



Strategic Design

Fall 2017 - Summer 2020

Steering Committee Preliminary Report
July 2017

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Executive Summary

In November 2016, the University Libraries (UL) began a strategic design process with the goals of defining a clear vision for our future, outlining new conceptions of academic content and information, and identifying where we needed to shift investments to meet the emerging needs of the communities we serve. The strategic design steering committee has identified and developed the following five themes around which our strategic design is shaped:



Scholarly Information Life Cycle

From creation to curation: partnering in knowledge discovery, production, and dissemination.



Educational Experience

Enriching teaching and learning endeavors across campus by providing relevant collections, research expertise, and welcoming spaces.



Technology & Digital Infrastructure

Creating and supporting technologies to meet research, teaching, and learning needs.



Strategic Partnerships

Building partnerships across and beyond UB to strengthen the cultural vitality of WNY and improve the economic well-being, social equality, and health of all New Yorkers.



Employee Empowerment

Sharing information, authority, and resources so that all employees can take the initiative to solve problems and be accountable for actions and outcomes.

Working groups gathered information on each of these themes and consulted with over 200 external stakeholders (UB administrators, faculty, students, staff, alumni, and key regional and national partners) using a wide variety of methods. The working groups provided the steering committee with observations about the roles that information tools and services play in the work of our stakeholders and with recommendations about where the UL could shift, augment, and/or add to current areas of emphasis.

The immediate next steps are to engage the UL staff in making additional recommendations, refining recommendations into actionable steps, and prioritizing recommendations and action steps. This steering committee report has been shared with the UL staff, along with a call for additional recommendations. In addition, a call for UL volunteers to serve on five cross-unit implementation teams corresponding to each theme has been issued. Prioritized recommendations, which will be shared widely with the campus in the fall, will guide UL activities and the resource allocation to support those activities through 2020.

Introduction

As the University at Buffalo's (UB) research, educational, and outreach priorities have evolved, the University Libraries' (UL) collections and service portfolios have evolved as well. We have joined the university in its commitment to creating visionary solutions to our society's greatest challenges. The UL has transformed its collections, services, spaces, and staffing in order to meet the changing needs of UB's faculty and students in a highly networked environment. The UL's administrative reorganization in early 2015 aligned the libraries to serve the research, learning, teaching, and outreach missions of the university. In order to continue to serve as the university's academic and interdisciplinary hub, the UL must continually re-examine its priorities, processes, policies, and practices.

The UL strategic design process, which began in November 2016, has included extensive interactions with key constituency groups. Our goals are to define a clear vision for the future of the UL, outline new and different conceptions around academic content and information, and identify where we need to make new investments to meet the emerging needs of the communities that the UL serve. The result is a strategic design that is meant to be both practical and inspirational, a continuation of the UL's proud history and indicative of our bold aspirations for the future.

Our strategic design process engaged the faculty, students, and broader UB and higher education communities in considering ways that the UL can help advance the larger missions of the institution by:

- participating in major initiatives that leverage expertise within the libraries;
- creating effective partnerships with other institutional units, as well as regional, state, national, and international entities;
- enriching the intellectual life of the university; and
- transforming the scholarly communication ecosystem.

The UL strategic design aligns with UB's ambitious vision, UB2020, as outlined in the Realizing UB 2020 initiative, to *"elevate and strengthen the academic profile of our university in order to: advance excellence across the research enterprise, provide our students with an exceptional education, and deepen our impact on the broader communities we serve locally and globally."* The libraries embrace the opportunity

to drive the university forward toward meeting these objectives and we recognize that we must be flexible and responsive to the evolving needs of the campus in order to do so. The university's guiding objective is reflected in the libraries' mission to *"Provide outstanding resources, experts, services and spaces to enrich the research, learning, teaching and creative activities of UB faculty, students and staff, as well as those of the local and global community members we serve."*

The UL's goals support UB's vision of excellence in research, teaching, learning, and engagement. The UL's unique position as both an academic support unit and a research unit in its own right enables the UL to provide leadership across the entire life cycle of scholarship, from the creation of knowledge to the dissemination and advancement of scholarship to the curation of information.

Our immediate next steps are to implement the recommendations made through this initial phase of the strategic design process, provide updated information on our progress to as many constituencies as possible, and continue to engage the campus and the higher education community in the generation of ideas about how the UL can assist, partner, and lead UB in meeting its ambitious goals.

Development of Strategic Design Themes

Based on a scan of the academic library landscape and discussions with university senior leadership (provost, deans, vice presidents, and vice provosts), the UL Faculty Executive Committee, the UL Professional Executive Committee, and the University Faculty Senate Library committee, the strategic design steering committee identified and developed the following five themes around which our strategic design is shaped:



Scholarly Information Life Cycle

From creation to curation: partnering in knowledge discovery, production, and dissemination.



Educational Experience

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Technology & Digital Infrastructure

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Strategic Partnerships

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Employee Empowerment

Sharing information, authority, and resources so that all employees can take the initiative to solve problems and be accountable for actions and outcomes.

A pair of co-chairs (consisting of one UL staff member and one UB community member from outside the UL) led the work of engaging with the campus around each theme. The task of the thematic working groups was to give a report to the strategic design team, outlining key issues and making initial recommendations. The working groups determined how best to conduct their work, which consisted of interviews, focus groups, and surveys. The working groups' extensive and in-depth work with UL stakeholders was deliberately designed to explore the benefits, challenges, likelihood, and desirability of various forces shaping the future of research, teaching, learning, outreach, and work in higher education.

The working groups prepared written briefings on each thematic topic that included:

- observations regarding the current state of the UL;
- identification of intersections where the UL could partner most effectively with other internal and external partners;
- recommendations about where the UL needed to shift, augment and/or add to current areas of emphasis;
- an outline of what new services are needed at UB that the UL might develop or support;
- a discussion of the types of investments the UL should consider making; and
- initial recommendations for action.

