

Conducting an Environmental Scan of Scholarly Communication Programs at The Ohio State University Libraries

Johanna Meetz

Publishing and Repository Services Librarian

The Ohio State University Libraries

<https://orcid.org/0000-0002-6647-7325>

Abstract

This article discusses the process of conducting an environmental scan after a reorganization of the Publishing and Repository Services Unit at Ohio State University Libraries. The scan focused on the institutional repository and publishing programs and was intended to give colleagues post-reorganization context and information about our work. The methods used, including stakeholder interviews of library and university staff and a review of peer institution websites, are examined. The conclusions and recommendations from the document as well as the lessons learned are also detailed. Lastly, the role the scan has continued to play in strategic planning as well as its long-term value is discussed.

Keywords: environmental scan, institutional repository, library publishing, reorganization

Johanna Meetz is the Publishing and Repository Services Librarian at Ohio State University Libraries. She oversees the institutional repository and publishing programs, and her research interests include labor, sustainability, and scalability in library publishing.

Introduction

In this article, I will discuss the process of writing an environmental scan as part of the onboarding process after my unit at Ohio State University Libraries, Publishing and Repository Services (PRS), was reorganized. The scan included a discussion of the history of PRS; our values, mission, and services; interviews with stakeholders; and information about our peer institutions who are doing similar work. While the final document was originally intended to inform colleagues in PRS' new unit as well as my new supervisor about our work and its context, it has also been helpful to PRS itself as a strategic planning and assessment tool. Though environmental scans are not uncommon and there is discussion in the literature about scans involving scholarly communication work, I had not written one previously. Furthermore, articles in the literature did not speak directly to the purpose of the scan I was asked to write as a result of our reorganization and also did not generally cover both institutional repository and publishing programs, which are the two focus areas of PRS. As a result, it is my hope that sharing how I organized the document, made decisions about the scope and methods, and am continuing to use the scan as a strategic planning document in the context of our reorganization and scholarly communication work will be helpful to others.

Literature Review

An environmental scan is defined as "the processes of utilizing a survey instrument to obtain input from an organization's leadership and occupant's leadership to evaluate both current services as well as provide insight into possible future expectations" (Chrusciel, 2011, p. 9). Environmental scans are a norm in strategic planning processes in the corporate world as well as in libraries and involve recognizing the current climate as well as future issues that will have an impact on an organization (Birdsall & Hensley, 1994, p. 150). They may involve a number of methods depending on the purpose of the scan as well as the situation of the organization. Typical options include interviews and surveys or a review of existing studies or datasets (Simons, et al., 2013; Duffus, et al., 2020). For instance, once every two years, the Association of College and Research Libraries (ACRL)'s Research Planning and Review Committee conducts an environmental scan and releases a report that discusses current themes in higher education and their potential impact on academic libraries (ACRL Research Planning and Review Committee, 2023). Outside of this report, librarians have a long history of using environmental scans in their strategic planning efforts (Beck, 2010; Simons, et al., 2013; Smith, 2015). More recently, some common themes of environmental scans in libraries include diversity, equity, and inclusion

(Duffus, 2020; Fernández & Williams, 2020; Leong, 2023) and data services (Coates, et al., 2018; Wu, et al., 2019; Senseney, et al., 2021).

In the context of scholarly communication, case studies of environmental scans have been detailed in the literature. Many of these describe the process of scholarly communication librarians collaborating with liaison or subject librarians (Malenfant, 2015; Brantley, et al., 2015; Lange & Hanson, 2020; Norris, et al., 2020). They also discuss open educational resources (Frith, 2009; Kazakoff-Lane, 2014) and the organization of scholarly communication units in the United Kingdom (Fruin, 2017). Most of these scans have a narrower focus, concentrating on one service area or idea. In addition, as others have noted, there is a general lack of articles that discuss research support, making environmental scans in this area all the more necessary (Coates, et al., 2018).

