Mission
The University Libraries inspires intellectual discovery and learning through robust information resources and academic collaborations in teaching and research that connect the Penn State community and citizens of Pennsylvania to the world of knowledge and new ideas.

Vision
We are a world-class research library organization with a global reach, providing a welcoming and inclusive environment for learning, collaboration, and knowledge creation. As leaders in delivery and preservation of library collections, we will leverage technology and reward innovation to ensure the University Libraries will be partners in research and education.

Institutional Values
INTEGRITY: We act with integrity and honesty in accordance with the highest academic, professional, and ethical standards.
RESPECT: We respect and honor the dignity of each person, embrace civil discourse, and foster a diverse and inclusive community.
RESPONSIBILITY: We act responsibly, and we are accountable for our decisions, actions, and their consequences.
DISCOVERY: We seek and create new knowledge and understanding, and foster creativity and innovation, for the benefit of our communities, society, and the environment.
EXCELLENCE: We strive for excellence in all our endeavors as individuals, an institution, and a leader in higher education.
COMMUNITY: We work together for the betterment of our University, the communities we serve, and the world.

Foundational Values
Equity of Access: The University Libraries promotes the freedom, discovery, openness, and sustained affordability of information.
Diversity and Inclusion: The University Libraries is committed to diversity in all of its forms, embracing differences with acceptance and respect.
Ethics and Integrity: The University Libraries operates on a strong foundation of ethical principles and professional integrity.
Sustainability: The University Libraries supports the simultaneous pursuit of human health, happiness, environmental quality, and economic well-being for current and future generations.
Empathy: The University Libraries has a service orientation that seeks to understand and meet the needs of others.
Organizational Excellence: The University Libraries strives for organizational excellence by providing a consistent framework for the delivery of initiatives to facilitate institutional progress. The Libraries will partner directly and effectively with constituents in outreach and engagement initiatives, will develop and deploy effective and agile organizational processes, and will think creatively and act boldly to ensure that its infrastructure supports the mission and vision of the University Libraries.
Planning Process

2020 - 2025

Planning Process
We formed a Strategic Planning Steering Committee, composed of senior administrators, faculty, staff, and
coo-chairs of teams that developed goals and objectives for each of the three programmatic areas.
The first step of the Steering Committee was to evaluate the need to change or revise the University Libraries’ mission and vision statements. Since our vision statement was actually one of the top-rated
research library vision statements (according to a peer-reviewed study), and we felt that it was still relevant
to the vision of the University, the decision was to only make minor edits to the previous vision statement.
We then conducted a University Libraries-wide survey to seek input from the entire organization on what our
employee thought were important goals and objectives. More than 270 people participated in the survey.
Based on the data, each of the programmatic area teams develop sets of questions for focus group
interviews to delve deeper into the issues. More than 80 people participated in the focus groups. With the
collected data, the programmatic area teams developed goals and objectives for each area.
Once the goals and objectives were developed, the chair of the Steering Committee appointed six action
item writing teams to develop action items under each goal/objective. More than 50 people participated in
writing the action items. One of the criteria for selecting action writing team members was their closeness
to the actual operations of the goals and objectives. The rationale was that those who will actually carry out
the actions should have a significant voice in developing those items.
After the action items were developed, the Steering Committee selected the ones to include in this strategic
plan based on University and University Libraries priorities.

Personnel and constituents included in the planning process
Steering Committee:
   Leo Lo, Chair
   Anne Behler
   Steve Borrelli
   Dan Coughlin
   Dace Freivalds
   Mihoko Hosoi
   Bonnie Imler
   Martha Ney
   Kimlyn Patishnock
   Ruth Tillman
   Nonny Schlotzhauer
   John Shank
   Michael Wright
   Fay Youngmark

A full list of all groups and action item writing teams will be included with the final version of the plan as
supporting documents.

Publicity for the plan
The plan will be on posted on the University Libraries’ website, and the staff intranet. Presentations will be
made to the entire University Libraries as well as to relevant stakeholders on campus and external to the
University, such as donors.