The briefings provided the strategic design steering committee with increased knowledge about the landscape of higher education, future scenarios for research and learning, technological horizons, and the roles the UL could play in furthering the missions of UB. The briefings also alerted the strategic design steering committee to trends in campus opinion on these matters, including areas of potential controversy, as well as areas of common ground.

The observations and recommendations outlined below are based on the extensive information gathering done by the strategic design working groups. The working groups engaged UB administrators, faculty, students, staff, alumni, and key regional and national partners. Multiple approaches were employed to gather information from our stakeholders, including in-depth interviews, small group meetings, and facilitated focus groups. In total, over 200 external stakeholders participated in our process.

All groups deliberately used an open approach that focused on the needs of our user communities, rather than predetermined conceptions of what libraries could provide. The working groups focused on understanding the roles information and information tools and services play in the work of our stakeholders. Rather than asking narrow questions about satisfaction with traditional library services, for example, the working groups asked our communities to think broadly and imaginatively about information cultures in their disciplines and their scholarly, civic, and creative lives.



Theme #1: **Scholarly Information Life Cycle**

Introduction

The UL are stewards for the discovery, use, and creation of knowledge at the university. Advances in digital technologies and collaboration across our community have rapidly changed the life cycle of scholarship on campus. The libraries play an essential part in addressing three broad classes of challenges as they relate to the evolving scholarly information life cycle: knowledge discovery, knowledge production, and knowledge dissemination. The UL can strategically position themselves as integrated partners with UB faculty and students throughout this life cycle.

Observations

All points in the scholarly information life cycle are affected by digital technology. Most scholarship creation now happens in the digital environment. Discovery and dissemination of scholarship have been positively transformed across disciplines, and

digital technology has allowed scholarly activity to become increasingly collaborative. However, digital preservation is an issue for members of the faculty in many different fields. Preservation of research data is an area of particular concern.

UB scholars want to know who on campus is doing research in what areas, where they can turn to find research outside of their fields, and whether or not the facilities they need for their research already exist.

Faculty are also concerned with limited and competitive funding opportunities and the impact this has on the pursuit of their research interests. Scholars representing humanities and social sciences are particularly aware of the limited resources available to them to support the creation of scholarship despite the traditional expectation of production in the academic arena.

Recommendations

Knowledge Discovery: The UL are well positioned to lead or collaborate on campus initiatives to create and encourage communication among scholars and across academic units. The staff of the UL is well placed within the community to make these connections as the libraries already serve the research needs of the entire UB community.

The libraries have the expertise to lead or support education initiatives in the areas of scholarly communication including copyright compliance, data curation, digital humanities, digital preservation, open educational resources and publishing, research analytics, and reference management.

Knowledge Production: The UL can potentially facilitate greater productivity among scholars by exploring experimental open access subvention funding models that are supported by a dedicated university development fund or campaign.

The UL can facilitate greater productivity among scholars – especially those in the humanities and social sciences – by supporting open access monograph publishing initiatives.

The university should explore new opportunities in library publishing as a possible alternative form of faculty support and as part of a broader commitment to an integrated open access environment.

Curation of research data is a leading concern among UB scholars. The UL can explore how libraries at peer institutions have created partnerships with other campus stakeholders to develop data curation programs.

Knowledge Dissemination: Robust institutional archives, particularly a system for digital preservation, will boost the impact and visibility of UB scholarship and of the UL's Special Collections, and will also strengthen the competitiveness of university-generated grant proposals.

The UL should lead digital preservation initiatives that support large-scale open disciplinary repositories and digital archives that increase accessibility, visibility, and impact of scholars' work.



Theme #2: Educational Experience

Introduction

The UL provide relevant collections, research expertise, and welcoming spaces that enrich teaching and learning endeavors across campus. Two themes emerged from our meetings with faculty, teaching assistants, and staff who provide academic support and from our surveys and focus groups with students (graduate, professional, and undergraduate). First, the UL can increase its educational impact by focusing on strengthening librarian/instructor relationships and, second, the UL can promote student success by developing innovative strategies for providing pedagogical support at the time of need.

Observations

Faculty Perspective: Faculty expectations of librarians is traditional; faculty expect librarians to assist with finding resources using databases. The faculty preference for communications from librarians is any method except for email.

Faculty voiced concerns about the lack of library training for new teaching assistants, and the lack of library refreshers on the latest research tools, software, and publishing opportunities for both faculty and TAs.

Student Perspective: Student expectations of librarians reflect our instant gratification culture. They expect to obtain research support at the time of need and in a manner in which they are comfortable. Students prefer to ask their instructors or their peers for research assistance rather than asking a librarian.

Students voiced concern about gaps in information literacy skills and gaps in skills needed for graduate school or on the job such as digital technologies for data analysis and visualization.

Recommendations

Faculty Perspective

- Develop, in conjunction with the Libraries' Communications Team, a teaching brochure based on ACRL's *Framework for Information Literacy for Higher Education* to educate faculty on the librarian's role in teaching and learning.
- Develop, in conjunction with the Vice Provost for Faculty Affairs, a library welcome packet for new faculty.
- Develop the ability to support last minute requests for in-class library instruction from TAs and faculty.
- Develop online workshops for faculty and TAs on topics such as publishing, analytics, and organizing their research.
- Integrate librarian support into 500-level prose seminar courses and in graduate student symposia.

Student Perspective

- Develop library instruction in the first year (UG).
- Employ peer research tutors (rising juniors) trained by librarians (UG).
- Develop certification programs for students, such as an online advanced information and digital fluency certificate (UG).
- Develop library workshops held in the evening on topics such as publishing, presenting, citation management, data analysis, and effective writing (UG seniors and graduate students).



