

# UNIVERSITY LIBRARIES

STRATEGIC PLAN WORKING DRAFT V. 4  
REVIEWED AND EDITED November 2022



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## MISSION

We are a catalyst and a destination elevating our community's ability to imagine, explore, discover, and create knowledge that changes lives.

## PRINCIPLES

University Libraries serves, connects, and empowers the University communities in their discovery, creation, and sharing of knowledge.

Our guiding principles are:

We build, deliver, and sustain services, expertise, and scholarly information that reflects the broad research and learning needs of our diverse and evolving communities.

We facilitate the work of research and learning communities as an accessible, welcoming, and productive virtual and physical place.

We lead initiatives and collaborations expanding our impact on the research and learning objectives of the communities we serve.

We innovate and adapt in concert with stakeholder engagement and changes in the information environment.



## KEY PERFORMANCE INDICATORS

1. Establish resource and performance benchmarks by comparative review of the UL portfolio of activities, services, staffing, and operational resources relative to aspirational peers by end of December 2023.
2. Utilizing a consultant and in conjunction with relevant university office, identify and articulate long-term facilities space plan to address needs by July 2024.
3. Build on existing Information Literacy pilot program and exhibit integration into more than 50% of University colleges by October 2024.
4. Develop and implement quantitative and qualitative instruments to measure the efficacy of library resources and services, whereby 85-95% of graduating students should report University Libraries impacted or significantly impacted their academic success by April 2024.
5. Partner with campus stakeholders to develop programming that increases awareness, engages the scholarly community, and increases support for institutional consideration for an open access policy by Fall 2024.
6. Develop and implement library training, professional development, and performance management programs by October 2023 with all library personnel participating in at least one activity annually.
7. Improve online access to special research collections by implementing and assessing an access strategy that invests in expanded functionality, discovery protocols, digitization, and integration with repository platforms by October 2024.
8. Develop appropriate curatorial and access guidelines, protocols, and agreements to steward external communities' relationships (including indigenous communities) and collections in a manner that represents the interests of all parties by October 2023.
9. Develop long-range comprehensive facilities plan for storage security, conservation, and programming supporting Special Research Collections and Archives that meets requisite industry specifications ensuring the persistence of unique and primary research materials by July 2024.
10. With university-wide stakeholders, define the scope, content, and governance of a coordinated University Archives program by March 2025.

## STRATEGIC PRIORITIES SUMMARY

Priority 1: Leverage and advance the University Libraries to position the university as a top-tier research institution

Priority 2: Contribute to student success and information fluency by leveraging library expertise and partnerships

Priority 3: Build and develop a robust offering of information resources and tools enabling affordability and accessibility

Priority 4: Embody OU's diverse community of stakeholders by establishing the UL as an inclusive place for the exchange of ideas, learning, and discovery

Priority 5: Strategically enhance, preserve, and promote our distinctive research collections and archives in the service of scholarly and creative activity

## KEY PERFORMANCE INDICATORS IDENTIFIED IN BOLD

KPIs are those outcomes considered essential to the achievement of articulated priorities and the University Libraries' support of the *Lead On* plan.



## STRATEGIC PRIORITIES, GOALS, AND OBJECTIVES

### PRIORITY 1: LEVERAGE AND ADVANCE THE UNIVERSITY LIBRARIES TO POSITION THE UNIVERSITY AS A TOP-TIER RESEARCH INSTITUTION

To align with OU Pillar 1: Become a Top-Tier Public Research University

GOAL 1. IDENTIFY AND UTILIZE COMPARATIVE ASPIRATIONAL PEERS FOR THE PURPOSE OF EVALUATING UNIVERSITY LIBRARIES' ACTIVITIES AND RESOURCES.

#### Objectives

- A. Define and implement an assessment and analytics program with appropriate expertise to assess the scope, reach, and impact of our services and programs.
- B. **Establish resource and performance benchmarks by comparative review of the UL portfolio of activities, services, staffing, and operational resources relative to aspirational peers by end of December 2023.**
- C. Establish regular review of library collection procedures and outcomes to ensure that materials support research, teaching and learning, and to ensure representation of a diverse range of publishers, subjects, treatments, formats, and viewpoints.
- D. Train relevant library personnel in established review processes for assessing academic and research programs which are being newly proposed or entering accreditation review. Ensure colleges are aware of this process.
- E. Develop and implement research services that integrate existing

GOAL 2. EXPAND CAPACITY TO INNOVATE AND PREPARE FOR EVOLVING USES AND NEEDS IN OUR PHYSICAL ENVIRONMENTS.