Plan Approved By
Leo Lo, Chair of the Steering Committee; Faye Chadwell, Dean of University Libraries and Scholarly
Communications
Supporting Evidence
Start Plan Committees_3-2021.xlsx
University Libraries Strategic Plan_4-1-2021_FINAL_track changes.docx
Goal 1
Advancing University Research: Serve as an active partner in University research

Goal
Serve as an active partner in University research and leverage the University Libraries broad involvement with the University community to foster interdisciplinarity and innovation and to distribute support broadly.

1.1: Create and implement a research services model

Objective
Create and implement a research services model that crosses organizational and unit boundaries, provides support for current and emerging researcher needs, and promotes University research by increasing its visibility and impact.

Key Performance Indicator(s)
Completed needs assessment articulating the scope and breadth of the administrative burden and needs of researchers
1: Develop Open Access policy compliance process flowchart
2: Record the number of annual Green OA deposits in ScholarSphere
3: Increased number of deposits, views, downloads, and citations for publications with ScholarSphere
4: Increase number of consultations with researchers on efforts towards scholarship, data management plans, etc.

Mapping
Penn State Foundations
• F2 - Engaging Our Students

Penn State Thematic Priorities
• TE1 - Advance The Frontiers Of Knowledge

Penn State Supporting Elements
• IS5 - Align Fundraising To Address Specific Needs

1.2: Develop and implement a multi-campus service approach to promote awareness of University Libraries’ services

Objective
Develop and implement a multi-campus service approach to promote awareness of University Libraries’ services, and their alignment with University priorities and strategic directions.

Key Performance Indicator(s)
1: Completed needs assessment identifying gaps in promotion and awareness of research support services
2: Identify the number of research services support materials distributed via Libraries Strategic Technologies hosting platform
3: Increase the number of grants, publications, workshops, presentations of librarians working collaboratively from separate campuses

Mapping
Penn State Foundations
• F2 - Engaging Our Students

Penn State Thematic Priorities
• TE - Penn State will be a leader in the transformation of education, including enhancing access to it, as it fulfills its land-grant mission in a 21st-century context and continues to drive discovery-focused research across disciplines.

**Penn State Supporting Elements**
• No Associated Supporting Element Connection

**Strategic Plan (2020 - 2025) - University Libraries**
• Advancing University Research: Serve as an active partner in University research

**1.3: Publication of Penn State Research**

**Objective**
Collaborate with colleges, academic programs and institutes, and various University Libraries publishing services (including Penn State University Press, ScholarSphere, and Open Publishing) to facilitate the publication of Penn State research and scholarship in a variety of formats.

**Key Performance Indicator(s)**
1: Annual percent change in deposits and prints to ScholarSphere and OJS by discipline

**Mapping**

**Penn State Foundations**
• F2 - Engaging Our Students

**Penn State Thematic Priorities**
• TE1 - Advance The Frontiers Of Knowledge

**Penn State Supporting Elements**
• IS4 - Build And Manage State-Of-The-Art Information Technology

**Strategic Plan (2020 - 2025) - University Libraries**
• Advancing University Research: Serve as an active partner in University research

**Goal 2**

**Advancing University Research: Diversify and Maximize Library Materials**

**Goal**
Diversify and maximize the materials we make available to the Penn State community by broadening the concept of what constitutes “collecting”, by promoting open access and new forms of scholarly communication, and highlighting distinctive collections as a core component.

**2.1:Broaden the concept of collecting**

**Objective**
Foster the use of digital repositories and data where researchers may search for the products of scholarship as well as contribute their own work.

**Key Performance Indicator(s)**
1: Number and percent change in deposits to University Libraries repositories
2: Number and percent change of downloads from University Libraries repositories
3: Increase the number of openly accessible (OA) publications that are available, not just Penn State repositories but other OA repositories
4: Increase the annual number of data sets deposited in Penn State repositories and made publicly accessible

**Mapping**
Penn State Foundations
- F2 - Engaging Our Students

Penn State Thematic Priorities
- TE1 - Advance The Frontiers Of Knowledge

Penn State Supporting Elements
- IS - Penn State will think creatively and act boldly to ensure that its academic infrastructure aligns with and supports the University's mission and vision.

Strategic Plan (2020 - 2025) - University Libraries
- Advancing University Research: Diversify and Maximize Library Materials

2.2: Coordination of collection strengths with peer institutions and consortia

Objective
Work toward coordination of collection strengths with peer institutions and consortia to create a sustainable set of information resources.