Theme #3: Technology & Digital Infrastructure

Introduction

The working group on Technology & Digital Infrastructure asked the following questions of senior administrators and faculty:

- What technological trends in the scholarly publications cycle are you seeing in your field? What pain points do you experience in this cycle? What frustrates you?
- What types of digital scholarship do you find exciting?
- What digital competencies do students and researchers need?

Observations

The most frequent response to the question concerning technological trends in the scholarly publication cycle and its associated pain points relate to federal grant funder requirements for open access (OA) journal publication. The working group noted that faculty find themselves between the rock of federal grant funder requirements for OA publication and the hard place of an OA publication landscape rife with predatory journals, high article processing charges, and the pitfalls of distinguishing between a predatory OA journal and a reputable one.

Input from faculty indicated that the term “digital scholarship” is unclear. The working group noted that respondents tended to interpret both “technology” and “digital scholarship” in terms of how they access information as users, rather than how they use it in the creation of scholarship. Faculty expressed concern with using online journal submission systems. One respondent stated, “online submission systems...make the authors do all the work for the convenience of the publisher.” The working group feels that there is a need for transitioning analog scholarship creation skills to the digital journal submission landscape.

Faculty noted that for the most part, they do not have the technology skills necessary to create digital content. One respondent indicated that “she’d be happy if faculty could

make a short video promoting their work and create content needed for MOOC's." The working group found that staffing and expertise to create digital content is a real need expressed by multiple respondents.

Students and researchers should have digital competencies in digital media, data analysis software applications, and in standard word processing and spreadsheet programs. Concern was expressed that no one on campus was documenting choices of technology resulting in a plethora of tools and services offered by many units that are so unevenly dispersed that the available resources are hard to discover.

Recommendations

Access and Resources

- UL should publicize existing library support for content creation such as the one-button studios in Capen. The services of the Center for Educational Innovation (CEI) should be publicized as respondents to survey were unclear about the services of the CEI.
- UL should explore whether or not it is within the mission of the libraries to provide digital creation services (creating videos that incorporate graphics and animations) for the faculty.

Training and Digital Competencies

- Expand the library workshop opportunities on digital competencies for faculty and students, especially in the areas of digital data analysis and digital object creation.
- Establish a pilot program to embed liaisons on departmental curriculum committees in an academic department to develop a professional development requirement and offer workshops in digital scholarship.

Research and Learning Environments

- Compile a listing of all digital services offered at the university and place on the libraries homepage.
- Continue to create video tutorials on various aspect of technology to be located on UL's YouTube channel which will address digital literacy and effectively market the work that UL does in the university community.



Theme #4: **Strategic Partnerships**

Introduction

The Strategic Partnerships Working Group examined current UB partnerships to determine how collaboration with the UB Libraries could add value to those relationships. Given the broad nature of this topic, the working group narrowed its focus to partnerships that engage both the university and the community. The working group launched its investigation by calling together focus groups in order to learn about the various ways in which individual UB schools and centers currently engage with local schools, businesses, non-profit agencies and the Western New York community. The focus groups were not only well attended, but participants found the conversations so rich that they asked that the focus groups be continued.

Observations

Our findings suggest a lack of awareness about the services, collections, and expertise available from the libraries, but that very real opportunities exist for the libraries to play larger and more impactful roles in supporting and collaborating on many of the current partnerships at UB, and in doing so, bring value to all groups involved. Our observations suggest that the libraries are well positioned to improve strategic partnerships on campus by focusing on the following areas: archival activity, meeting and community space, information retrieval, data management, university collaboration, and alumni engagement.

Recommendations

Archival Activity

- Develop an ongoing program to digitize cultural heritage projects and curate community-focused collections, not just those connected to the university.
- Promote a documented history of UB. The libraries could serve as the source and authority for information regarding UB's history. The background of key figures associated with the university such as Bell, Jarvis, Ketter, Fillmore, etc. are relatively unknown to many faculty, staff, and students.

- Help to communicate UB's story to the WNY community.
- Develop an oral history program for the university community or for a community initiative.
- Create a working catalog for current and past UB community projects. This catalog could be used as a reference when expanding upon ongoing projects or initiatives.

Meeting and Community Space

- The libraries have an opportunity to provide technology-enabled meeting space on all campuses for internal meetings, as well as campus and community events.
- The use of technology for video-conferencing and the ability to meet remotely is a key issue for university faculty and staff. The UL could explore the acquisition of software for video-conferencing.
- Utilize the libraries video recording studios as a means of promoting the libraries. The working group found that most focus group participants were not aware the libraries have one-button video studios available for use.
- Information for use of and access to current meeting space should be widely disseminated to the university community, as well as to those at UB who engage an external audience.
- Create a faculty commons within the libraries, an area for faculty to meet and/or conduct research.

Information Retrieval

- Numerous k-12 camps are held each year at UB involving many university units. There is a need for background or supplemental materials for each program, and the Libraries could assist in providing informational materials for these camps.
- The libraries could provide research assistance and/or supplemental information for grant writing or ongoing research for community projects.
- The libraries are a source of videos and other supplemental materials that could be used for community-based initiatives such as wellness fairs or clinics.
- Provide updated statistics and critical data about UB's strategic partnerships for student-related events, especially those that involve recruitment.
- Background information is needed when students are engaged in UB-related activities off campus. The libraries could assist students in finding information about where they went and what they saw while engaged in these activities.
- Promote the libraries capability to provide research assistance for grant writing and ongoing community research initiatives.
- Conduct environmental scans, when requested, for decanal and student support units.

- As a university-wide initiative, create and distribute a strategic partnership fact sheet about who we are (UB) and what we do.
- Identify funding opportunities for potential grants around community partnerships.

Data Management

- Provide assistance with data analytics.
- Utilize student expertise with managing data, especially those disciplines that focus on data analytics, such as the UB School of Management.
- Acquisition of databases or licensing agreements to assist faculty with research, such as ISO, the International Organization for Standardization.