Description of Service

Context of Environmental Scan

Reorganization of PRS

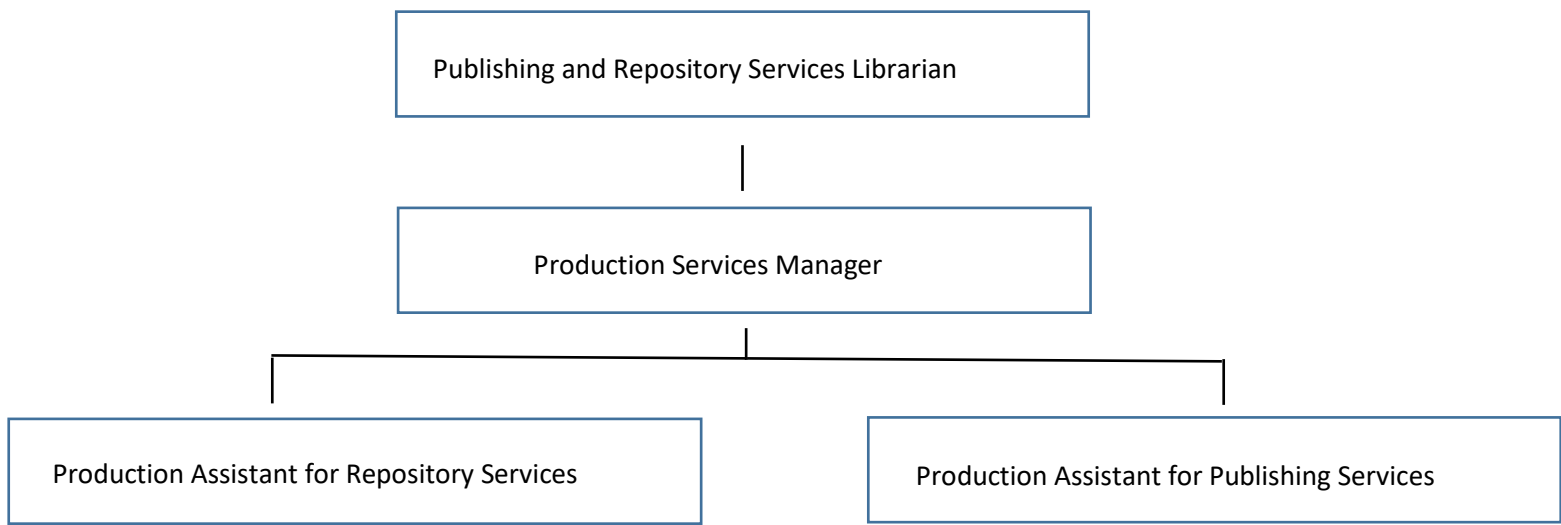
In 2022, my unit, Publishing and Repository Services (PRS), which oversees the institutional repository and publishing program at Ohio State Libraries, had recently been reorganized into Research Services. Previously, PRS was located within the Content and Access Division of the Libraries, which houses Copyright Services, Collections, Library Services for the main library, Preservation and Digitization, Bibliographic Initiatives, Acquisitions, Archival Technical Services, Electronic Resources, and Metadata Initiatives. Research Services, our new unit, is part of the Research and Education Division, which includes the Veterinary Medicine and Science Group, Fine Arts Group, Humanities and Social Sciences Group, Teaching and Learning, and Library Services for a branch library. PRS was reorganized because our work aligns closely with that of Research Services, which is made up librarians that oversee various services, including digital humanities, geographic information systems (GIS), research data, research impact, and data literacy and visualization. Though Ohio State is a large institution, University Libraries is a lean organization compared to peer institutions of similar size. This is reflected in Research Services, where the majority of the librarians who specialize in an area are the only faculty or staff supporting their work. For example, there is one Digital Humanities Librarian, one Research Data Librarian, and one Research Impact Librarian. All of our areas of expertise are related on a high level, and we generally come together to collaborate naturally when projects require additional support. For instance, if a faculty member is ending their digital humanities project, the Digital Humanities Librarian might approach me to help archive

any materials we can in our institutional repository. Many faculty in Research Services also work in partnership with the Research Commons staff who oversee programming to plan, market, and organize events related to their fields.