Key Performance Indicator(s)
1: Inventory of existing collection development policies identifying collection strengths and gaps
2: Priority areas for strengthening collections identified
3: Inventory of existing cooperative collection building agreements
4: Completed audit of current Penn State OER collection and storage

Mapping
Penn State Foundations
- F2 - Engaging Our Students

Penn State Thematic Priorities
- TE1 - Advance The Frontiers Of Knowledge

Penn State Supporting Elements
- IS - Penn State will think creatively and act boldly to ensure that its academic infrastructure aligns with and supports the University's mission and vision.

Strategic Plan (2020 - 2025) - University Libraries
- Advancing University Research: Diversify and Maximize Library Materials

2.3: Expand technology infrastructure

Objective
Expand technology infrastructure to support research dissemination and re-use at home and abroad.

Key Performance Indicator(s)
1: Percent of publications from law schools integrated into Metadata Database
2: Completed ScholarSphere Development Roadmap
3: Increase annual rate of deposits to ScholarSphere
4: Increase annual number of downloads from ScholarSphere
5: Increase number of bibliographies within Open Publishing platforms
6: Increase number of journals within Open Journal System (OJS)
7: Launch repository to support additional content types for open education resources

Mapping
Penn State Foundations
- F2 - Engaging Our Students
2.4: Take reparative action to encourage equity and justice in the University Libraries’ collections and services

**Objective**

Take reparative action to encourage (create) equity and justice in the Libraries’ collections and services for supporting research and Center voices, perspectives, and needs of marginalized groups and foreground ethics of care in our collections and services supporting research. Support all researchers’ needs, particularly of people of color and people with disabilities.

**Key Performance Indicator(s)**

1. Identification of priority collection areas for reparative action
2. Annual reporting of change in the number of DEIA resources in University Library collections
3. Documentation of comprehensive mechanisms for showcasing DEIA collections

**Mapping**

**Penn State  Foundations**

- F3 - Advancing Inclusion, Equity, and Diversity

**Penn State  Thematic Priorities**

- TE - Penn State will be a leader in the transformation of education, including enhancing access to it, as it fulfills its land-grant mission in a 21st-century context and continues to drive discovery-focused research across disciplines.

**Penn State Supporting Elements**

- IS - Penn State will think creatively and act boldly to ensure that its academic infrastructure aligns with and supports the University’s mission and vision.

**Strategic Plan (2020 - 2025) - University Libraries**

- Advancing University Research: Diversify and Maximize Library Materials

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**Goal 3**

Discovery, Access and Preservation – Improve the discoverability of and access to our collections and open resources

**Goal**

The Libraries will improve the discoverability of and access to our collections and open resources to support users across the University’s many learning and research environments.

**3.1: Develop interoperable digital infrastructure**

**Objective**

Develop interoperable digital infrastructure that brings together existing systems to enable user-centered discovery and access across One Penn State: libraries, units, and campuses.
Key Performance Indicator(s)
1: Increase simultaneous user access to information resources through reduction in library material recalls by 25% and promotion of open access materials.

Mapping
Penn State Foundations
- F0 - No Foundation Connection

Penn State Thematic Priorities
- DI3 - Develop A More Robust Digital Infrastructure And Culture

Penn State Supporting Elements
- OP1 - Improve The Design, Oversight, Integration, And Effectiveness Of Organizational Processes
- CO2 - Provide Expanded Access To Penn State Resources

Objective
Evaluate and prioritize usability, accessibility, and our users’ right to the privacy of inquiry when we develop and purchase resources.

Key Performance Indicator(s)
1: Reduction by 10% in requests for assistance to accommodate accessibility issues.

Mapping
Penn State Foundations
- F3 - Advancing Inclusion, Equity, and Diversity

Penn State Thematic Priorities
- TE - Penn State will be a leader in the transformation of education, including enhancing access to it, as it fulfills its land-grant mission in a 21st-century context and continues to drive discovery-focused research across disciplines.

