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## Programmatic Review Process Guide

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# Grand Valley State University Libraries Programmatic Review Process Guide

Last Updated: August 2020

Written by Executive Team, in consultation with Libraries Leadership Team

*This is paired with a Timeline Implementation Plan, Communication Plan, and templates. These have been added to the Appendix for convenience*

## Context

The continued demographic decline in college-aged individuals has led the University to review its budget size and overall offerings. Additionally, the global pandemic has led to a further estimated drop in enrollment for the Fall 2020 semester. Any drop in enrollment will result in drops in revenue, and therefore, budget shortfalls heading into the 2021 fiscal year.

The principles, prioritization approach, and decision-making criteria outlined in this document reflect the work of the Executive Team, with deep input from the Leadership Team. In assembling the list of potential “first round” cuts required by the Provost, the Executive Team leveraged these as well as the prior lists from the Budget Advisory Group, faculty and staff input at the fall town hall, and input from Leadership Team. Each college and unit were asked to submit potential budget cuts for fiscal year 2021 at three different levels of reduction by the end of May 2020.

The required holistic programmatic review must be completed for the Provost by end of the 2020-2021 academic year. Moving forward, in order to evolve our services in a constrained budgetary environment, we will be best suited to continue active review, assessment, and re-prioritization. This framework will enable us to learn and iterate an ongoing process for the Libraries to evaluate and prioritize its resource allocation.

## Leading Our Change

As the Libraries look forward to its near-term future and next strategic planning cycle, we need to do a holistic programmatic review. The programmatic review will allow us to reaffirm our core mission, the meaningful work that advances it, and identify the work we can stop or change. We will review our work throughout the entire organization. Additionally, this will align with the work of the University to review its work and our needs to reduce our budget in strategic ways.

As resources remain constrained, we must ensure that our work reaches as many stakeholders as possible. The scale and scope of our work must be sustainable within available resourcing. We recognize there is no “one-size-fits-all” solution to our user needs, yet we will focus on the needs of the many and seek to meet the needs of the few using an equity lens. The Libraries continue to value and actively contribute to providing high impact learning opportunities to students.

The Libraries preserve our agency and ability to act strategically by proactively identifying ways to reduce our expenditures. We need to both review what we can stop doing and what we can do differently. There will be items core to mission that could be done more efficiently or with reduced service expectations. We define core to mission as the academic success of the institution. The approach to meeting our mission must be balanced with scalability and sustainability.

We will ensure this process also aligns with our stated workplace principles:

- Ask how this benefits students
- Enable an entrepreneurial culture
- Informed risk-taking
- Approach each other with empathy and respect

We will leverage evidence-based decision-making in order to emphasize the ‘informed’ aspect of informed risk-taking.

## Libraries Mission Synthesized

The Libraries support and advance the delivery of quality education by doing the work of: Collecting, teaching, displaying, discovering, disseminating, and preserving information.

The Libraries’ Leadership Team sees the following as core library functions:

- Curating a balanced, inclusive collection that supports the curriculum
- Supporting infrastructure for information retrieval
- Strengthening information literacy in students and researchers
- Cultivating an inclusive, safe co-curricular learning environment

It is understood that library functions might be delivered in a streamlined manner to require less resources.

## Core Workplace Principles Defined

**Asking how something benefits users** helps us center our “raison d’être”. Our core mission is the academic success of students as well as the teaching and scholarly success of the faculty.

Centering the benefits will help us start new things and stop things when the benefits no longer have a key impact.

By **taking informed risks**, we are using evidence-based approaches to innovation and risks to ensure that we are risk tolerant, sustainable, and learning from failure. We are ensuring that we are not chasing trends; rather we are meeting local needs and advancing our strategic directions. We are using the best available information to center our practice.

**Sustaining an entrepreneurial spirit** means that we want to have autonomy to try new things. Entrepreneurs are informed and check in to make sure that their ideas and innovations are having intended effects. They try to learn from what works and what does not. We work together, alone together, and alone. We are networked nodes, not silos, and all at once.