University Collaboration

- Create a position for an outreach coordinator for the libraries, or include university outreach collaboration in the current duties of key existing staff.
- The libraries could serve as university-wide conveners by bringing units together on a regular basis to share news about collaborative activity. UB currently does a great deal of engagement and there is no easy way to discover this information.
- Highlight what is happening in each school at UB in terms of strategic and community partnerships. As the libraries are integral to all units at the university, we could keep units informed and connected by featuring each school's partnership activities and accomplishments at different times throughout the year.
- Key library administrators could have a place on decanal unit advisory boards and/or executive councils.
- Embed subject librarians in university initiatives such as the UB Communities of Excellence.
- Subject librarians could strengthen relationships and outreach activities with local k-12 students. Send library experts to local libraries or schools.
- The libraries could assist in teaching college readiness by partnering with area secondary schools, particularly those in underserved neighborhoods.
- Promote UB and the libraries to underserved groups.
- Promote the University Archives and offer tours to faculty and staff.

Alumni Engagement

- Provide educational webinars for UB alumni on varied and trending topics, such as fake news.
- Simplify the process for accessing library materials for alumni. In doing so, alumni could be more actively engaged with the libraries and consequently with the University as a whole.



Theme #5: Employee Empowerment

Introduction

The working group approached the exploration of this topic with this definition of employee empowerment:

Empowerment: A management practice of sharing information, rewards, and power with employees so that they can take initiative and make decisions to solve problems and improve service and performance. Empowerment is based on the idea that giving employees skills, resources, authority, opportunity, motivation, as well as holding them responsible and accountable for outcomes of their actions, will contribute to their competence and satisfaction.

Observations

Responses to a staff survey revealed a number of common overarching themes, including: accountability, autonomy, communication (having a voice and being listened to), transparency, support, and trust.

The survey revealed that respondents have a different definition of empowerment. A summary of the results of this question revealed that:

[E]mpowerment means having the autonomy to make decisions without seeking approval from other people within the organization or being fearful of repercussions. Contributions and ideas are valued, and employees receive support and encouragement from their supervisors and colleagues. Trust is implicit. There are chances to advance and participate on committees. Employees are well informed and are sure of their roles.

30% of UL staff responded to an anonymous survey on employee empowerment. Results showed that 61% of employees responding strongly agree or agree that they feel empowered in their current work environment. On the other hand, 62% of employees responding agree or strongly agree that there are obstacles in their work environment that

prevent them from feeling empowered. The main obstacles identified are communication, staffing shortages, and workload.

Recommendations

From Respondents:

- Encourage communication between all levels of the organization.
- Encourage innovation.
- Foster an environment of trust.

From the Working Group: The Employee Empowerment working group recommends that the Strategic Design Committee include acknowledgement of Employee Empowerment when developing its new plan. Empowerment is identified as an important aspect in the UL work environment. The subcommittee suggests that the interconnected themes that emerged from the survey—accountability, autonomy, communication, transparency, support, and trust – be considered when implementing programs and training for all levels of staff to foster employee empowerment.

Conclusion

The UL will continue to serve as a gateway to diverse collections of information resources. The UL will also continue to serve as an intellectual hub of the campus, as a learning environment in which we provide a range of collections, tools, technologies, spaces, and services to the UB community. Implementing the UL's strategic design will enable us to place the scholar at the center of our activities, help faculty increase their research productivity and research impact, help students discover and create new knowledge, and help our community members pursue intellectual and creative inquiry.

The role of the librarian that emerges from the strategic design process is to provide expertise in **all** information-related aspects of the research life cycle. Such activities may include (but are not limited to) the discovery of existing content; strategies to keep up with current research trends; facilitation of strategic partnerships; research impact assessments; data management planning and execution, analysis and computation; and dissemination and curation of information. Librarians both provide expertise regarding

tools and approaches throughout the research life cycle and steward the outcomes of research for the benefit of the widest possible community.

The UL are increasingly involved in support of the creation, discoverability, and curation of institutional information (research data, preprints, scholarly profiles, digitized special collections etc.). The UL also “facilitates access to a coordinated mix of local, external and collaborative services assembled around user needs and available on the network” (Lorcan Dempsey, *The Facilitated Collection*, <http://orweblog.oclc.org/towards-the-facilitated-collection/>). Although the “collections” that the UL support have changed dramatically in the networked landscape of scholarship, the UL continues its roles in the organization, discoverability, and stewardship of those “collections.”

Next Steps

The immediate next steps are to engage the UL staff in making additional recommendations, refining recommendations into actionable steps, and prioritizing recommendations and action steps. In order to accomplish this, the strategic design steering committee report will be shared with the UL staff by August 7, 2017 with an accompanying call for additional recommendations. The call for recommendations will be open for two weeks; submission of recommendations may be made anonymously and there will be no limits to the number of recommendations any one individual or group may make. Recommendations will be synthesized, classified, and prioritized by the AULs, the chair of FEC, and the past chair of the PEC by August 30, 2017.

Prioritized recommendations will guide UL activities and the resource allocation to support those activities through 2020. The prioritized list of recommendations will be shared widely across the entire UB community.

A call for UL volunteers to serve on five cross-unit implementation teams corresponding to each theme will be issued at the same time as the call for additional recommendations. These teams will be charged with overseeing the implementation of the recommendations listed in the strategic design steering committee report, as well as those made by the UL staff; refining, managing, and communicating recommendations; soliciting further recommendations from a wide range of stakeholders; and assessing the results of implemented recommendations.

