center services as needed
12	**Create a structure to regularly share SCARC instruction activities and identify opportunities for micro instruction and e-campus instruction**
a	Create a model for instruction-related information
b	Create mini lessons, tools for on-desk microinstruction

13	Facilitate participation (including presentations) by classified staff in professional conferences and workshops
a	Work with Library Admin to develop process and finding for SCARC classified staff to attend conferences and/or professional development workshops annually
14	**Enhance users' virtual experience by optimizing SCARC social media platforms and creating a redesigned website**
15	**Enhance users' physical experience by expanding SCARC exhibit space, as well as improving tools and services available to onsite researchers**
a	Use a phased approach to convert the 5th floor copier alcove to accommodate a wide range of exhibits, including digital exhibit kiosks, traveling exhibits, and freestanding exhibits
b	Develop an annual exhibits budget
c	Develop exhibits for alternate spaces on the 5th floor, such as pop-up exhibits and periodic displays for the small case
16	**Cultivate new communities of donors to create a more inclusive and representative historical record**
a	Design and produce materials that show evidence of the impact that a collection donation can make to SCARC operations/researchers
b	Train and enable SCARC staff to contribute to this cultivation effort
c	Investigate means for tracking link between events and collections
17	**Engage in periodic reappraisal of SCARC collections, as well as review of the OSULP's general collection holdings (Valley Library and Storage), to assess their ongoing historical, research and administrative value.**

LIBRARY EXPERIENCE AND ACCESS DEPARTMENT	Outcome Goals and Tasks
1	Refill open positions & train new personnel.
2	Continue Concierge project.
3	Discussion and decision on single point of service/combined desks.
4	User feedback plan, and initiate methods: systematic, ethnographic user focused ways; SUMA counts, Stories, Surveys , Diaries, etc. Lending Sketch book Idea.
5	Student and staff cross training.
6	An activity or presentation on working professionally with people who have disabilities or health issues.
7	Some kind of facilitated group activity on interpersonal communication in support of staff retention.
8	Set up a process for testing accessibility of E-resources.
9	Determine the most efficient process for keeping the other public service desks informed of SCARC special events.
10	Identify teaching faculty representatives to meet with AMD to identify key content/support all new library teachers should get before representing OSULP in the classroom.
11	Work with Library Administration to create a shared vocabulary and framework for library learning services.
12	LibNav - wrap up, test and go live.
13	Student tech help for classrooms each term/help to orient users teaching in the classrooms
14	Roll out temporary signage graphic design standards, templates, and best practices.
15	Discussion about updating and expanding kiosks: both more graphics and issues with kiosks in the library.
16	Assistance in training new LT3 in Summer/Fall 2019 from Guin Library.
17	Replacing security guards with trained student workers or interns.
18	Replace circulating Windows PC collection.
19	Discussion with key stakeholders about eliminating fines and offer alternatives (such as Food for Fines).
20	Working with cultural centers' to incorporate collections into ALMA.
21	Discussion on idea of a proposal for systemactic ongoing tech lending funding.
22	Conduct peer tech training workshops in the learning commons to address common problems (such as making graphs and charts) that students encounter using Microsoft Office application products.
23	Discussion of Virtual Reference - train ILL/Summitt staff.
24	Continue asking for funding for additional positions; Discussion on stabalizing student budget; extra support for cross training; support for studnets in URWS.
25	REFILL the open LT3/whatever it may be under Info Desk - discussion with key folks.