**Approach each other with respect and empathy** is key to maintaining the relationships and the self-esteem of others. We focus on the situation, the behavior, the issue, not the person in giving constructive/formative criticism. We are a strength-based organization, where feedback is a gift and duty. We are a culture based in bringing compassion to situations and colleagues while managing the impacts and outcomes. We are a culture that fosters creative tension, works through conflict, and does not condone fighting behavior.

## Design Principles

There are 3 overarching areas of consideration for prioritization. Within each, there are questions to help guide the thinking as we work through each consideration.

Programmatic areas, services, resources and projects need to:

- Contribute to the core mission of the Libraries
- Enable active stewardship of University resources
- Align with University Libraries Strategic Plan and Priority Initiatives

## Design Principles - Prompting Questions

These questions were synthesized from the conversations the Executive Team, Leadership Team, and the Budget Advisory Group had during the first request for the fiscal year 2021 budget reductions proposal, in the early part of Winter 2020 term.

- I. Contribute to the core mission of the libraries, in priority order, by:
  - A. Supporting student academic success
    - Will not doing this impede current student success?
    - Will not doing this negatively affect future student recruitment/retention?
  - B. Supporting faculty teaching
  - C. Supporting faculty collaborative research efforts with students
  - D. Supporting faculty research needs

- E. Supporting access to information beyond the GVSU community through output of faculty research and scholarship of teaching
- II. Enables active stewardship of University resources
  - A. Meets a current or emerging need
    - What is the evidence of the need for campus?
    - What University goal or initiative will go unsupported if this is scaled down or paused?
  - B. Supports efficiency
    - Can this be done with existing resources?
    - Can we scale down to deliver a minimally viable approach with less resources? (theory of “good enough”)
    - Is this sustainable (budget and staffing)?
    - Does the benefit(s) outweigh the full cost (in resources) of doing it?
  - C. Maximizes scalability, reach, and efficacy
    - How can the number of impacted students benefiting be increased?
    - Does it produce the intended positive results? How is the value demonstrated?
    - Do we need this to enable something else?
- III. Aligns with University Libraries strategic plan and priority initiatives by:
  - A. How does this enable a Library strategic goal?
  - B. How does this support the Libraries’ role in a campus wide initiative?

## Process

The programmatic review will explore all programmatic areas of the Libraries, including services, resources, and projects. The review will explore the programs’ and projects’ outcomes, the resources they take, and the impacts they have on our learning community.

The conversations we have and information we gather will help the Libraries make decisions about what services and resources to continue, streamline, start, or what to phase out.

In order to gather these recommendations, unit heads and project leads will organize conversations using templates to gather relevant information and focus the input from individuals. As we ask questions, we each need to consider the impact on the whole organization rather than individual team's work. We will provide templates in order to support an even process, an ability to focus on the content of the process, asking similar questions, and enable agency in documenting.

We will prioritize areas for review by:

- Possible scale of savings
- Known alternatives available
- Need for consultation with campus stakeholders/partners

- Feasibility and level of work required for possible change to the service
- Interdependence - decision would impact or lead to other decisions