Each implementation team will have five UL staff members. The implementation team will select its own chair—all members of the team are eligible to serve as chair. The teams will be charged with working the duration of the strategic design (Fall 2017–Summer 2020); initial members will be randomly assigned either one-year or two-year terms so that there are opportunities for new members to join the team at later dates while ensuring a certain degree of continuity. Criteria for serving on the teams will be broad and inclusive in order to encourage engagement. Any UL staff member may volunteer to serve on any team. Team members should be those that:

- Express interest in moving the UL’s strategic design forward.
- Possess project, program, communication, and time-management skills.
- Have experience in, or would like to gain experience in, working on or leading a team.
- Are able to meet deadlines.

The UL members of the strategic design steering committee (with the exception of the VPUL)—the AUL for Discovery & Delivery, the AUL and Vice Dean for Legal Information Services, the chair of FEC, and the past chair of PEC—will make final decisions regarding team membership. Team membership will be announced August 30, 2017; teams will be charged and begin their work September 5, 2017.

The strategic design implementation teams will continue to use strategic design principles in refining existing recommendations, calling for new ideas, and creating new action steps. In other words, the work of the five strategic design implementation teams itself will be a means to achieving one of our themes: empowering employees.

The strategic design steering committee report and final recommendations will be widely shared on campus at the beginning of the fall 2017 semester. Multiple means of giving feedback, comments, and suggestions will be provided. The UL communications team will be responsible for the dissemination of the strategic design, as well as in soliciting and gathering feedback.

Implementation of the strategic design recommendations will begin in the fall of 2017. Ongoing assessment is already part of the UL organizational culture. Assessment will be explicitly woven into the communication about the strategic design process and assessment measures will be articulated for each recommendation. The implementation teams will work closely with the UL assessment officer in assessing the progress of the strategic design.

Appendices

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A. Steering Committee Members and Working Group Co-chairs

Charged by UB Provost Charles Zukoski in November 2016, the steering committee members are:

- Austin Booth (Chair): Vice Provost for University Libraries
- Beth Adelman: School of Law and University Libraries; UB Faculty Senate Library Committee member
- Susan Dow: University Libraries; UL Faculty Executive Committee (FEC) chair
- Damien Keane: Department of English, College of Arts & Sciences; UB Faculty Senate Library Committee chair
- Shiu-Ming Kuo: Department of Exercise and Nutrition Sciences, School of Public Health and Health Professions; UB Faculty Senate Library Committee member
- Charles Lyons: University Libraries
- Sarah Pinard: University Libraries; Professional Executive Committee (PEC) chair

Working groups, each led by two co-chairs, engaged the campus in explorations of five broad themes:

Theme #1: Scholarly Information Life Cycle

- Co-chair: Jeffrey Good, Linguistics Department, College of Arts and Sciences
- Co-chair: Christopher Hollister, University Libraries

Theme #2: Educational Experience

- Co-chair: Kim Connolly, School of Law
- Co-chair: Cynthia Tysick, University Libraries

Theme #3: Technology & Digital Infrastructure

- Co-chair: Nick Wasmoen, Department of English, College of Arts & Sciences
- Co-chair: Karlen Chase, University Libraries

Theme #4: Strategic Partnerships

- Co-chair: Stephen Abel, Periodontics and Endodontics Department, School of Dental Medicine
- Co-chair: Denise Wolfe, University Libraries

Theme #5: Employee Empowerment

- Co-chair: Kesha Lanier, Office of Equity, Diversity and Inclusion
- Co-chair: Lori Widzinski, University Libraries

B. Strategic Design Themes: Description, Goals, & Examples

Theme #1: Scholarly Information Life Cycle

From creation to curation: partnering in knowledge discovery, production, and dissemination.

Wide-Ranging Goals:

- Provide services and support throughout the scholarly information life cycle, from creation to curation
- Promote the open dissemination of scholarship
- Anticipate and provide access to collections, services, tools, and expertise that support current and future research, scholarship, and creativity
- Support continued custodianship of the Libraries' unique documentary and cultural resources while encouraging their study and use in original scholarship

Library Signature Initiatives (examples):

- Partner with local, regional, state, national, and international partners in protecting sensitive data
- Support research data management at UB and across SUNY
- Lead UB and SUNY towards a campus/university-wide OA policy
- Partner with other UB units to maximize impact of UB's scholarship
- Partner with other UB units to value alternative forms of scholarship
- Lead ORCID implementation at UB

Theme #2: Educational Experience

Enriching teaching and learning endeavors across campus by providing relevant collections, research expertise, and welcoming spaces.

Wide-Ranging Goals:

- Provide teaching and training to enrich the student academic experience
- Ensure that all UB undergraduates, graduate students, and post-graduate students achieve information and digital fluency
- Design innovative research services and teaching practices to support clinics and other experiential learning opportunities
- Provide all UB students with training in the ethical use of information
- Provide all UB students with the tools to be critical consumers of information

Library Signature Initiatives (examples):

- Integrate information fluency and digital fluency into UB curriculum
- Provide instruction for graduate and post-graduate students in research fluency
- Teach courses in specialized areas of expertise (e.g., evidence-based medicine)

Theme #3: Technology & Digital Infrastructure

Creating and supporting technologies to meet research, teaching, and learning needs.

Wide-Ranging Goals:

- Support the adoption of technologies used to engage in research, teaching, and learning
- Participate in the creation of innovative technologies to support new and evolving research, curricular, and learning needs
- Design library technologies that enhance the discoverability and dissemination of information
- Support the development of long term preservation tools to facilitate continued collection, care, and access to unique documentary and cultural resources

Library Signature Initiatives (examples):

- Creation of digital repository
- Creation of digital recording studios
- Adoption of tools used in teaching communicative literacy
- Partnerships with other campus units to create open educational resource platforms
- Support for platform for open journal publishing

Theme #4: Strategic Partnerships

Building partnerships across and beyond UB to strengthen the cultural vitality of WNY and improve the economic well-being, social equality, and health of all New Yorkers.