PRS itself is composed of my position, Publishing and Repository Services Librarian, Production Services Manager, Production Assistant for Publishing Services, and Production Assistant for Repository Services. More specifically, we are organized as illustrated in Figure 1:

Figure 1

PRS Org Chart



After joining our new unit, the Head of Research Services requested that I conduct and write an environmental scan. This is something she asks all new faculty joining Research Services to create. While individuals may customize it according to the specifics of their areas of expertise, it generally needs to include the history of the unit, mission and values, services offered, technical information (software needed), interviews with stakeholders, information gleaned from peer institutions, and recommendations. The overall goals were to discover and share the history of PRS with Research Services, communicate the context of our work, discover how our work relates to that done at our peer institutions, gather information about campus needs, make recommendations, and determine future directions.

Organization and Methods

The first step I took to begin work on the scan was to create a very brief, rough outline. PRS is one unit, but we have two distinct service areas within it that both needed to be discussed: the institutional repository and publishing program. While there is some overlap in terms of practical work across these areas, like supplementary files for the journals we publish being hosted in our institutional repository as well as shared values, like the importance of open access, they are distinct enough from each other in their workflows and needs that I separated them within the scan. However, since we are a singular unit, there was also shared work that needed to be addressed, like project management practices and documentation. Lastly, I knew that I would need to devote sections to an executive summary, background information, our peer institutions, and recommendations for future work. So, at this phase, I imagined the structure would look like:

- **Executive Summary**
- **Background**
 - History
 - Mission/Values
 - Services offered
- **Institutional Repository**
- **Publishing Program**
- **Peer Institutions**
- **Recommendations**
 - Institutional Repository
 - Publishing Program
 - Unit as a Whole
- **Conclusion**

The second step was to identify the stakeholders I would include based on the goals. I knew that I needed to gather information from people both in and outside of the libraries at Ohio State as well as from peer institutions related to institutional repositories and our publishing program. For the discussion of our institutional repository, I decided to conduct interviews with faculty and staff in the Libraries. In particular, I chose the Assistant University Archivist, the Curator of Modern Literature & Manuscripts in the Rare Books & Manuscripts Library, the Digital Preservation Librarian, the Acquisitions and Discovery Strategist, and the Metadata Initiatives Librarian. These people were selected because they regularly collaborate with PRS to include materials in our institutional repository or work on the Libraries' Digital

Collections Repository. Outside of the Libraries, I spoke with the Program Director of the Office of Service-Learning, who works with PRS to coordinate the deposit of undergraduate theses in our institutional repository.¹ I wanted to conduct interviews as opposed to using another method, like sending out a survey of close-ended questions, because I was open to letting the conversation flow however might make sense in the moment. That being said, I was flexible about the format that the interviews might take. Some preferred to talk via a Zoom meeting, while others preferred to answer the questions I sent via email. Regardless, each stakeholder was asked a different set of questions that made sense depending on how we work together.²

In the context of the publishing program, I used data gathered from an assessment conducted the previous year that included interviews with four teams of journal editors, the English Librarian, the Education Librarian, the Art and Design Librarian, the IT Department, and the Copyright Services Unit. The subject librarians were included because I wanted to learn what worked best for them in terms of sharing information about our services. Our IT Department and Copyright Services staff were involved because we collaborate with them regularly to manage the software we use and to address issues surrounding copyright. Obviously, some of the stakeholders interviewed also work with PRS in the context of both our institutional repository and publishing work, and, as a result, their answers are at least partially applicable to PRS as a whole. These interviews were all conducted via Zoom, and also had different questions for each category depending on how they work with us.