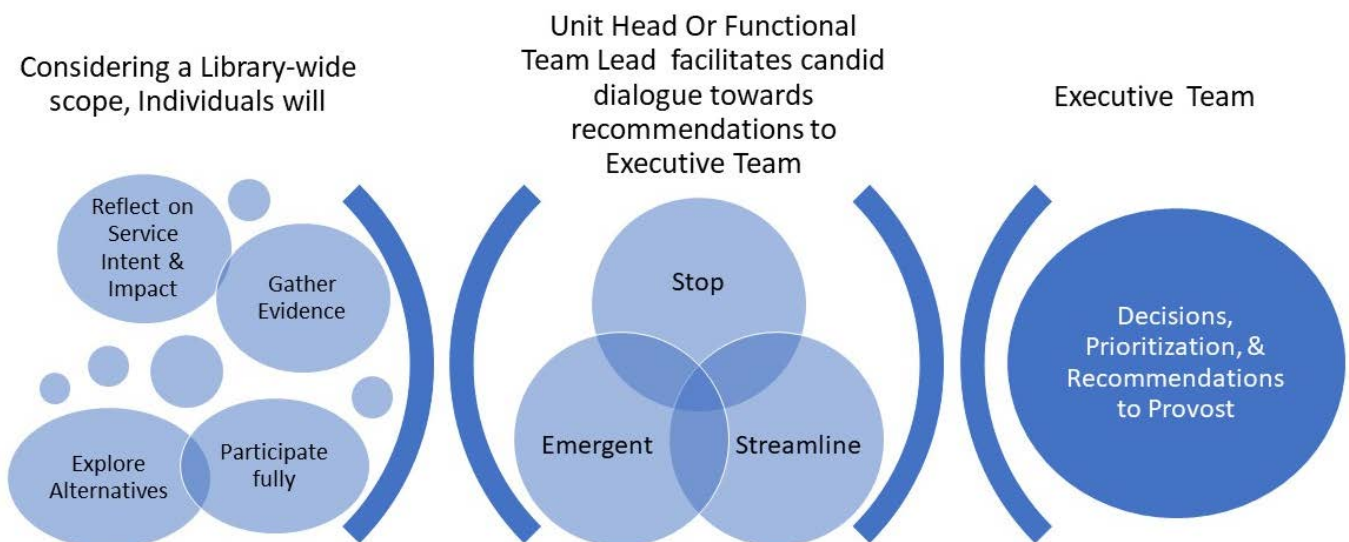
To support the work, we will break up areas for review into several phases. The first phase will allow us to pilot a few areas of review to finesse the process. An implementation plan will be created that will detail timelines, communications, and templates will be released as part of phase 1. The content of future phases will be iterated by dialogue at Leadership Team.

The longer-term goal is to incorporate this practice into our ongoing goal setting and strategy setting work. This practice critically engages with our programs and services to enable continuous work towards improvement and sustainability.

## Roles & Responsibilities

The Libraries is committed to participatory management. This includes the inclusion of shared governance at the unit levels and the use of broader shared governance processes as codified. By having the expectation of deep engagement at the unit and team level, the Libraries enable the use of local agency in drafting recommendations and decision-making. In the event of a reorganization, within PSS, AP, or Faculty ranks, Library Leadership must meet contractual obligations and use the codified governance processes. It is the expectation that unit heads and impacted staff or faculty members will be engaged in clarifying workload change.

High-level graphic overview for those who benefit from visual representation of concepts. Detailed table below graphic.



	<b>Individual team members</b>	<b>Unit Heads</b>	<b>Functional area leads (If not Unit Head)</b>	<b>Exec team</b>
<b>Roles</b>	Reflect on purpose and impact of project/program/service	Gather and synthesize input from teams  Communicate recommendations and rationale	Gather input and evidence  Facilitates discovery of alternative approaches	Leads the overarching process  Synthesizes overall recommendations and sets priorities
<b>Expectations</b>	Contribute to the conversation considering the needs of the organization as a whole  Gather evidence  Be willing to explore alternative solutions  Listen with active curiosity, aware of own biases	Consult with functional area leads to pull information together  Coordinate and lead conversations to explore programs and allow individuals to provide input.  Listen to all input with active curiosity, aware of own biases  Communicate clearly, with transparency  Compile recommendation and communicate it to exec team	Coordinate and lead conversations to explore programs and allow individuals to provide input.  Coordinate and lead conversations to explore programs and allow individuals to provide  Listen to all input with active curiosity, aware of own biases	Consider recommendations and rationales  Ask questions with active curiosity to seek understanding while managing biases  Make final decision  Communicate decisions  Provide priorities and timeline for phases  Liaise with campus administrators and external stakeholders
<b>Outcomes</b>	Provided input, feedback, and data as requested	Finalized recommendation with associated rationale	Completed evidence template  Participated in formulating recommendation	Articulated decisions and rationale  Provided recommendations to Provost  Led library-wide communications