Penn State Supporting Elements
- OP2 - Establish Processes For Continual Institutional Assessment, Improvement, And Innovation, Including More Systematic Review Of Administrative And Academic Organizational Performance And Financial Stewardship

Objective
Design a systematized, collaborative pedagogical and outreach approach to promote awareness of content, resources, and services to Penn State students, faculty, staff, and community.

Key Performance Indicator(s)
1: Enhancing coordination of awareness efforts through University Libraries communities of practice and Public Relations and Marketing unit.

Mapping
Strategic Plan (2020 - 2025) - University Libraries

Penn State Foundations
- F2 - Engaging Our Students

Penn State Thematic Priorities
- TE2 - Foster A Curriculum That Integrates Multiple Modes Of Delivery, While Leveraging Online Capabilities And Enhanced And Emerging Digital Learning Options

Penn State Supporting Elements
- OP1 - Improve The Design, Oversight, Integration, And Effectiveness Of Organizational Processes
- CO2 - Provide Expanded Access To Penn State Resources

Strategic Plan (2020 - 2025) - University Libraries
- Discovery, Access and Preservation – Improve the discoverability of and access to our collections and open resources

Goal 4
Discovery, Access and Preservation - Collections stewardship and management

Goal
The University Libraries will responsibly steward library collections and managed content across time using sustainable practices to ensure information resources remain available for future users.

4.1: Metadata remediation and digitization

Objective
Improve access to and stewardship of our diverse collections representing historically underrepresented and marginalized groups through metadata remediation and digitization.

Key Performance Indicator(s)
1: The number of library collections identified for metadata remediation in support of enhancing access to collections of historically underrepresented and marginalized groups is reduced by 5% annually.
2: One set of demographic terms have been added and search interface changes piloted to support discovery of materials by a historically marginalized community.

Mapping
Penn State Foundations
- F3 - Advancing Inclusion, Equity, and Diversity

Penn State Thematic Priorities
- No Associated Thematic Priority Connection

Penn State Supporting Elements
- OP2 - Establish Processes For Continual Institutional Assessment, Improvement, And Innovation, Including More Systematic Review Of Administrative And Academic Organizational Performance And Financial Stewardship
- CO2 - Provide Expanded Access To Penn State Resources

Strategic Plan (2020 - 2025) - University Libraries
- Discovery, Access and Preservation - Collections stewardship and management
Strategic Plan (2020 - 2025) - University Libraries

4.2: Digital preservation and curation

Objective
Investing resources in the implementation of a program plan for digital preservation and curation of digital information managed by Penn State University Libraries.

Key Performance Indicator(s)
1: Participation in additional consortia partnerships to support shared stewardship of University Libraries’ physical and digital collections (4.2.1)
2: Formation of Digital Curation Community of Practice, which shares best practices across the University Libraries and partners with other institutions (4.2.1)

Mapping
Penn State Foundations
- F0 - No Foundation Connection

Penn State Thematic Priorities
- DI3 - Develop A More Robust Digital Infrastructure And Culture

Penn State Supporting Elements
- OP1 - Improve The Design, Oversight, Integration, And Effectiveness Of Organizational Processes
- IS4 - Build And Manage State-Of-The-Art Information Technology
- CO1 - Focus On Impact Through Partnerships
- CO2 - Provide Expanded Access To Penn State Resources

Strategic Plan (2020 - 2025) - University Libraries
- Discovery, Access and Preservation - Collections stewardship and management

4.3: Building digitization capacity

Objective
Build digitization capacity by distributing work across campuses.

Key Performance Indicator(s)
1: Two or more Commonwealth Campus Libraries are digitizing their unique materials according to standards in line with digitization work performed in Preservation, Conservation, and Digitization.

Mapping
Penn State Foundations
- F0 - No Foundation Connection

Penn State Thematic Priorities
- No Associated Thematic Priority Connection

Penn State Supporting Elements
- OP1 - Improve The Design, Oversight, Integration, And Effectiveness Of Organizational Processes
- IS2 - Invest In Resources Creatively And Systematically
- CO2 - Provide Expanded Access To Penn State Resources

Strategic Plan (2020 - 2025) - University Libraries
- Discovery, Access and Preservation - Collections stewardship and management

Goal 5
Teaching and Learning - Enhance student success by strengthening reference and instructional services to equitably reach all Penn State students

Goal
The University Libraries will intentionally work to strengthen our reference and instructional services in online and residential education, increasing our flexibility, agility, and ability to support engaged, critical, and informed learners through multiple forms of instruction to enhance student success across the University.

