



Open Scholarship Initiative

Community Playbook

Simon Fraser University

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Contributors:
Gracielle Higinio, Community Manager
Kelly Shen, Program Director

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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).

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

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).

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.
-

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

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

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**