Strategic planning

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Strategic Planning at
The Ohio State University Libraries

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Associate Director for Information Technology
Alison Armstrong
Associate Director, Research and Education
About Ohio State

- Top-20 public university
- Land grant, urban, research
  - 63,000 students
  - 15 + Colleges
- 13 OSUL locations
  - 53 faculty librarians
  - 182 staff
  - 382 student workers
The Ohio State University is the model 21st-century public, land grant, research, urban, community engaged institution.
The University is dedicated to:
• Creating and discovering knowledge to improve the well-being of our state, regional, national and global communities;
• Educating students through a comprehensive array of distinguished academic programs;
• Preparing a diverse student body to be leaders and engaged citizens;
• Fostering a culture of engagement and service.
• We understand that diversity and inclusion are essential components of our excellence.
Current Strategic Plan (draft)

Equip Students for Lifelong Success
Promote equitable learning through transformative teaching, services, and employment

FOCUS AREAS:
- Teaching and learning effectiveness
- Affordability and open educational resources
- 21st century literacies
- Educationally purposeful student employment

Empower Knowledge Creators
Advance innovative research and creative expression by fostering, preserving, and sharing knowledge and scholarship

FOCUS AREAS:
- Interdisciplinary scholarship and emerging research methods
- New models for scholarly communication
- Collaborative collection building and access
- Leveraging distinctive collections for use

Engage for Broader Impact
Pursue initiatives aligned with university priorities to promote a more engaged and better informed society

FOCUS AREAS:
- Underserved and at-risk communities
- Campus and external partnerships
- Cultural programming and outreach
- Open content for expanded access

Enrich the User Experience
Center the user experience in services, planning, and decision making

FOCUS AREAS:
- Seamless discovery, access, and delivery
- Exceptional service
- Inspiring learning and work spaces
- Iterative assessment and development

Invest in People
Develop the full potential of faculty, staff, and student employees

FOCUS AREAS:
- Recruitment, retention, and rewards
- Equity, diversity, and inclusion
- Workforce development and organizational learning
- Organization-wide culture of leadership, risk-taking, and accountability

Model Excellence
Increase effectiveness to achieve strategic and operational objectives

FOCUS AREAS:
- Agile planning and operations
- Communicating value to stakeholders
- Organizational efficiency and impact
- Resource development
New Director/VP

- Alignment with campus
- Agile planning process, agile plan
- Culture of leadership, innovation, accountability

All-Staff

- Desire for a participatory process
- See myself in the plan

Shared Recognition

- Success depends on staff engagement and development, and on user-centered services
Timeline

2011-2016 Previous Strategic Plan

August 2016
- Hire Consultants
- Form SPG
- Commit to Agile Framework

Fall 2016
- Process & Guiding Principles
- Input Sessions
- MC Launched
- SPG Launched

Fall 2016
- Sharing back to OSUL from Input Sessions
- SPG Identifies Themes
- MC does Environment Scans

Fall 2016
- MC & SPG Exchange Ideas
- All-Staff Meetings
- Themes morph into Directions & Focus Areas

January 2017
- Draft Mission and Vision Emerge

February 2017
- Feedback Gathered from OSUL
- Documents Revised

Spring 2017
- Align with OSU

Summer 2017
- UX Cohort Launched

November 2017
- Finalize, Unveil, Share, and Celebrate

December 2017
- Summer & Fall 2017
- Align with OSU Organization Design to Advance SP

Core Principles for Decision Making

Learning Curriculum

2016 (February)
New VP/Director

MC Tasked with Getting Input from their Units

MC Starts Identifying Projects that Align with SP

August 2016
- Core
- Principles
- For
- Decision
- Making

Learning Curriculum
Timeline

- **2016 (February)**
  - New VP/Director
  - Process & Guiding Principles
  - Fall Input Sessions
  - SPG Launched
  - MC Launched