In order to find and present information about our peer institutions, I decided to review the websites of all universities that are members of the Big Ten Academic Alliance and reach out via email to staff if I had additional questions or could not find the necessary information on their sites. These institutions were chosen because, when comparisons need to be made by the Libraries at Ohio State, this is generally the group that is included. This approach, like any such exercise, has pros and cons, namely that other Big Ten libraries are not necessarily our peers in terms of the number of staff as a whole, in terms of services offered, or in terms of available resources. They offer a point of comparison, but we must also bear in mind our unique situation and challenges.

With the aim of standardizing the approach as much as possible, I made a list of the data to gather from each institution's website about their institutional repositories and publishing programs that included:

¹ Note that Ohio State's institutional repository does not contain copies of any of its master's theses or doctoral dissertations. These are deposited into OhioLINK's consortial Electronic Thesis and Dissertation Center.

² See Appendix A for a list of all interview questions.

- Number of faculty/staff
- Faculty/staff job titles
- Services offered
 - Journal Publishing
 - Number of journals published
 - Book Publishing
 - Institutional Repository
 - Data Repository
 - Institutional Repository Accepts Data Deposits
 - Digital Scholarship Center
 - Digital Humanities Projects

Using institutional websites for this purpose has advantages and disadvantages. On one hand, it requires less planning in advance to look up information on websites and does not necessitate others giving up their time to talk with you. On the other hand, different websites do not have all of the same information, they are not guaranteed to be up to date, and it can take time and effort to find what you are looking for as each institution organizes the information it presents in their own way. Still, the combination of looking at sites and reaching out with questions as needed worked well overall.

Once I had made these choices, I began by setting up times to conduct interviews, knowing that this piece of the process would likely take time due to busy schedules. That way, while I was waiting for the scheduled interview times, I could get started by searching for information on Big Ten libraries' websites.

Results of Environmental Scan

The finished environmental scan ended up being just under 10,000 words and took a full year to complete. In addition to the explanatory text in the scan, I captured the results of each focus area of the scan (institutional repository, publishing program, and peer institutions) in bulleted lists. That way, even if people were not interested in studying the entire document, they could read just the bullet points to get a high-level overview. I have included some examples below.

Institutional Repository Conclusions

- There is a lack of clarity even among product owners of Libraries' repositories about what content should go in each repository.
- There is a lack of clarity among repository stakeholders about what content should go in each repository.

- Documentation and information about Libraries' repositories either does not exist or is scattered across multiple areas (repository websites, Libraries' wiki, etc.).
- There is a lack of a "global" viewpoint on this problem – someone who is higher in the organization who can see the scope of the Libraries' as a whole, gather input from all involved, and offer unifying guidance.

Publishing Program Conclusions

- PRS staff are perceived as communicative collaborators who provide a valuable service.
- PRS needs to continue to simplify publishing workflows wherever possible.
- PRS needs to rethink project tracking software and strategies so that they are intuitive, sustainable, and meet our needs.
- PRS could explore communicating regularly with journal editors outside of answering publishing-related questions or executing publishing workflows.

Big Ten Peer Institution Conclusions

- Ohio State is in the 28th percentile in terms of number of staff who work on institutional repository and publishing programs in the Big 10.
- Ohio State is the only institution in the Big 10 to not invite, by policy, deposits of data in its institutional repository or have a separate data repository.
- All but two institutions in the Big 10 publish journals, including Ohio State.
- About 35% of Big 10 institutions publish books and/or help with digital humanities projects, not including Ohio State (our digital humanities support is outside of PRS).
- There is not a common approach to these services – everyone is doing something a little bit different.

In addition to these conclusions, the scan also includes specific recommendations that impact the future directions of PRS. I have included some examples below.