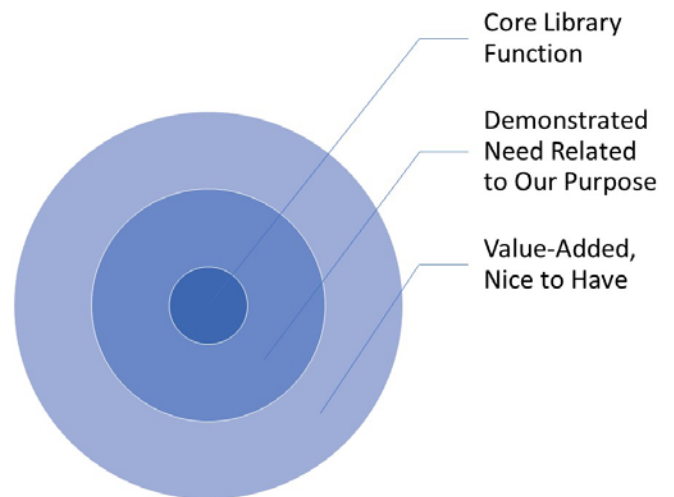


## Prioritization & Decision-Making

Our decision-making is guided by our core workplace principles and our process design principles. Inclusion, diversity, equity, and accessibility (IDEA) is central to all of the work we do, and in how we approach all decision-making. This section articulates how the Libraries Leadership Team will make decisions around prioritization and continuity.

As the Executive Team reviews the unit outputs, we will leverage the following prioritization criteria. All final decisions will be made by the Executive Team, in consultation with the Provost and other campus administrators. In many areas, our decisions will be recommendations to the Provost and the President. As we look to our decisions, and we will prioritize by:

- Preserving the essence of core library functions with a focus on operational needs
- Advancing demonstrated needs that align with our purpose as an academic library
- Aligning with library goals and mission
- Ensuring sustainability and feasibility, both short-term and long-term
  - Balancing available resources with continued innovation
  - Considering alternatives with lower resourcing needs
  - Considering if the need is being met elsewhere
- Minimizing negative impact and maximizing scale



## Working Assumptions

We will:

- Center our work in the core workplace principles and inclusive practices
- Focus on student academic success and curricular support/alignment
- Seek efficiencies, reducing redundancies, and strategically adjusting service expectations
- Align work assignments with organizational needs, in accordance with contractual obligations and shared governance processes
- Support continued innovation to advance our Libraries' mission
- As a Leadership Team, continue to engage in participatory management and leadership practices, consulting with those impacted as much as feasible
- In reducing workforce, prioritize vacant lines

## Success Criteria

This prioritization review **process** will be successful if it:

- Is completed within established timeline
- Supports efficient and streamlined decision-making
- Enables engagement by faculty, staff, and key campus stakeholders
  - Provides transparency into process
  - Has clear pathways for input and feedback
  - Engages those most impacted
- Takes into account our organization needs and capacity for supporting campus requirements and priorities
- Enhances understanding of decisions

The **outcomes** of this process will be successful if they:

- Achieves greater fiscal sustainability, including cost reductions
- Enables feasible workloads
- Allows for iterative and streamlined adoption of an ongoing prioritization process
- Seeks to mitigate negative impact on academic success
- Articulates the rationale of decisions for stakeholders

# Appendices

## Working Definitions

*Working definitions are provided for terminology within this document as well as might arise in discussions about the process. Shared working definitions allows us to “be on the same page”.*

**Active Stewardship:** Informed, intentional, and active approach to managing resources provided by the University in order to meet our mission.

Example: Multi-year budget planning and projections.

**Efficacy:** The ability to get the work done with reasonably affordable resourcing as well as intended results.

**Evidence Based:** Research and data that support the why/what/how of our work. This is decision making based on quantifiable data and qualitative information.

**Feasible/Feasibility:** Possible for the UL to accomplish within the budget and staffing resource levels that we have or will have in the near future.

**Functional Team/Team:** A group of faculty or staff working on any project regardless of reporting lines. This can be a finite project or a standing library service.

**Operational:** Something that helps things to work smoothly today, and requires constant attention, while. “**Strategic**” is something from the world of top managers, defined for a longer-term, often less tangible, but still very important

Examples: opening the library, cataloging books, creating subject guides for our users.  
It’s the work we do every day.