- **August 2016**
  - Hire Consultants
  - Form SPG
  - Commit to Agile Framework

- **Fall 2016**
  - SPG Identifies Themes
  - MC does Environment Scans
  - Themes morph into Directions & Focus Areas

- **January 2017**
  - Draft Mission and Vision Emerge

- **February 2017**
  - Feedback Gathered from OSUL
  - Documents Revised

- **Spring 2017**
  - Align with OSU
  - Summer 2017

- **Summer & Fall 2017**
  - Align with OSU

- **November 2017**
  - Finalize, Unveil, Share, and Celebrate

- **MC Starts Identifying Projects that Align with SP**

- **October 2018**
  - Core Principles for Decision Making

- **Learning Curriculum**

- **2011-2016**
  - Previous Strategic Plan
  - Hire Consultants
  - Form SPG
  - Commit to Agile Framework

- **August 2016**
  - Input Sessions

- **Fall 2016**
  - Sharing back to OSUL from Input Sessions

- **Winter 2017**
  - MC Tasked with Getting Input from their Units

- **Fall 2016**
  - SPG Identifies Themes

- **Winter 2017**
  - MC & SPG Exchange Ideas

- **Winter 2017**
  - All-Staff Meetings

- **Summer 2017**
  - MC does Environment Scans

- **Fall 2016**
  - Themes morph into Directions & Focus Areas

- **January 2017**
  - Draft Mission and Vision Emerge

- **February 2017**
  - Feedback Gathered from OSUL

- **Spring 2017**
  - Align with OSU

- **Summer 2017**
  - Align with OSU

- **November 2017**
  - Finalize, Unveil, Share, and Celebrate

- **UX Cohort Launched**
Modeling Excellence through Strategic Planning

• Develop the full potential of employees

• Develop a culture of leadership, risk-taking, and accountability

• Center the user experience
Management Committee

Sponsor: Vice Provost and Director

Meeting Structure:
- Bi-weekly for 1.5 hours
- Vice Provost and Director sets agenda with management committee
- Any committee member can suggest agenda items
- Agenda and pre-reads will be submitted 2 weeks prior to meeting.

Charge:
This group serves as a platform to facilitate the organizational development of the University in discussing strategic priorities, capacities and needs.

Membership:
Management Committee includes all members of the Board of Trustees, University Librarians, and the Chairs of Faculty Advisory Councils, Health Sciences, Law and the regional campuses, plus any other topics under discussion.

University Libraries Management Committee

Community Expectations and Responsibilities:

Revised 9.8.17

1. Bring excitement, enthusiasm, and a sense of humor
2. Invite everyone into the conversation and avoid a few voices dominating the conversation
3. Create space for dissent: disagreement is necessary and healthy
4. Seek diverse and multiple perspectives and let the outsider in
5. Ask questions, don’t take it personally
6. Challenge the status quo and past precedent
7. Leverage, appreciate, and respect each other’s expertise and value our collective wisdom
8. Speak up if you are unsure about something, need more time, see a better way, etc. Silence equals agreement
9. Be prepared for the meeting
10. Assume positive intent
11. Own your own communications; you are responsible for sharing appropriate information with and gathering input from all relevant stakeholders to support decision making
New post on Libraries News and Information

Sign Up for the UX Cohort Mailing List
by Larry Allen

Submitted by Robyn Ness: It’s official! We now have a mailing list for the UX Cohort, OSUL’s internal group for user experience research and user-centered service design. Using this list we’ll coordinate meetings, user testing and observation sessions, as well as share occasional UX readings.

To sign up, send a message from your OSU email account to libuxcohort-join@osu.edu and then reply to the automated confirmation message to show you really mean it. Once enrolled, you will be able to send and receive messages to libuxcohort@osu.edu as we continue to build our user experience community.