Wide-Ranging Goals:

- Build partnerships with other cultural heritage institutions (libraries, museums, historical societies, etc.) region to strengthen the cultural vitality of WNY
- Build partnerships with organizations across New York state to improve the economic well-being, social equality, and health of all New Yorkers

Library Signature Initiatives (examples):

- Build partnerships to create collaborative digital collections
- Partner with health organizations to provide health literacy instruction to underserved populations

Theme #5: Employee Empowerment

Sharing information, authority, and resources so that all employees can take the initiative to solve problems and be accountable for actions and outcomes.

Wide-Ranging Goals:

- Build an inclusive workplace environment
- Build a workplace culture that promotes engagement, collaboration, and innovation
- Create staff development opportunities in order to build skill sets and assist staff in meeting professional development goals

Library Signature Initiatives (examples):

- Support staff to attend numerous training and development workshops offered by UB
- Support staff to attend numerous webinars offered by professional associations
- Support staff with travel and training funds
- Offer mentorship through internal and external mentorship programs
- Host civility in the workplace workshops

C. UL Vision, Mission & Values

VISION

The University Libraries will be recognized as premier academic research libraries that advance intellectual discovery by connecting people with knowledge.

MISSION

Provide outstanding resources, experts, services and spaces to enrich the research, learning, teaching and creative activities of UB faculty, students and staff as well as those of the local and global community members we serve.

VALUES

- excellent service
- collaboration, innovation and creativity
- inclusiveness and respect for the individual
- accountability for our actions and decisions
- ongoing, open communications

D. UL Balanced Scorecard Strategic Map



E. UB2020 Goals

Our guiding objective—from the inception of the UB 2020 strategic planning process in 2004, to our current efforts to build on this progress through the Realizing UB 2020 initiative—is to elevate and strengthen the academic profile of our university in order to:

- advance excellence across the research enterprise,
- provide our students with an exceptional education,
- and deepen our impact on the broader communities we serve locally and globally.

UB is committed to:

- Building on the foundation of our faculty excellence through investing in high-impact research across the disciplines,
- Enriching the overall educational experience while raising the academic profile of our undergraduate, graduate and professional students;
- Improving academic support infrastructures to create a state-of-the-art educational and research environment;
- Enhancing faculty, staff and student diversity via focused enrollment and hiring strategies that implement best practices regarding recruitment and retention;
- Strengthening our significant international presence and preparing our students to lead in a global society;
- Deepening our impact and outreach in the regional community by strengthening programs and partnerships that contribute to the social, cultural and economic vitality of Western New York; and
- Aligning our health science schools with key partners to improve health care outcomes and advance clinical research locally and globally.

Source: <https://www.buffalo.edu/ub2020/about1/goals.html>

F. Overall Librarianship Core Values

Association of Research Libraries (ARL) Basic Values:

- Open and equitable access to information is a fundamental tenet to society.
- Research libraries are active agents central to the process of the transmission and creation of knowledge.
- Research libraries have a responsibility to anticipate and prepare for the information needs of present and future users.

- Collaboration among libraries improves prospects for individual library success in fulfilling local needs.
- Focus Areas: Accessibility, Copyright & IP, E-Research, Open Scholarship, Privacy, Security & Civil Liberties, Public Access Policies, Research Collections, Scholarly Communication, Spaces, Facilities & Services, Statistics & Assessment, Workforce

American Library Association (ALA) and Society of American Archivists (SAA) Core Values:

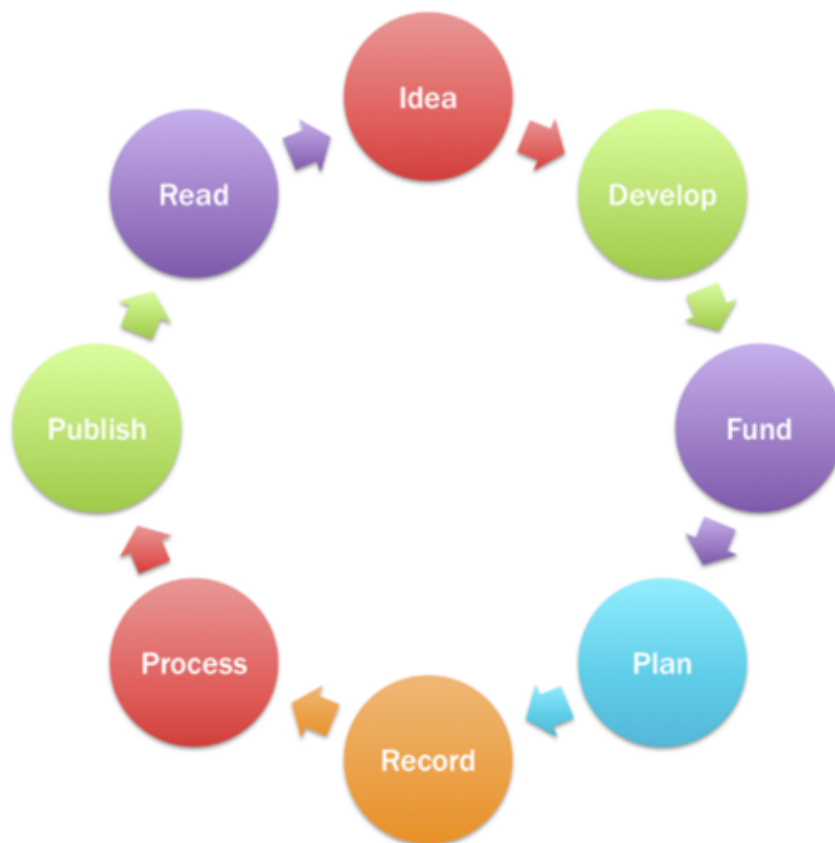
- Access and Use
- Accountability
- Advocacy
- Confidentiality/Privacy
- Democracy
- Diversity
- Education and Lifelong Learning
- History and Memory
- Intellectual Freedom
- Preservation
- The Public Good
- Professionalism
- Selection
- Service
- Social Responsibility