#### Objectives

- A. Partner with University Foundation and colleges to develop a comprehensive fundraising program to meet facility needs.
- B. **Utilizing a consultant and in conjunction with relevant university offices, identify and articulate long-term facilities space plan to address needs by July 2024.**
- C. Increase the square footage available for collections to address critical collections space shortages to enable Bizzell, branch libraries, and special collections to agilely respond to evolving user needs.

**GOAL 3. SUPPORT CAMPUS RESEARCHERS BY IDENTIFYING, DEVELOPING, AND DEPLOYING SERVICES THAT ENCOMPASS DOMAIN-SPECIFIC TOOLS, RESOURCES, AND EXPERTISE.**

*Objectives*

- A. Develop, recruit, and position functional expertise to support campus research needs across university disciplines, for example, disciplinary liaisons, archivists, data analytics specialists, informatics specialists, and research data management services.
- B. Collaborate with OU Human Resources to implement flexible recruitment practices that enhance UL ability to attract and retain specialized talent and expertise throughout the libraries.
- C. Investigate and pursue joint appointments and grant funded positions to expand our impact in campus research activity.
- D. Develop a program strategy to bring the Libraries' digital strategies to a resource and service level commensurate with aspirational peer institutions.



PRIORITY 2: CONTRIBUTE TO STUDENT SUCCESS AND INFORMATION FLUENCY BY  
LEVERAGING LIBRARY EXPERTISE AND PARTNERSHIPS

To align with OU Pillar 2: Prepare Students for a Life of Success, Meaning,  
Service, and Positive Impact

GOAL 1. CREATE INFORMATION LITERACY PROGRAMS SCAFFOLDED WITHIN ACADEMIC PROGRAMS.

Objectives

- A. Create awareness of and promote the framework to department stakeholders on the Association of College and Research Libraries' Framework for Information Literacy for Higher Education and promote its adoption.
- B. Develop a curriculum that addresses these goals and collaborate with department stakeholders to embed that content through all levels of course work.
- C. **Build on existing information literacy pilot program and exhibit integration into more than 50% of University colleges by October 2024.**

GOAL 2. ENSURE ENGAGEMENT-DRIVEN DESIGN TO SUPPORT THE NEEDS OF OUR DIVERSE COMMUNITIES.

Objectives

- A. **Develop and implement quantitative and qualitative instruments to measure the efficacy of library resources and services, whereby 85-95% of graduating students should report University Libraries impacted or significantly impacted their academic success by April 2024.**
- B. Utilize student and faculty groups to monitor evolving information needs and experiences, review our current portfolio of services, and adjust as necessary.
- C. Create a virtual library environment that complies with ADA requirements and provides a consistent experience across OU communities comparable to in-person offerings.



## PRIORITY 3: BUILD AND DEVELOP A ROBUST OFFERING OF INFORMATION RESOURCES AND TOOLS ENABLING AFFORDABILITY AND ACCESSIBILITY

To align with OU Pillar 3: Make OU's Excellence Affordable and Attainable

GOAL 1. DEVELOP AND IMPLEMENT TOOLS THAT FACILITATE FINDING AND UTILIZING HIGH QUALITY OPEN ACCESS (OA) RESOURCES.

*Objective*

- A. Implement and promote library tools and platforms - local and commercial - that facilitate finding, accessing, and utilization of OA resources.

GOAL 2. EXPAND ACCESS TO SERVICES, RESOURCES, TECHNOLOGY, AND SPACES THAT PROMOTE STUDENT SUCCESS.

*Objective*

- A. Investigate, develop, and implement a controlled digital lending program to expand access to materials and aid in preservation.
- B. Identify and create user-centered spaces to accommodate sensory needs, life stages, experiences, and other identified needs.

GOAL 3. FACILITATE DISCOURSE AND WORK WITH UNIVERSITY ADMINISTRATION AND STAKEHOLDERS TO PROPOSE A CAMPUS-WIDE OPEN ACCESS POLICY.