Institutional Repository Recommendations:

- Conduct a survey to find out about campus needs
- Update the website and explore how best to share the impact of our work

Publishing Program Recommendations:

- Create an annual call for journal applications

- Create a business plan
- Revise the website and explore how best to share the impact of our work

General PRS Recommendations:

- Explore better project management options
- Decide how many student workers/hours per week are optimal
- Create shared documentation for the Libraries' repositories

Lastly, I modified the rough outline of the scan as needed, and the final version is below:

- **Executive Summary**
 - Background
 - Staffing
 - Institutional Repository and Publishing Program History
 - Outreach
 - Support
 - Reorganization
- **Institutional Repository Program**
 - Values/Mission
 - Services
 - Content
 - Technical
- **Publishing Program**
 - Values/Mission
 - Services
 - Journal Statistics
 - Technical
- **Interviews**
 - Institutional Repository Conclusions
 - Publishing Program Conclusions
- **Big Ten Data**
 - Staffing
 - Services
 - Conclusions
- **Recommendations**
 - Institutional Repository Future Directions
 - Publishing Program Future Directions
- **Additional Considerations**

- **Publishing and Repository Services as a Whole**
 - General PRS Future Directions
- **Collaborative Work Opportunities**
- **Conclusion**
- **References**
- **Appendix 1:**
 - Full Institutional Repository interviews
- **Appendix 2:**
 - Full Publishing Program Interviews

Lessons Learned

When I started working on this scan, I made two assumptions: it would not take a terribly long time, and its use case would be for my new colleagues and supervisor in Research Services to learn more about our work. Both of these turned out to be false. While I completed it within the assigned deadline, the scan itself took much more time and effort than I had originally thought. In particular, finding all of the information on websites of our peer institutions was more time-consuming than I expected. It also took longer to write up all of my conclusions and to think through the recommendations than I had imagined. Furthermore, reviewing the scan with my supervisor was particularly helpful to both of us because, based on the questions she asked, I learned which areas of our work were less evident to her. This has helped me to communicate more clearly and provide additional details about these areas when I share both our ongoing work as well as our needs with her.

In addition, though the scan was certainly useful for my colleagues in Research Services and for my new supervisor, it has continued to be valuable to me since it was completed as an assessment tool. In particular, searching for information about the history of our unit, which stretches back more than 20 years and long pre-dates my employment at Ohio State, helped give me additional knowledge and context for our work. In general, the process of writing the scan taught me more about what our stakeholders value, the work our peers are doing, and helped me codify my own thoughts about our future directions. It can be easy for me to get caught up in the everyday work of our unit and put off thinking about the bigger picture, and the fact that this process has been beneficial has helped me see the value in prioritizing strategic planning for PRS. That being said, in order for the scan to be valuable in the long run, I need to prioritize revisiting its themes and continuing to think strategically moving forward.

Next Steps

Successes

It has been about a year and a half since the scan was completed, and I am pleased to report that we have made progress on many of its recommendations. For example, PRS has decided to begin managing projects using the Planner application within Microsoft Teams. This meets our needs better than the software that was used previously, and we are currently piloting its use before creating documentation. This will be used to teach new staff the norms for its use and to remind longer-term staff of our best practices. Most importantly, it will allow all of PRS to easily visualize what work is ongoing, what is upcoming, and what we are waiting on from other people outside of PRS.

In addition, PRS has settled on having one student worker who works 10 hours a week. We have also explored working collaboratively with the students who staff the front desk in the public area of the library on campus where we are located. These students report to the manager of a different area within Research Services and have the capacity to work on some PRS projects during slow times. We assign these students work that has no particular deadline or urgency because the time that they can spend on it varies. It also works best if these projects are simple because these students often work late into the evening, past the hours that PRS staff or their manager work, so there is often no one available to answer their questions immediately. So, while it is helpful to have this additional support, these students cannot replace a dedicated PRS student worker, who is able to take on more complex work or projects with deadlines.

Though it did not appear in the final list of recommendations, I wanted to include that I also created a webpage that describes the recommended procedures for submitting data to our institutional repository. This matches the current convention of the website, which has pages with recommended procedures for submitting text. I also changed the policy to allow .zip files to be deposited so that more datasets with multiple files might be included and easily downloaded by users.