Scholarly Publishing and Academic Resources Coalition (SPARC):

- Open Access is the free, immediate, online availability of research articles coupled with the rights to use these articles fully in the digital environment. Open Access ensures that anyone can access and use these results—to turn ideas into industries and breakthroughs into better lives.
- Open Education encompasses resources, tools and practices that are free of legal, financial and technical barriers and can be fully used, shared and adapted in the digital environment. Open Education maximizes the power of the Internet to make education more affordable, accessible and effective.
- Open Data is research data that is freely available on the internet permitting any user to download, copy, analyze, re-process, pass to software or use for any other purpose without financial, legal, or technical barriers other than those inseparable from gaining access to the internet itself.

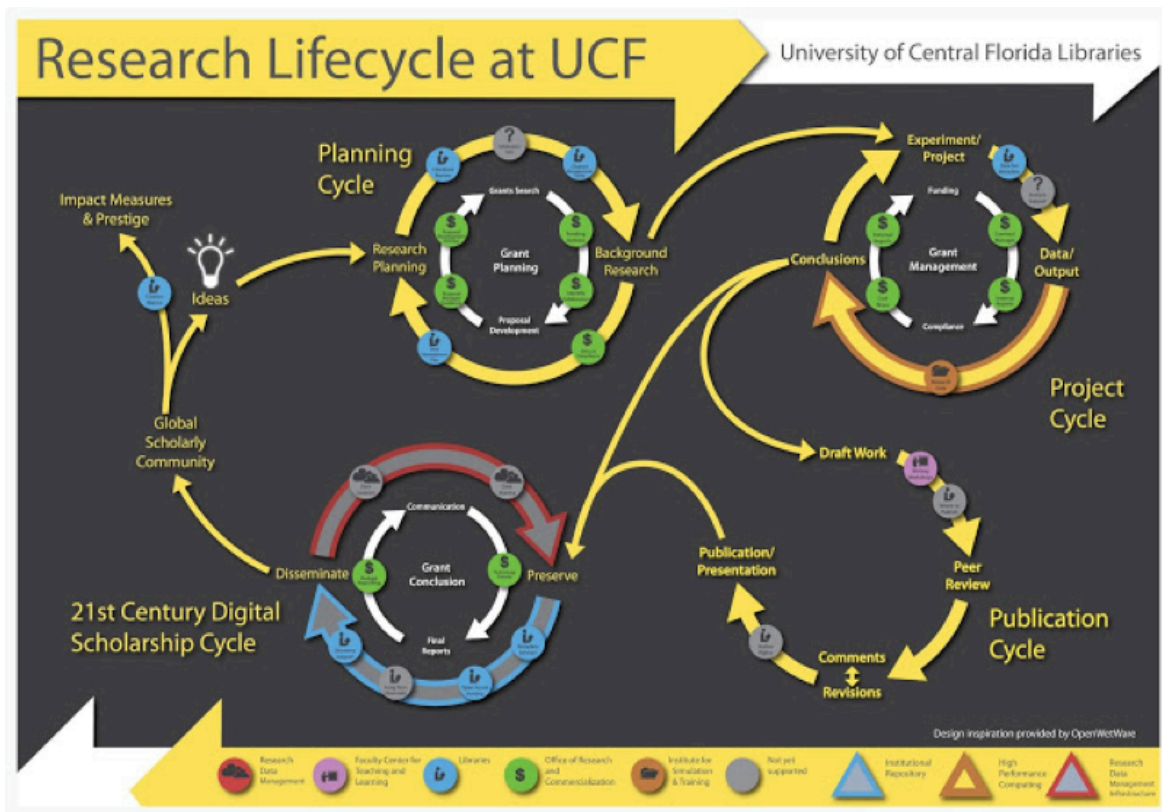
G. Selected Slides from University Libraries' Town Forums

Selected Slides from University Libraries' Town Forums held on June 7, 2017 and July 11, 2017, representing research life cycles.