*Objectives*

- A. Position the Libraries as a venue of choice for high profile scholarly events.
- B. **Partner with campus stakeholders to develop programming that increases awareness, engages the scholarly community, and increases support for institutional consideration for an open access policy by October 2024.**

GOAL 4. ESTABLISH PRACTICES AND PARTNERSHIPS THAT SUPPORT OPEN ACCESS SCHOLARSHIP, EDUCATIONAL RESOURCES, AND JOURNAL PUBLISHING.

*Objectives*

- A. Assess, advocate for, and secure funding support for open access scholarship.
- B. Hire Director of Open Initiatives and Scholarly Communication to administer and expand our Open Initiatives.

UL PRIORITY 4: EMBODY OU'S DIVERSE COMMUNITY OF STAKEHOLDERS BY ESTABLISHING THE UNIVERSITY LIBRARIES AS AN INCLUSIVE PLACE FOR THE EXCHANGE OF IDEAS, LEARNING, AND DISCOVERY

To align with OU Pillar 4: Become a Place of Belonging and Emotional Growth for All Students, Faculty, Staff, and Alumni

GOAL 1. IMPROVE OUTREACH TO STUDENT COMMUNITIES INCLUDING INTERNATIONAL STUDENTS, FIRST GENERATION STUDENTS, AND OTHER UNDERREPRESENTED POPULATIONS.

*Objective*

- A. Establish program and liaison librarian positions to deliver support to non-academic units, focusing on international student community, first generation students, and other underrepresented populations (i.e., PIPELINE and other student transfer programs) to improve their awareness, engagement, and student outcomes.
- B. Collaborate with student support units across campus to promote student wellbeing.

GOAL 2. IMPLEMENT PROCESSES AND POLICIES THAT ENSURE OUR PHYSICAL AND VIRTUAL PRESENCE IS ACCESSIBLE TO ALL STAKEHOLDERS.

*Objectives*

- A. Partner with relevant campus entities to complete an ADA audit of physical spaces.

GOAL 3. SERVE AS A FACILITATOR AND VENUE FOR INTELLECTUAL ENGAGEMENT AND OPPORTUNITIES FOR THE OU AND EXTENDED COMMUNITIES.

*Objectives*

- A. Lead and collaborate with academic units across campus to position the Libraries as a venue of choice for high profile scholarly and cultural events.

GOAL 4. DEVELOP A SUPPORTIVE WORKPLACE THAT INCORPORATES INCLUSIVITY, PROMOTES RETENTION, AND PROVIDES OPPORTUNITIES FOR PROFESSIONAL GROWTH.

*Objectives*

- A. Employ best practices for inclusive employee recruiting, retention, and development.
- B. **Develop and implement library training, professional development, and performance management programs by October 2023 with all library personnel participating in at least one activity annually.**

UL PRIORITY 5: STRATEGICALLY ENHANCE, PRESERVE, AND PROMOTE OUR DISTINCTIVE RESEARCH COLLECTIONS AND ARCHIVES IN THE SERVICE OF SCHOLARLY AND CREATIVE ACTIVITY

To align with OU Pillar 5: Enrich and Positively Impact Oklahoma, the Nation, and the World through Research and Creative Activity

GOAL 1. INCREASE VISIBILITY, IMPACT, AND ACCESSIBILITY OF SPECIAL RESEARCH COLLECTIONS.

*Objectives*

- A. Recruit an Associate Dean for Special Research Collections to lead the development, direction, coordination, prioritization, promotion, and relationship management of the University Libraries' Special Research Collections.
- B. **Improve online access to special research collections by implementing and assessing an access strategy that invests in expanded functionality, discovery protocols, digitization, and integration with repository platforms by October 2024.**
- C. Expand partnerships with historically excluded groups and stakeholders who are either represented in our collections or who may be the source of future or expanded collections.
- D. Develop appropriate curatorial and access guidelines, protocols, and agreements to steward external communities' relationships (including indigenous communities) and collections in a manner that represents the interests of all parties by October 2023.
- E. Identify and pursue grant opportunities that enable expanded capacity to manage, acquire, preserve, and curate growing Special Research Collections.
- F. Develop and invest in relationships with individuals, groups, and organizations to encourage donation of significant and distinctive research materials.

GOAL 2. PURSUE LONG TERM SOLUTIONS TO PROVIDE SECURE FACILITIES THAT WILL PRESERVE AND PROTECT OU'S DISTINCTIVE RESEARCH COLLECTIONS.