Lastly, I have now written a business plan for our publishing program, which is based on an article by McCready and Molls (2018). It states our values, services, publication formats, platforms used, software used, ongoing costs, staffing, financials, and measures of success. This is a living document that will be modified as our publishing program evolves. It will also help introduce new staff to the fundamentals of our work and serve as a reminder of how our day-to-day work operates in the context of our values.

Challenges

While progress has been made in some areas, others have been more difficult. One example is creating shared documentation for our repositories that will help users understand where different materials belong. All of the people involved agree that this would be helpful, and we have been able to meet a few times. However, due to the many demands on their time, these meetings have not resulted in sharable documentation. I am hopeful that we may be able to make progress at some point in the future. In the meantime, I am thinking about information I might add to our website or to other external documentation about the materials that are the best fit for our institutional repository.

I had also planned to begin revising our institutional repository and publishing program websites in the latter half of 2024 but have decided to put this on hold because our Marketing and Communications Unit has announced that the entire website will be refreshed soon. In addition, the time that would have gone into website revision will be needed to work on a different project that has come up. Though there has been a delay, revising the website is still a priority, and I hope to be able to complete this in 2025.

Lastly, while creating an annual call for journal proposals is still something I'd like to implement, I am hesitant to recruit new journals at this time. Like all library publishing programs, and libraries in general, PRS is greatly impacted by the new rule on the accessibility of web content (U.S. Department of Justice Civil Rights Division, 2024). While we have been making iterative changes to ensure our compliance, as of this summer, all content we publish meets Web Content Accessibility Guidelines (WCAG) 2.1 Level AA. At this time, PRS is still learning how much time these extra steps add to all of our workflows, and I am hesitant to add additional journals until this is clear. If someone found our application for new journals, which is still posted online, I would be happy to talk about their project and potentially add their journal. However, until the workflows that ensure we are meeting accessibility standards are routine for our staff, and we have a good understanding of the time commitment they will take, we will wait to implement an official call for proposals.

Impact

Overall, writing this scan has facilitated new collaboration (like with the faculty who administer and work on the Digital Collections repository), deepened other relationships (like with Copyright Services and IT), and given us greater understanding of the organization and practices of our fellow Big Ten institutions. It also helped introduce PRS and its services to Research Services. Furthermore, the previously

completed publishing program assessment, environmental scan, and newly complete publishing program business plan are coming together to provide a springboard as I work toward formalizing a routine assessment effort for both our institutional repository and publishing programs.

Writing this scan has also had an impact on my own development as a leader. Writing this document was one of the first opportunities I had to pause, connect with others, gain greater awareness of Ohio State's peer institutions organization and practices, and determine how I want to continue to think strategically about PRS. While more nitty-gritty tasks like optimizing PRS' workflows are certainly important parts of my job, equally essential is defining success, assessing our work, and sharing its impact with others. As my colleague in Research Services, Leigh Bonds, noted in the article she authored that explores writing her environmental scan, "Rather than the culmination, the report was, in fact, the beginning [of a] process that will continue both formally and informally" (Bonds, 2018). The environmental scan, plus the other documents I have developed since the scan was written, inform how I am defining success for PRS as well as how I am planning to share the impact of our work both internally with colleagues and externally with our stakeholders.

Conclusion

Conducting this environmental scan reinforced the fact that there is no one way to do scholarly communication work or define success. Each institution is organized differently, has different numbers and kinds of staff, and offers different services. That being said, we are united in our missions, and, particularly in the context of institutional repositories and library publishing, in the value of open access. Though the way your institution conducts scholarly communication work is likely not the same as Ohio State Libraries' methods, it is my hope that this discussion can serve as an example of how you might approach and conduct your own environmental scan, the kinds of conclusions and recommendations you could make, and what you might learn, as well as how to communicate the continued impact and worth of this kind of work. Whether you are offering a new service or have 20 years of history, pausing to gather information, reflect, and think about the future is always worthwhile.