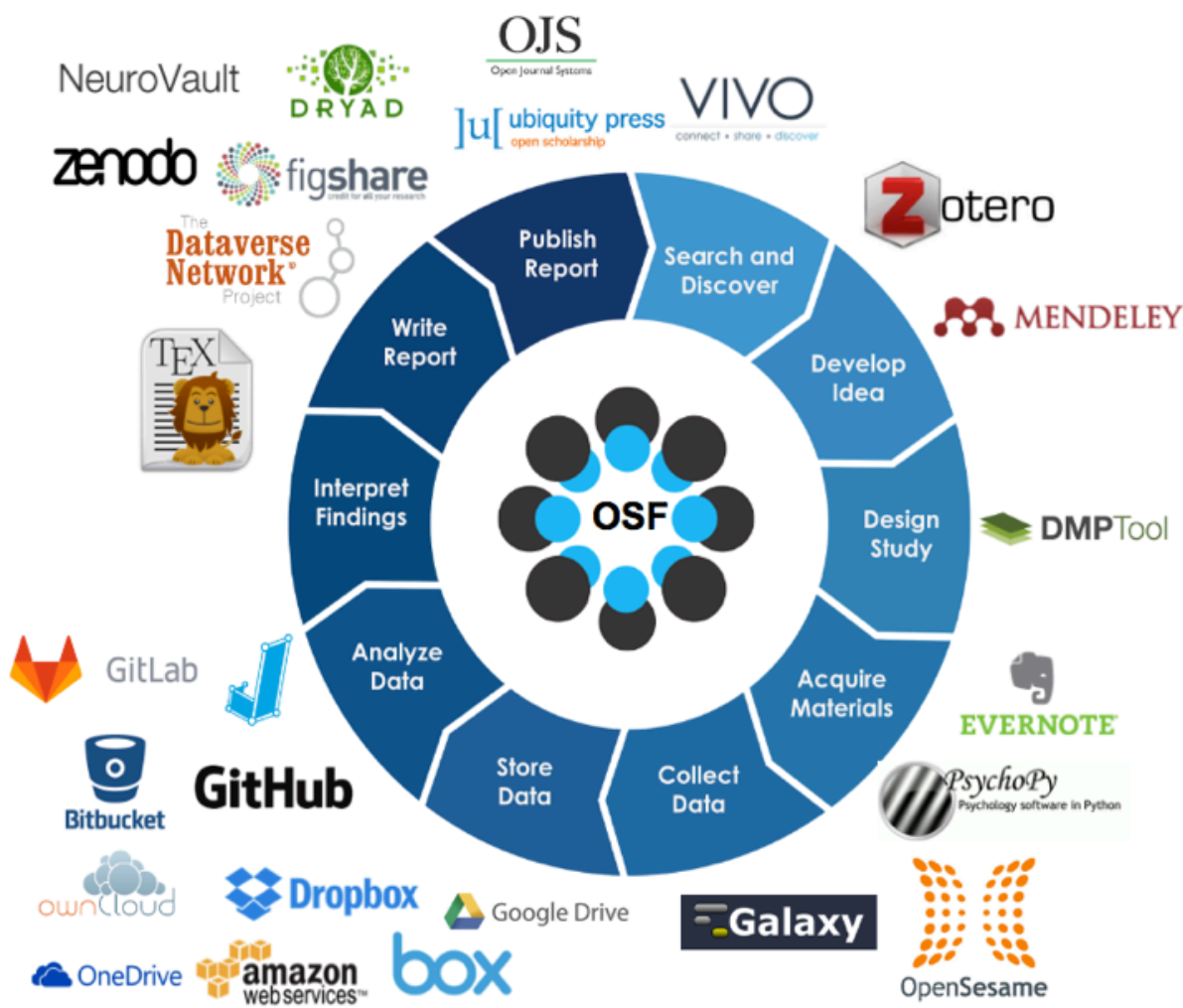
Research Life Cycle

Source: <https://www.slideshare.net/CameronNeylon/nestascience-in-society>



Research Life Cycle

Source <http://library.ucf.edu/about/departments/scholarly-communication/research-lifecycle>



Research Life Cycle

Source: <https://cos.io/our-products/open-science-framework>

101 Innovative tools and sites in 6 research workflow phases (< 2000 - 2015)



Tools to Support Research Workflow Phases

Source: <https://innoscholcomm.silk.co>

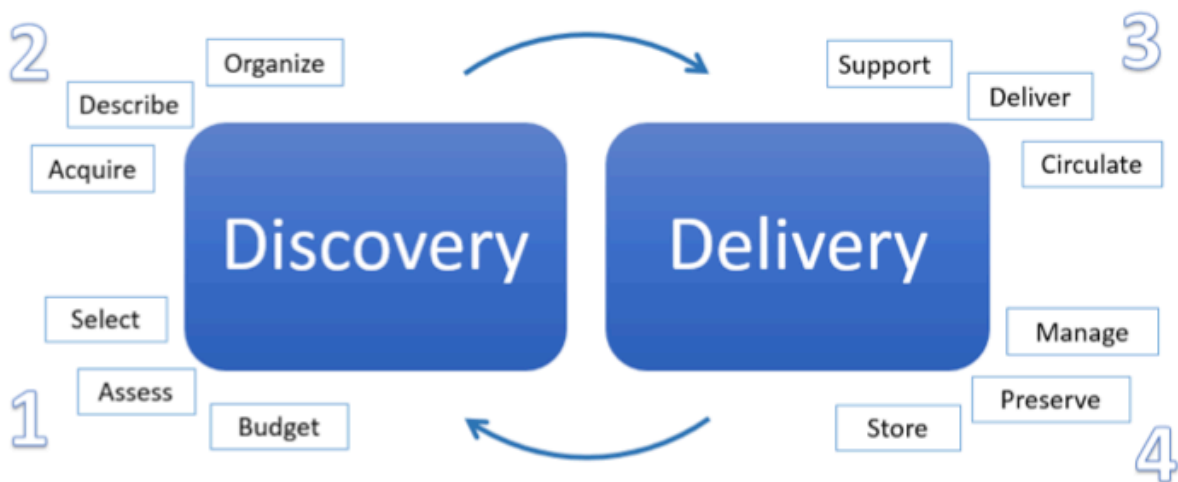


Design Thinking

Source: designthinkingforeducators.com/design-thinking

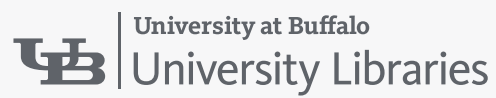


Lifecycle of Library Materials



H. Background Reading

- Futures Thinking for Academic Librarians: Higher Education in 2025
- <http://www.ala.org/acrl/sites/ala.org.acrl/files/content/issues/value/futures2025.pdf>
- Ithaka S+R US Faculty Survey 2015
- <http://www.sr.ithaka.org/publications/ithaka-sr-us-faculty-survey-2015>
- Library Collections in the Life of the User: Two Directions
- <https://www.liberquarterly.eu/articles/10.18352/lq.10170>
- New Roles for New Times: Transforming Liaison Roles in Research Libraries
- <http://www.arl.org/storage/documents/publications/nrnt-liaison-roles-revised.pdf>
- Redefining the Academic Library: Managing the Migration to Digital Information Services <https://www.eab.com/research-and-insights/academic-affairs-forum/studies/2011/redefining-the-academic-library>



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University at Buffalo Libraries

433 Capen Hall
Buffalo, NY 14260-1625
(716) 645-2965