5.1: Integrate information literacy into the Penn State learning experience.

Objective
Work with key partners to integrate information literacy and critical thinking competencies strategically into the Penn State learning experience.

Key Performance Indicator(s)
1: Defined success of the embedded, student engagement, and entrepreneurial librarian programs across the University Libraries to enhance Penn State students’ information literacy competencies over the next five years as measured by an approved standardized assessment applied to relevant courses across the curriculum

Mapping
Penn State Foundations
- F2 - Engaging Our Students

Penn State Thematic Priorities
- TE4 - Prepare Our Students For Success In Their Careers And In Life

Penn State Supporting Elements
- No Associated Supporting Element Connection

Strategic Plan (2020 - 2025) - University Libraries
- Teaching and Learning - Enhance student success by strengthening reference and instructional services to equitably reach all Penn State students

5.2: University-wide infrastructure and support

Objective
Provide the Penn State community cohesive learning opportunities regardless of location, mode, or means of interaction by collaborating across library units to build and assess effective University-wide infrastructure for meaningful teaching, learning, and reference initiatives.

Key Performance Indicator(s)
1: Provide opportunities for practitioners to gain knowledge and expertise necessary to teach in an online setting by providing an increasing number of learning opportunities over the next five years.

Mapping
Penn State Foundations
- F2 - Engaging Our Students

Penn State Thematic Priorities
- TE3 - Support And Empower Our Outstanding Faculty And Staff

Penn State Supporting Elements
- OP1 - Improve The Design, Oversight, Integration, And Effectiveness Of Organizational Processes

Strategic Plan (2020 - 2025) - University Libraries
- Teaching and Learning - Enhance student success by strengthening reference and instructional services to equitably reach all Penn State students
Strategic Plan (2020 - 2025) - University Libraries

- Teaching and Learning - Enhance student success by strengthening reference and instructional services to equitably reach all Penn State students

5.3: Culture of diversity, equity, inclusion, and accessibility

**Objective**
Promote a culture of diversity, equity, inclusion, and accessibility (DEIA) throughout our teaching practice through strategies including onboarding, training, and sustained professional development.

**Key Performance Indicator(s)**
DEIA competency has been increased across University Libraries as measured by the Intercultural development Inventory (IDI)

**Mapping**

*Penn State Foundations*
- F3 - Advancing Inclusion, Equity, and Diversity

*Penn State Thematic Priorities*
- TE3 - Support And Empower Our Outstanding Faculty And Staff

*Penn State Supporting Elements*
- OP1 - Improve The Design, Oversight, Integration, And Effectiveness Of Organizational Processes
- IS1 - Prioritize Investment In Our People.

**Strategic Plan (2020 - 2025) - University Libraries**
- Teaching and Learning - Enhance student success by strengthening reference and instructional services to equitably reach all Penn State students

**Goal 6**
Teaching and Learning - create impactful, engaging, inclusive, and safe learning environments

**Goal**
The Libraries will strengthen our efforts to create impactful, engaging, inclusive, and safe learning environments, both physical and virtual, that support and facilitate all learners across all disciplines, academic levels, and experiences.

6.1: Meaningful learning experience

**Objective**
Work to deliver instruction and reference in such a way that it contributes to a meaningful learning experience, via the mode that is best suited to the need, through collaboration with strategic university partners.

**Key Performance Indicator(s)**
1: Define and describe organizational priorities, expectations, and offerings of reference and instructional services across all modes and locations by 2025
2: Reference and instruction user feedback, evaluations, and assessments will be updated to reflect all modes of engagement
3: Creation of an enumerated list of OER and open pedagogy initiatives that includes goals, outcomes, and required personnel and resources, in collaboration with Open and Affordable Educational Resources (OAER) Working Group by 2022

**Mapping**

*Penn State Foundations*
Strategic Plan (2020 - 2025) - University Libraries

- F2 - Engaging Our Students

Penn State Thematic Priorities
- TE2 - Foster A Curriculum That Integrates Multiple Modes Of Delivery, While Leveraging Online Capabilities And Enhanced And Emerging Digital Learning Options

Penn State Supporting Elements
- OP1 - Improve The Design, Oversight, Integration, And Effectiveness Of Organizational Processes
- IS1 - Prioritize Investment In Our People.