**Program:** A distinct package of work or services that the libraries offer.

Example: We have a scholarly communications program that encompasses support and advocacy for Open Access, Author Rights, and Open Educational Resources.

**Programmatic Area:** Services, tools, support, resources that we provide for the GVSU community.

Example: Providing physical access to a library building.

**Project:** A one-off. It has a start and finish, while not ongoing, the end result may become part of a programmatic area or added to an operational area.

**Resources/Resourcing:** includes the money, space, and the work time needed for a service, project, or program.

**Return on Investment (ROI):** Overall cost vs. impact.

**Service:** Anything we provide for the University and wider Community.

Examples: Document Delivery, reference consultations, the collection itself.

**Strategic:** This is longer term work, goal setting, aligning our work with the mission and vision of the university libraries. Work that we do to position the library to support University needs and direction. This is different from our operational (see above)

Example: Our decision to migrate to FOLIO software, cutting down on costs while allowing us to have more input and control over the development of the software. In this example, actually migrating our data to the software would be operational while the decision to explore and ultimately adopt the software was strategic.

**Sustainable:** Work that is able to be completed on an ongoing basis with the resources allocated.

**Unit:** team or group of team members working together in one reporting line. This differs from Functional Teams.

Example: Liberal Arts is a Unit.

## Implementation Timeline

Leadership Team

Drafted July 2020, updated quarterly

This is a preliminary timeline, which may need to be adjusted as the process progresses. Each phase articulates the planned programs under review. Ahead of each phase, Leadership Team will work collaboratively to update the timeline and programs to be reviewed.

Though all stakeholders will be identified, the primary stakeholders will be those most actively involved in each program review. Other stakeholders will be consulted or informed as appropriate. Feedback loops will be an expectation of the process. Refer to the communication plan for more details.

## Phases

Phase 0: Process Roll out - May/June

- Articulate process and timelines
- Share process and create shared understanding
- Identify some quick wins or low hanging fruit
- Gather areas of review and solidify sequencing

### Phase 1a - July

Decision-making criteria are being used, not the full process and tools. Review work began/was completed prior to implementation of the programmatic review process.

- Course Reserves (Operations & User Services)
- Building Hours - Mary Idema Pew, Steelcase, Frey (Operations & User Services)
- Budget cut proposal (Executive Team and Leadership Team)

### Phase 1b - July to October

Test drive the full implementation plan to pilot it. Programmatic areas selected based on scope and timeliness of decision-making.

- Collection Development - Review of Big Deal and spends above \$75K (Collections & Digital Scholarship and Systems & Discovery)
- Open access publishing fund (CaDS)
- Liaison Outreach Service Expectations (Liberal Arts and Professional Programs)
- Off the Shelf (Communication Functional Team and Off the Shelf Team)
- **Plan for next phase (Leadership Team)**

Note: Heading into Fall, Operations & User Services is expected to manage COVID19 scheduling and operations.

### Phase 2 - October - December/January (Tentative)

- Communication & Marketing Outputs (Communication Functional Team)
- Workforce Dev & Org Development
- Digitization & Digital Preservation
- Library Research Scholars (Liberal Arts)
- Budget management (Dean's Office)
- Operations & User Experience Departmental Workload Planning - Part 1
- **Plan for next phase (Leadership Team)**

### Phase 3 - Tentative

- Operations & User Experience Departmental Workload Planning - Part 2
- User Engagement
- IDEA committee approach
- Instructional methods
- Events & Programming
- Collection Maintenance (lifecycle management)
- **Plan for next phase (Leadership Team)**

### Closing Phase

- Post-mortem on process for process improvement
- Identify pieces that fit in ongoing strategic planning and yearly planning efforts