Learn more about the UX Cohort: http://go.osu.edu/ulux
Departmental Assignments to Divisions

Director of University Libraries
Damon Jaggars

**Associate Director for Content and Access**
- Acquisitions
- Circulation (Including Depository)
- Collection Description and Access
- Collection Development
- Copyright Resources Center
- Interlibrary Services
- Preservation & Reformatting
- Publishing & Repository Services
- Special Collections Description and Access

**Associate Director for Information Technology**
- Applications Development and Support
- Digital Initiatives
- Infrastructure Support

**Associate Director for Research and Education**
- Assessment
- Department Libraries
  - 18th Avenue Library Architecture
  - Biological Sciences & Pharmacy
  - Fine Arts
  - Food, Agriculture & Environmental Sciences
  - Geology
  - Music/Dance
  - Vet Med
- Outreach and Engagement
- Research Services
- Teaching and Learning

**Associate Director for Special Collections and Area Studies**
- Area Studies
  - East Asian
  - Eastern European & Slavic
  - Jewish
  - Latin American
  - Middle Eastern
- Billy Ireland Cartoon Library & Museum
- Byrd Polar Research Center
- Archival Program
- Hillandale Research Library
- Lawrence and Lee Theatre Research Institute
- Ohio Congressional Archives
- Rare Books and Manuscripts
- University Archives

**Chief Administrative Officer**
- Admin Support
- Business Operations
- Communications
- Event Coordination
- Facilities / Security
- Human Resources
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<th>Content &amp; Access Division Design</th>
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# Associate Director for Research and Education

- Assessment
- Department Libraries
  - 18th Avenue Library
  - Architecture
  - Biological Sciences & Pharmacy
  - Fine Arts
  - Food, Agriculture & Environmental Sciences
  - Geology
  - Music/Dance
  - Vet Med
- Outreach and Engagement
- Research Services
- Teaching and Learning

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## Research & Education Division Design

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<td>Liaison Institute</td>
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Modeling Excellence through Strategic Planning

Develop the full potential of employees

During Strategic Planning

• Inclusive process
• Improve communication and partnership
• “Invest in People” is key supporting pillar

After Strategic Planning

• Staff development
• Professional development
• Organizational design
Modeling Excellence through Strategic Planning
Develop a culture of leadership, risk-taking, accountability

During Strategic Planning
  • What does leadership, risk-taking & accountability mean?
  • Agility and adaptability in process

After Strategic Planning
  • Leadership opportunities for initiatives
  • Include leadership in performance evaluation
  • Model learning behavior
Modeling Excellence through Strategic Planning

Center the user experience

During Strategic Planning
- Started with consultant engaging stakeholders
- Models for user-centered service design

After Strategic Planning
- Formalizing staffing commitment to UX
- Assessment initiatives
- Developing Quality of Service initiatives
Timeline

- **November 2017**: Finalize, Unveil, Share, and Celebrate

**August 2016**
- Hire Consultants
- Form SPG
- Commit to Agile Framework

**2011-2016**
- Previous Strategic Plan

**2016 (February)**
- New VP/Director

**2016**
- Fall Process & Guiding Principles
- Input Sessions

**Fall 2016**
- SPG Launched
- Fall 2016: SharePoint to OSU

**Fall 2015**
- MC & SPG Exchange Ideas
- All Staff Meetings
- Themes

**January 2017**
- Draft Mission and Vision

**February 2017**
- Feedback Gathered from OSU

**Spring 2017**
- Align with OSU
- Organization Design to Advance SP

**Summer & Fall 2017**
- Core Principles for Decision Making

**Learning Curriculum**

**MC Starts**
- Identifying Projects that Align with SP

**MC Launched**
- with Setting Input from these Units

**Documents Revised**
- UK Cohort Launched
Challenges

- Organizational change is hard
- Some staff need tangible, not abstract
- Need for shared definitions & mental models
- Not falling back on old habits, comfortable space
- Time and attention
Thank you!