Strategic Plan (2020 - 2025) - University Libraries
- Teaching and Learning - create impactful, engaging, inclusive, and safe learning environments

6.2: Emerging and impactful educational technologies

Objective
Explore emerging and impactful educational technologies that align with University Libraries instruction goals to enhance student learning across Penn State.

Key Performance Indicator(s)
Learning objects and databases are inventoried and mapped to the University Libraries programmatic learning outcomes ensuring alignment with programmatic instruction goals.

Mapping
Penn State Foundations
- F2 - Engaging Our Students

Penn State Thematic Priorities
- TE2 - Foster A Curriculum That Integrates Multiple Modes Of Delivery, While Leveraging Online Capabilities And Enhanced And Emerging Digital Learning Options

Penn State Supporting Elements
- OP2 - Establish Processes For Continual Institutional Assessment, Improvement, And Innovation, Including More Systematic Review Of Administrative And Academic Organizational Performance And Financial Stewardship

6.3: Enhance physical and virtual spaces

Objective
Enhance physical and virtual spaces across the University Libraries to meet curricular instructional and research needs.

Key Performance Indicator(s)
Determine and demonstrate the level of success and user satisfaction with the space and technology upgrades by using the EDUCAUSE Learning Space Rating System for 20% per year of instructional and learning spaces across all locations of University Libraries.

Mapping
Penn State Foundations
- F2 - Engaging Our Students

Penn State Thematic Priorities
- TE2 - Foster A Curriculum That Integrates Multiple Modes Of Delivery, While Leveraging Online Capabilities And Enhanced And Emerging Digital Learning Options
Strategic Plan (2020 - 2025) - University Libraries

Penn State Supporting Elements

- OP1 - Improve The Design, Oversight, Integration, And Effectiveness Of Organizational Processes
- IS3 - Drive Innovation And Discovery

Goal 7

Support organizational excellence with a focus on diversity, equity, inclusion and accessibility.

Goal
Create an organization to support diversity, equity, inclusion, accessibility.
Actively seek to identify and resolve barriers within the University Libraries to support the advancement and sustainability of diversity, equity, inclusion and accessibility.

7.1: Establish and strengthen an organizational culture of DEIA.

Objective
Enhance and integrate DEIA into the operations, assessment, and organizational structure of the University Libraries.

Key Performance Indicator(s)
1: Increased/consistent participation in DEIA trainings offered — the extent to which DEIA initiatives are incorporated into unit-level planning
2: Determination of a senior leadership position or role that coordinates University Libraries DEIA efforts
3: DEIA programming and training assessments that indicate consistent participation and impact

Mapping
Penn State Foundations
- F3 - Advancing Inclusion, Equity, and Diversity

Penn State Thematic Priorities
- No Associated Thematic Priority Connection

Penn State Supporting Elements
- OP1 - Improve The Design, Oversight, Integration, And Effectiveness Of Organizational Processes
- IS1 - Prioritize Investment In Our People.

Strategic Plan (2020 - 2025) - University Libraries
- Support organizational excellence with a focus on diversity, equity, inclusion and accessibility.

7.2: Recruitment and Retention

Objective
Recruit more people from minoritized and historically underrepresented groups for standing positions. Prioritize retention and advancement of minoritized and historically underrepresented library personnel, especially in leadership, management, and professional position.

Key Performance Indicator(s)
Annual percent increases in the number of University Libraries standing positions held by members of minoritized and historically underrepresented groups in each year of the plan

Mapping
Penn State Foundations
Strategic Plan (2020 - 2025) - University Libraries

- F1 - Enabling Access To Education

**Penn State Thematic Priorities**
- No Associated Thematic Priority Connection

**Penn State Supporting Elements**
- OP1 - Improve The Design, Oversight, Integration, And Effectiveness Of Organizational Processes
- IS1 - Prioritize Investment In Our People.

**Strategic Plan (2020 - 2025) - University Libraries**
- Support organizational excellence with a focus on diversity, equity, inclusion and accessibility.