*Objectives*

- A. Develop long-range comprehensive facilities plan for storage security, conservation, and programming supporting Special Research Collections and Archives that meets requisite industry specifications ensuring the persistence of unique and primary research materials by July 2024.

**GOAL 3. PRESERVE THE UNIVERSITY'S LEGACY THROUGH THE ESTABLISHMENT AND SUPPORT OF A COMPREHENSIVE UNIVERSITY ARCHIVES PROGRAM.**

*Objectives*

- A. With university-wide stakeholders, define the scope, content, and governance of a coordinated University Archives program by March 2025.
- B. Recruit a University Archivist to lead a team dedicated to records management, managing the University's physical and digital archives.

**GOAL 4. PRESERVE AND PROMOTE OKLAHOMA'S UNIQUE CULTURAL HERITAGE BY INVESTING IN DEVELOPING SPECIAL RESEARCH COLLECTIONS IN AREAS OF STRENGTH.**

*Objectives*

- A. Develop a collaborative approach to identify and create digitization priorities for special research collections.



## APPENDIX I: APPROACH

### OVERVIEW

During Fall 2021, the leadership team developed a framework for strategic planning that prioritized the following: participation across the organization; operational data across the organization; institutional plans; environment scanning; and stakeholder feedback.

The objective was to articulate a forward-leaning, stakeholder-influenced strategy linked to OU's Lead On strategic plan shaping the University Libraries' (UL) priorities from 2022 to 2027.

### PROCEDURE

UL employees were organized into five teams to complete mission and principle articulation, data gathering, developing thematic and directional definition, UL priorities and goals. An integrated team was then assembled to define the strategic objectives of the plan.

Team 1 was charged with creating the mission for the UL. The team worked with UL departments to gather information about how departments and those within UL view the purpose of a research library in today's world. The mission statement articulated how University Libraries fits within the Lead On, University Strategic Plan as well as the UL's purpose in the University of Oklahoma ecosystem.

The members of Team 2 focused on gathering information from UL colleagues to inform the eventual development of a brand for University Libraries. This group helped define how University Libraries presents itself to OU and the broader community. The developed principles will help communicate to our stakeholders what they should expect from and experience when engaging with University Libraries.

The third team was divided into two: Teams 3A and 3B. The Environmental Scan Team, Team 3A, collected data about changes in our information ecosystem (technologies, user perspectives & behaviors, publishing/content developments, utilization/services transactions and other indicators of current demands and emerging trends). The means of obtaining data/information included stakeholder engagement across user communities, reviewing institutional strategic plans from other OU colleges and units, mining relevant external data and reporting, as well as reflections from within the Libraries. The team collected the views of our stakeholders about the challenges and opportunities related to their informational needs in the areas of learning, teaching, and research. This data/information informed what needed resources, services, and programs should become strategic priorities for University Libraries.

Team 3B, the Environmental Scan Team for Analysis & Synthesis team, created a meaningful understanding of the data collected by the data gathering team. The team provided a thoughtful summary of key findings and strategic themes from the data. These

themes were used to identify strategic priorities and goals within the strategic plan, including new or enhanced services, resource development, expertise, infrastructure, etc., based on the directions resulting from thematic analysis.

Team 4, the Directions, Goals & Objectives Team, articulated the directions, goals and objectives of the strategic plan for the next 5 years. This team built on the work done by the environmental scanning and analysis teams. Using the strategic themes identified by analysis of the environmental scanning team, this team created strategic and transformational goals to improve and enhance the resources, services, programs, and staffing offered by University Libraries.

Finally, Team 5 focused on communication and vetting of the Strategic Plan. It will ensure methods of monitoring and communicating implementation and outcomes throughout the life of the Strategic Plan. This phase is critical to the plan's success because it is how we introduce the plan to our stakeholders, develop methods of accountability to ensure we continue to make forward progress, and communicate successes as we make progress.

The Senior Management Team revised and finalized the contents of the strategic plan before submitting to the provost's office.



## APPENDIX II: ACKNOWLEDGEMENTS

The entire UL organization was invited to participate in the strategic planning process. We thank the colleges providing their strategic plans for review.

The following individuals gave their time to the plan teams and were integral to the completion of the UL strategic plan.

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Tyler Franklin	Tyler Pearson	
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Senior Management Team

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