## Communications & Engagement

Stakeholder Group	Communication Needs	Medium/Approach	Frequency & Timing
Libraries Faculty and Staff (all staff)	Overarching vision and purpose of programmatic review	COVID-19 Email or Blog Post from the Dean, followed by town hall	One documented message at the outset, archived publicly for future reference
Libraries Faculty and Staff (all staff)	Space to give voice and ask questions	Townhall	Two virtual town hall meeting options at the beginning of the reviews (preceded by email above)
<b>Optional:</b> Libraries Faculty and Staff (all staff)	Follow up synthesis of feedback heard at townhalls	COVID-19 Email or Blog Post from the Dean <b>[dependent on if the context, process changes based on feedback heard at town halls]</b>	One documented message at the outset, archived publicly for future reference
Faculty/Staff Heading up Review Documentation	Standardized process for conducting a review, providing Executive Team the information that they need to decide	Review Process Template (Build off Design Principles/Guiding Questions)	Emailed once at outset of a program review (see below)
Libraries Faculty and Staff (all staff)	Context and Purpose for Review Process template, program review timeline, list of programs under review	COVID-19 Email or Blog Post from the Dean: provides transparency of process shares Program Review Template	One documented message at the outset, archived publicly for future reference
Campus Deans and ADs	Notification that program reviews are occurring	Email	Once
Departments directly impacted by service change	Awareness that a service in their work is being reviewed	Email from department head	Emailed once at outset of a program review

[This is where phases would restart]			
Campus partners of reviewed services	Awareness that review is occurring / general overview of the process	Email	At the outset of any review that includes a program with direct campus partners
Supervisors of Review Leads (Department Heads / ADs)	Knowledge of progress on reviews / access to questions the reviewers might have	Emails / Check-ins	Periodically during the review process
Executive Team	Complete review of program	Completed Program Review Template	Once at the end of the review timeline
<b>Optional:</b> Executive Team	Input on review deliberations	Leadership Team Meeting *may want invite review leads not on LT depending on input needed*	As needed
Executive Team	Consistent messaging in sharing decisions of individual programs	Review Response Template  Decision Log	Completed for every program under review
Leadership Team	Overview of decisions	Leadership Team Meeting	Once at the end of review deliberations
Review Leads (if not on Leadership Team)	Decisions based on submitted reviews	Meeting with Executive Team representative / "Review Response" template for wider sharing	Once at the end of review deliberations
Campus partners of reviewed services	Awareness of decisions that directly impact their workload	*Dependent on decision* Meeting with Program Reviewer or Meeting with Program Reviewer and member of Exec Team followed up with email	Once at the end of review deliberations
Libraries Departments directly impacted	Decisions based on reviews	Department Meeting	Once at the end of review deliberations

by service change			
Libraries Faculty and Staff (all staff)	Overview of all program review decisions	COVID-19 Email or Blog Post from the Dean -- potentially attaching completed Review Response Templates and decision log	One documented message, archived publicly for future reference
<b>As needed:</b> Optional to those impacted by a service reduction	Opportunity to mourn/celebrate the end to service	In-Person/Virtual Meeting (dependent on status of COVID-19) *work may want to be done to plan what these might look like	As needed, dependent on decisions -- could group based on phase
Departments directly impacted by service change	Awareness that a service in their work is being reviewed	Email from department head	Emailed once at outset of a program review
Libraries Faculty and Staff (all staff)	Announcement of phase two reviews and timeline / articulate any changes to process if phase one resulted in any changes	COVID-19 Email or Blog Post from the Dean	One documented message, archived publicly for future reference
Restart at Line 8: "Campus Partners impacted by Service"			



## Templates: Programmatic Area Review: Questions for Discussion

[These can guide group conversations and/or be used to gather input via surveys]

Please reflect on how this programmatic area contributes to the **core mission of the libraries**. You'll use these ideas to contribute to recommendations your area lead and/or department head will make to Executive Team. The purpose of these conversations and recommendations are to make clear about how our work relates to the core mission and to provide an opportunity to reimagine how we fulfill our mission.

