

Priority Objectives 2005-2006



Cornell University
Library

1. digital collections | 2. oais | 3. information fluency | 4. marketing & outreach | 5. secure resources |
6. document delivery | 7. electronic publishing | 8. scholarly communication | 9. identify skills

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THE NOVEMBER 18, 2004 STAFF MEETING TO REVIEW THE CUL PRIORITY OBJECTIVES FOR 2005-2006

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NOTES FROM THE DISCUSSION GROUPS

On Thursday, November 18, the Library Management Team sponsored a meeting of the Library's academic and many exempt staff to discuss the Library's priority objectives for the period 2005-2006. Small group discussion sessions were arranged throughout the day, each session focusing on one of the nine priority objectives that the Library Management Team had agreed on earlier in the fall. Meeting participants were asked to sign up for up to two sessions each.

The small group discussion sessions were organized to allow each participant to comment on and suggest adjustments to: 1) the statement and explanation of the objective itself; 2) the implementation steps to accomplish the objective; 3) the Library's potential partners; and, 4) measures of success. The goal was to provide an opportunity for the participants to help sharpen the definition of the Library's goals, objectives and priorities and to focus on how best to get them accomplished.

The Library Management Team has scheduled two long follow-up sessions in early December to finalize the Library's plan by the start of 2005 .

Contents:

Objective 1. Develop an Integrated Framework for CUL's Digital Collections.

Objective 2. Build an OAIS-Compliant System for Managing Cornell's Digital Assets.

Objective 3. Work with faculty and librarians to develop strategies to incorporate information fluency competencies into the curriculum at all levels.

Objective 4. Effectively market the library's products and services and expand outreach and communication to new and underrepresented constituencies.

Objective 5. Secure the resources to meet CUL's goals and objectives.

Objective 6. Expand and coordinate document delivery services to facilitate use of both digital and analog information.

Objective 7. Operate an electronic publishing program capable of systematic production and distribution of journals, monographs, and multimedia compositions and foster alternatives to conventional publishing.

Objective 8. Respond to the crisis in scholarly communication by clarifying alternatives for publishing outlets for faculty and others at the University.

Objective 9. Identify the skills and resources needed for library innovation and develop new competencies by training and recruiting.

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Objective 1. Develop an Integrated Framework for CUL's Digital Collections.



Provide an integrated discovery framework for CUL's digital collections in order to give users at Cornell and around the world a powerful and easy way to search across our collections and to retrieve integrated sets of results. The framework will allow digital collections to be searched collectively while still allowing them to be searched individually in their native interfaces. Reach consensus and operationalize a set of best practices to underpin CUL digital collection building, federated access, and sustainability.

Implementation

- *Project initiation:* Initiate a project to build a CUL integrated framework for digital collections, using the proposed requirements and system architecture as described in the report "An Integrated Framework for Cornell University Library Digital Collections: High-Level Requirements and Internal Implementation Issues," for an initial set of CUL collections.
- *Project team:* Assemble and charge a project team. Have the team further refine the high-level requirements laid out in the report before beginning to build the framework.
- *Statistics:* Engage IRIS Research and Assessment Services to develop more comprehensive, meaningful, and accessible measures of CUL digital collection usage and user behavior.
- *Security and recovery:* Develop shared common practices for security and recovery for CUL digital collections and the integrated framework.
- *Establish a CUL Digital Collections Program:*
 - Create and achieve consensus on CUL best practices and organizational structures for creating, sharing, sustaining, and documenting CUL digital collections, as laid out in the report section "Best Practices."
 - Through an examination of case studies, recommend CUL organizational structures that assign clear responsibility, accountability, and long-term support for every CUL digital collection, existing and prospective.
 - Reach consensus on a CUL collection development policy to guide what digital collections are built and how they relate to each other, the integrated framework, and national and international digital library initiatives.
 - Reduce the number of delivery systems as appropriate; reach a CUL consensus on criteria/guidelines for deciding when to use what platform.
 - Evaluate, and realign as needed, funding and resource allocations to CUL digital collection building projects and the integrated framework.

Potential Partners

- Digital Library Federation: Distributed Open Digital Library (DODL) and OAI Best Practices Working Group.

