



# Open Scholarship Initiative

## Community Playbook

Simon Fraser University

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## 1 Introduction & Overview

### 1.1 Purpose of the Playbook

Describe the overarching purpose of this document and its role in guiding the Open Scholarship Initiative (OSI) at Simon Fraser University.

### 1.2 Scope

Define what this playbook covers — the community, initiative boundaries, and key stakeholder groups.

### 1.3 Relationship to SFU's Open Scholarship Framework

Refer to institutional frameworks and strategies outlined at [SFU Open Science & Scholarship Framework](#).

### 1.4 How to Use this Playbook

Outline the intended audience (faculty, staff, students, collaborators) and guidance on navigation and updates.

### 1.5 Versioning and Maintenance

Describe update frequency, contributors, and where the playbook is hosted (e.g., GitHub, SFU wiki).

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## 2 Project Vision

### 2.1 Vision Statement

**Goal:** Articulate what the SFU OSI aims to achieve in advancing open, equitable, and reproducible research practices.

## 2.2 Mission and Guiding Principles

List principles such as transparency, collaboration, inclusivity, and knowledge sharing.

## 2.3 Strategic Alignment

Explain alignment with SFU's Strategic Research Plan and performance excellence objectives.

## 2.4 Core Values

Equity • Transparency • Interdisciplinarity • Community Impact • Sustainability

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# 3 Problem Statements

## 3.1 Context

Summarize the current landscape of open scholarship at SFU.

## 3.2 Key Challenges and Barriers

- Awareness and training gaps
- Infrastructure and data management challenges
- Recognition and incentives for open practices

## 3.3 Why These Problems Matter

Explain implications for researchers, the institution, and the broader scholarly ecosystem.

## 3.4 Target Populations

Identify core participant groups (faculty, students, librarians, staff, external collaborators).

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## 4 Specific Aims

Use **SMART** (Specific, Measurable, Achievable, Relevant, Time-bound) objectives.

## 5 History of Open Scholarship at SFU

Historical context where the SFU OSI fits in.

## 6 Strategy, Programming, Policies & Processes

### 6.1 Vision & Mission

- **Vision:** Embed open scholarship practices across SFU, aligning with institutional frameworks for open science and open scholarship.
- **Mission:** Build a vibrant community of practice supporting researchers with tools, training, incentives, and culture change.
- **Principles:** Transparency, accessibility, reuse, and equity — consistent with [SFU's Open Science principles](#).

### 6.2 Strategic Goals

- Increase adoption of open access publishing, open data, open educational resources, and open methods.
- Build capacity through training, mentorship, and community collaboration.
- Integrate open scholarship throughout the research lifecycle.
- Evaluate and communicate impact through open reporting mechanisms.

### 6.3 Programming

- **Training:** Workshops on open data, reproducibility, and licensing.
- **Community of Practice:** Monthly meetings and special interest groups.
- **Champion Program:** Faculty and student advocates for open scholarship.

- **Resources:** Online repository of toolkits and templates.
- **Consultations:** Support for researchers implementing open practices.
- **Events:** Hackathons, seminars, “Open Scholarship Week,” annual showcase.

#### 6.4 Policies & Processes

- Reference SFU’s Open Scholarship and Open Access Policies.
  - Define clear onboarding/offboarding for members and leaders.
  - Workflow for proposal submission, review, and approval of new initiatives.
  - Conflict resolution and escalation linked to the Code of Conduct.
  - Budget allocation and funding process transparency.
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### 7 Outputs, Metrics & Evaluation

#### 7.1 Key Outputs

- List main outputs, activities and resources to be created or curated

#### 7.2 Metrics & KPIs

- List main metrics of success

#### 7.3 Evaluation

- Mixed-method approach: metrics + qualitative data.
  - Publish annual dashboard and impact report.
  - Continuous improvement loop informed by feedback.
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## 8 Governance Model

### 8.1 Structure

- **Implementation Committee:** Strategic guidance and alignment.
- **Community Committees:**
  - Code of Conduct Committee
  - Programming & Implementation Committee
  - Communications & Outreach Committee
  - Metrics & Evaluation Committee
- **Working Groups:** Thematic or ad-hoc groups for specific initiatives.

### 8.2 Roles & Responsibilities

- Initiative Director, Community Manager, Training Lead, Data Lead, Communications Officer, Faculty/Staff Champions, Student Ambassadors.

### 8.3 Collaborators & Members

- Internal (faculty, staff, students, librarians).
- External (partner institutions, funders, networks).

### 8.4 Communication Channels

- Discord (?), mailing list, newsletter, public website, webinars.
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## 9 Collaborative Tools, Meetings & Events

### 9.1 Tools

- Tools for communication

- Tools for project management
- GitHub for documentation
- Zoom for online events
- Quarto pub for dashboards
- SFU's repository for open data and publications

## 9.2 Meetings

Examples: - Monthly community call

- Quarterly all-hands review
- Biweekly implementation committee
- Semi-annual steering meeting
- Ad-hoc working group sessions

## 9.3 Events

Examples: - Annual Open Scholarship Showcase

- Monthly themed seminars
  - Hackathons and bootcamps
  - Representation at external conferences
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# 10 Key Deadlines, Programming, Reporting & Conferences

## 10.1 Regular Programming

Examples: - Monthly seminars, quarterly drop-ins, annual Open Scholarship Week, onboarding each term

## 10.2 Key Deadlines & Reporting

Examples: - **March 31:** Q1 Report

- **June 30:** Mid-Year Review
- **September 30:** Planning Cycle
- **December 31:** Annual Report

- **August 31:** Publish Training Calendar
- **April 30:** Call for Champions

### 10.3 Conferences & External Engagement

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## 11 References & Supporting Documents

- **Code of Conduct** – community expectations and procedures
  - **Onboarding Guide** – for new community members
  - **Offboarding Checklist** – exit process
  - **SFU Open Scholarship Principles:** [link](#)
  - **Policy Documents:** Open Access, Data Management, OER Policies
  - **Templates:** training evaluation forms, workshop guides, event planning checklist
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## 12 Appendices

- **A. Glossary of Terms**
- **B. Committee Charters**
- **C. Roles & Responsibilities Matrix**
- **D. Annual Calendar Template**
- **E. Contact Directory**