1. How does the programmatic area contribute to GV Libraries' **core mission**?
  - A. Support Student academic success
    - Will not doing this impede current student success?
    - Will not doing this negatively affect future student recruitment/retention?
  - B. Support faculty teaching
  - C. Support faculty collaborative research efforts with students
  - D. Support faculty research needs
2. Please consider how this programmatic area enables **active stewardship** of University resources.
  - A. Please describe the active or emerging need this programmatic area meets.
    - What evidence do we have that this supports the Grand Valley learning community?
    - What University goal or initiative will go unsupported if this is scaled down or paused?
  - B. Please describe the efficiency of the programmatic area
    - Can this work be done with existing resources?
    - Can we scale down to meet the core need(s) with fewer resources?
    - Is this sustainable (budget and staffing)?
  - C. Scalability, reach, and efficacy of programmatic area.
    - How can the number of impacted students be increased?
    - Does it produce the intended positive results?
    - How is the value demonstrated?
    - Do we need this to enable something else?
3. Alignment with **University Libraries strategic plan and priority initiatives**.
  - How does this enable a Library strategic goal?
  - How does this support the Libraries' role in a campus-wide initiative?

- Who are the stakeholders?

## Templates: Programmatic Area Review: Programmatic Areas Recommendation

**[These are to guide programmatic area leads in writing the recommendation.]**

*Please use data and the reflections of the individuals in the programmatic area summarize the conversations and to make a succinct, no more than two-page recommendation to Executive Team about whether to continue the program as-is, revise practices, or to discontinue the programmatic area.*

Name of Programmatic Area:

Department Accountable for Programmatic Area:

Date:

### **Recommendation:**

What changes do you recommend?

**This programmatic area will be [pick 1: kept as is/streamlined/stopped]. In our assessment, it is [pick 1+: core/value-added/nice to have]. Moving forward, it will [pick 1: be maintained/evolve and align/end].**

### **Rationale:**

1. How does the programmatic area contribute to GV Libraries' **core mission**?
2. Please describe how this programmatic area enables **active stewardship** of University resources.
3. Please describe the alignment with **University Libraries strategic plan and priority initiatives**.
4. Who are the stakeholders and how might they be affected by these changes?
5. What does our evidence tell us about the need and impact of these recommendations?

**This programmatic area will be [pick 1: kept as is/streamlined/stopped]. In our assessment, it is [pick 1+: core/value-added/nice to have]. Moving forward, it will [pick 1: be maintained/evolve and align/end].**

## Templates: Grand Valley Libraries' Executive Team Decision Rationale

Name of Programmatic Area:

Department Accountable for Programmatic Area:

Date:

*CONTEXT and instructions of Template*

In coming to a decision, the Libraries' Executive Team relies on the design principles as well as the prioritization and decision-making criteria outlined in the UL Programmatic Review Process Guide.

### Overview

*What is under review? Who does it serve? Which internal units and/or campus partners are involved?*

### Decision of Libraries' Executive Team

**This programmatic area will be [pick 1: kept as is/streamlined/stopped]. In our assessment, it is [pick 1+: core/value-added/nice to have]. Moving forward, it will [pick 1: be maintained/evolve and align/end].**

*Several sentences articulating the 'what' of the decision*

### Rationale

*Articulate the why of the decision*

### Mission & Strategy

- *How does this advance the mission and institutional strategic priorities of the University?*
- *How does it align with or advance the Libraries' mission?*
- *How does the service/program leverage library expertise and purpose to meet university needs?*
  - *How is/would campus meeting this need otherwise? Are there other departments/units on campus that provide a duplicate or similar service?*

### Stewardship

- *How do benefits align with the resourcing needed to offer?*
- *What efficiencies does this change create?*
- *What does our evidence tell us about the need and impact?*

### Stakeholders

- *How will students and faculty experience change as a result of the decision? What alternatives exist?*

### Path Forward

*Articulate who is responsible for defining and implementing the path forward to implement the decision. They, along with their team members, will operationalize the decision. Indicate if and what supports is available from the Executive Team.*

## Templates: University Libraries Programmatic Review Decision Log

*This template serves as a log of the decisions as it moves from recommendation to final. This template is an Excel spreadsheet. The headings are shared here in order.*

- Programmatic Area
- Final Decision ~ *This denotes that the decision-maker in some areas lies outside of the Libraries*
- Final Decision Date
- Executive Team Decision
- Executive Team Assessment
- Executive Team Moving Forward
- Parties Consulted by Executive Team
- Exec Team Decision Date
- Reviewers Recommendation
- Reviewers Assessment
- Reviewers Moving Forward
- Parties Consulted by Reviewers
- Date Submitted