- Other institutions with digital content related to CUL's digital collection holdings.
- The European Library (TEL) project.
- Others developing search and retrieval via URLs (SRU) and XML gateways.
- CIT.
- Faculty members and others at CU who are developing digital content.
- Luna Insight.
- Endeavor.
- Developers of DLXS.
- IT companies

Measures of Success

- Ease of finding and connecting to CUL digital collections (as measured by user satisfaction, increase in awareness/usage).
- Conformance of CUL digital project teams to agreed-upon CUL best practices.
- Emergence of a CUL digital collections program (as opposed to a variety of projects) with more-organized long-term support for digital collections.
- Increase in number of OAI-harvestable CUL digital collections.
- Increase in interactions with other institutions delivering digital content related to CUL holdings.
- Participation in large-scale initiatives such as DODL as a data provider.
- More efficient and effective use of digital collection delivery platforms at CUL.
- Enhanced level of funding and human resources allocated to CUL digital collections and the integrated framework.

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Objective 2. Build an OAIS-Compliant System for Managing Cornell's Digital Assets.



In collaboration with CIT and external partners, establish within three years a fully functioning, administratively supported, and sustainable OAIS-compliant repository system for managing and preserving Cornell University's digital assets, extending beyond the library to encompass university records of continuing value. This system must meet or exceed certification requirements currently being defined.

Implementation

- Ensure collaboration both within the university and beyond.
- Secure institutional commitment to this process that reaches the highest administrative levels of the university.
- Work with other partners to build this system and to ensure compatibility with OAIS-compliant repositories that other institutions are creating or committed to creating (e.g., Harvard, CDL, Michigan, Texas, Library of Congress, as well as those in other countries such as the Koninklijke Bibliotheek).
- Recommended three-year plan:
 - Year 1: Education, draft policy dissemination, stakeholder selection and buy-in, requirements development, request for information, partnership selection, gap analysis, cost analyses. The gap analysis will focus on five digital assets: digital image collections, Euclid journals, ArXiv pre-prints, USDA materials, and university content (material in D-Space, University Press, e-journals, university records, Web content management system).
 - Year 2: Develop partnership agreements, develop implementation and business plans, begin development phase.
 - Year 3: Continue and complete development.
 - Year 4 and on: Populate and maintain digital archive.

Potential Partners

- CIT.
- Institutions creating or committed to creating OAIS-compliant repositories.
- IT companies.

Measures of Success

- Tasks accomplished each year.
- Becoming a certified OAIS repository system.
- Interaction with other OAIS-compliant repositories.

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Objective 3. Work with faculty and librarians to develop strategies to incorporate information fluency competencies into the curriculum at all levels.



Working with faculty and other partners, define information fluency learning objectives for incorporation into the curriculum. Assess the effectiveness of the Library's instructional program and enhance the program as needed to ensure that these learning objectives are being met. Emphasize the role of librarians as consultants and participants in the instructional and research programs of the university by contributing to the educational mission of the university through partnerships with faculty and students.

Implementation

- Host a nationally recognized speaker or speakers with expertise in information fluency to provide guidance.
- Charge a working group to carry out the steps below:
 - 1) Define information fluency learning objectives.
 - Define baseline information fluency learning objectives for Cornell students, i.e., what all Cornell students should know with regard to information fluency regardless of their standing/level and discipline.
 - Define information fluency learning objectives for Cornell students at various stages of their "careers," e.g., at freshman orientation, as participants in freshman seminars and other introductory undergraduate-level courses, as participants in undergraduate research-level courses, as graduate students.
 - Define specific *discipline*-based information fluency learning objectives for Cornell students, researchers, and faculty.
 - Define information fluency learning objectives for special categories of Cornell community members, e.g., international students, as well as non-student groups, e.g., office professionals.
 - 2) Engage the faculty to define information fluency learning objectives and to incorporate the objectives into the curriculum.
 - 3) Partner with the Center for Learning & Teaching and the Learning Strategies Center to define information fluency learning objectives and to incorporate them into the centers' programs in order to reach more students.
 - 4) Assess the effectiveness of our current instructional programs in meeting the information fluency learning objectives.

5) Enhance the Library instruction program to ensure that the information fluency learning objectives are being successfully met.

Potential Partners

- Center for Learning & Teaching.
- Learning Strategies Center.