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Appendix 1: Interview Questions for Institutional Repository

Assistant University Archivist

1. What has been particularly helpful/useful about the institutional repository for your collections? Are there any pain points?
2. How are you deciding what materials go in the institutional repository vs. the Digital Collections (DC) platform?
3. Is there anything that would be helpful to you that we're not doing?
 - a. Suggestions: Flow chart for understanding what goes in institutional repository and what goes in DC, additional documentation on metadata standards, clearer policies, different information on website, greater understanding of institutional repository's mission/vision, greater understanding of institutional repository's values, etc.

Acquisitions and Discovery Strategist and Metadata Initiatives Librarian

1. How do you get approached about DC projects?
2. How do you determine if the DC is a good fit?
3. Does the DC have mission/vision/policies that could be shared?
4. Can you walk me through a submission process that a curator might go through?
5. What instructions/documentation does DC have for users?
6. Would a streaming server be helpful to you?
7. Would a flowchart about how to decide what "fits best" in the DC vs. the institutional repository be something that would be helpful to you/your stakeholders? What potential obstacles do you see in the creation of this kind of documentation?

Curator of Modern Literature and Manuscripts

1. What has been particularly helpful/useful about the institutional repository for your collections? Are there any pain points?
2. How are you deciding what materials go in the institutional repository vs. the DC?
3. Is there anything that would be helpful to you that we're not doing?
 - a. Suggestions: Flow chart for understanding what goes in institutional repository and what goes in DC, additional documentation on metadata standards, clearer policies, different information on website, greater understanding of institutional repository's mission/vision, greater understanding of institutional repository's values, etc.

Digital Preservation Librarian

1. How do you see the institutional repository fitting into the landscape of the libraries' current repositories in general? What about in the context of the preservation repositories specifically?

Appendix 2: Interview Questions for Publishing Program

Copyright Services

1. How have you collaborated with PRS' publishing program in the past?
2. What is working well for you in our collaborations?
3. What are the pain points for you in our collaborations?
4. Is there anything we can do differently in our communication to better serve us working together?

IT Department

1. How have you collaborated with PRS' publishing program in the past?
2. What is working well for you in our collaborations?
3. What are the pain points for you in our collaborations?
 - a. Follow-up: Anything specifically to do with publishing platforms (institutional repository, OJS)?
4. Is there anything we can do differently in our communication to better serve us working together?

English, Education, and Art and Design Librarians

1. How have you worked with the publishing program previously?
2. How have things been communicated to you from PRS in the past? Is that still working?
3. In general, how can I give you information you can present to your constituents – email, News Notes, another preference?
4. What format can information about PRS publishing services take that would be easiest for you to share with your constituents?
 - a. LibGuide?
 - b. "Handout" you could email to faculty?
 - c. Something else?

Journal Editors

1. Can you tell me about your history of working with the Libraries' publishing program?
2. How did you learn about the Libraries' publishing program?
3. How do you feel our services align with your goals for the journal?
4. For journals that publish in 2 formats: What is your preferred format for publication? What do you feel publishing in 2 formats adds to the journal? What do you feel publishing in 2 formats adds to the reader's experience?

5. When training, do you prefer a live/scheduled meeting with PRS staff? Or would you prefer on-demand instruction that you could access on your own any time? Would you prefer videos or text/screenshot instructions?
6. How do you use the editor's packet we provide to you?
 - a. Potential follow-up questions: Is this something you continue to refer to as time passes, or was it mainly used when you were first starting out? Is there a format or way this information could be presented to serve your needs better?
7. What are your thoughts about rolling publication?
 - a. Potential follow-up questions: Are you interested in publishing on a rolling basis? Or would you be interested in discussing a rolling publication workflow?
8. What impact has our publishing program had on the journal?

Appendix 3: Information Gathered from Peer Institution Websites

- Number of staff
- Job titles of all staff
- Services offered
- Journal publishing
 - Number of journals published
- Book publishing
- Institutional repository
- Data repository
 - Institutional repository accepts data deposits
- Digital scholarship center
- Digital humanities projects