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https://library.osu.edu  
personal gender pronouns: she/her/hers
Evan Simpson
Associate Dean for Research and Learning Services
Collaboration is Key

EVAN SIMPSON
NORTHEASTERN UNIVERSITY LIBRARIES
Why collaborate?

Provide good service:

• We identify and fill the gaps
• We reinvigorate/strike new partnerships to fill them

Improve our position: become embedded, gain influence

• What are our priorities? Where do we need to grow collaboration? Who can help us? Who can be a champion?
Northeastern University: landscape

The University
• 30k+ students
• Boston campus, regional campuses, & online
• Rapid ascent to top 115 Research University
• Commitment to teaching
• Experiential/Service learning

University Library
• 2 million+ visitors in Boston
• Recording Studios, 3D Studio, Digital Scholarship Group
• A digital library that serves all campuses
• E-resources/robust discovery
• Community engagement
Strategic agenda

Focused on R1 research and researchers:
• Support the research lifecycle: develop RDM services, etc.

Focused on teachers, learning, and undergrad/grad scholarship:
• Position information literacy as a critical component of a Northeastern education
• Support online learning, integrate into emerging infrastructure
• Align library thinking/strategy with the experiential learning model
Collaboration with CATLR

Services, programming, and applied research around

- Faculty development
- Accreditation and assessment
- Curricular design
- Course design/teaching transformation: classroom, online, hybrid
- Inclusive classroom and learning experiences
- SAIL: Student Assessed Integrated Learning
- Driving the experiential learning model…
Finding common ground(s)

• Common **philosophy**: service! Commitment to serving all regardless of discipline, standing, status

• Shared **mission**: support faculty/teaching; create inclusive educational experiences that are learner and learning-centric

• Overlapping/converging **services that drive mission**: outreach, consultations, and programming

• Spheres of influence: connections to Office of the Provost and deep involvement in teaching/learning initiatives
Going deeper

Services and programming:
• What “gaps and floods,” what pressures/challenges do we see?
• What does teaching/course support actually look like for each group?
• How are we working to support and drive change? What change?
• What are the opportunities to support each other?

Experiential learning
• How can a library support/contribute? **How can we be part of the model, not beside it?**
Plans

Leverage CATLR programming:
• Seed new thinking about pedagogy and engaging with library resources, services, and expertise
• Position library as source of experiential learning opportunities
• Open up broader conversations about digital scholarship

Leverage CATLR consultation services
• Help faculty integrate info literacy components into their course(s)
Teaching with Artifacts: Integrating Student Voice to Promote Deep Learning

- How can artifacts engage students in the process of meaning making and authentic experiences to achieve deep learning?
- In this session, we will explore how the rich resources in NU Libraries’ Archives and Special Collections can serve as a springboard for a pedagogical framework that invokes student voice, prior knowledge, and diverse perspectives through inquiry.
Services

Focus on online course design: matching tools with gaps

- CATLR tool: course-design rubric scores engagement across learning dimensions, resulting in refinement/development of new assignments
- Gap: how can we help faculty easily integrate online learning objects that support the development of research skills?
- Library tool: Fedora-fed WordPress site provides access to learning objects organized by the ACRL Framework
Fedora and WordPress

CATLR consultants and faculty can reference overarching info literacy concepts and identify corresponding learning objects.
Future

• Connect info literacy to the curriculum: map connections between ACRL Framework and curricular frameworks for course development: what skill areas/learning objectives of the Gen Ed curriculum map to/are supported by info/data/media literacies?

• Experiential learning: identifying specific collections, opportunities to create assignments/projects that provide hands-on experience exploring, conceptualizing, building, and experimenting with making things: metadata, datasets, online exhibits

• Integrating into orientation and other faculty programming
Thank you

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NORTHEASTERN UNIVERSITY LIBRARIES

e.simpson@northeastern.edu
Strategic Planning

Questions/comments from the audience
Thank you!