Measures of Success

- Defined information fluency learning objectives as described above.
- Determined means by which to gauge information fluency (e.g., outcome-based results).
- Engaged the library's instruction community.
- Partnered with the faculty.
- Partnered with the Center for Learning & Teaching and the Learning Strategies Center.
- Made the university administration aware of the importance of information fluency for the Cornell community, not only in regard to its impact on a successful education experience at Cornell, but also on lifelong learning.
- Reached more students and improved their information fluency.

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Objective 4. Effectively market the library's products and services and expand outreach and communication to new and underrepresented constituencies.

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Expand services (e.g., programs, collections, professional skills sets, products, etc.) and develop a comprehensive outreach program to our current and potential user constituencies including faculty and students, alumni, library staff, and the local and New York State community.

Implementation

- Identify our audience.
- Inventory current outreach activities.
- Identify the gaps.
- Develop a strategy to close the gaps by working with a marketing consultant.
- Identify an outreach coordinator who will work with all the staff who are involved in outreach activities.
- Effectively market the things that we do well.
- Hire director for communications and media relations.

Potential Partners

- Tommy Bruce and Communication Strategies.
- Rather than partner with another institution, we should explore successful programs in other places.

Measures of Success

- Identified gaps have been filled.
- Expanded audience and their awareness of our services as determined by an analysis every two years.
- Users are satisfied with our products as measured by feedback and improved access, productivity, learning, teaching, and scholarship.
- Non-users are identified; strategies developed to reach them.

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Objective 5. Secure the resources to meet CUL's goals and objectives.



Increase the funds coming from individual and corporate donations and from foundations and other granting agencies.

Implementation

- Identify and communicate library campaign priorities.
- Review funding potential of external agencies.
- Identify 10 foundations not approached within the past 2 years and match up with their priorities.
- Obtain permission to approach certain agencies if necessary.
- Link to university campaign priorities and coordinate all donor and external foundation efforts with the university campaign.
- Determine if development staff needs to increase in size for the campaign and if the university would help pay for it.
- Focus the work of Library External Relations on the campaign and developing new contacts.
- Consider sending members of LMT on the campaign trail.
- Have the University Librarian increase the amount of time spent on fund-raising (10-20% during campaign) and contacts made.
- Cultivate emeritus faculty and the local community—consider seminars on library services and perhaps more-focused ones, such as "How to Preserve Old Photographs."
- Cultivate class officers for class reunion gifts.
- Get more involved with parents and faculty groups in addition to reunion activities.
- Meet with chair of Library Advisory Council and establish sub-committee to focus on fund raising.
- Have 'Internet café'-type availability to library computers for Trustee/Council Weekend with appropriate opportunities for giving identified; also have PR presence in trustee/council information packets.
- Develop support for grant writing.

Potential Partners

Library Advisory Council.

Measures of Success

Increased external funding by 20%

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Objective 6. Expand and coordinate document delivery services to facilitate use of both digital and analog information.

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Simplify the delivery-request process to make it a seamless and unmediated service. Investigate e-reserve, electronic document delivery, and ILL operations and service standards to determine operational relationships to digitization for collection building.

Implementation

Necessary are:

- A shared vision,
- Staff time,
- Programming support,
- Purchase/lease of upgraded software, server space, and scanning equipment.
- Fees: whether to charge and what to charge for different services.
- Intermediate steps to implement various stages and programs: desktop document delivery through a single system (scheduled for fall 2004 semester), delivery of circulating monographs to departmental mailboxes (scheduled for spring 2005 semester), implementation of Rapid.
- Development of appropriate software to combine these programs (2005/2006).

Potential Partners

- Endeavor.
- Atlas.
- Borrow Direct group.
- Rapid group.
- RLG.
- OCLC.
- Review the possibility of partnering with DCAPS for delivery of scanned material and storage of digitized out-of-copyright material.

Measures of Success

- Patrons can use one "get it" button to identify desired items and trust that the items will be delivered to them without having to identify a source (ultimate success).
- Defined steps determined.
- User satisfaction measured.
- Financial costs assessed.

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Objective 7. Operate an electronic publishing program capable of systematic production and distribution of journals, monographs, and multimedia compositions and foster alternatives to conventional publishing .

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Ensure that our current initiatives—arXiv, Euclid, and DPubS—attain sustainability and then build on the success of these programs as we look to expand into new areas of publishing.

Implementation

- Develop integrated conceptualization of the various initiatives presently under way across the library that serve as a strong foundation for continuing expansion. These initiatives include: arXiv, *CTHEORY Multimedia*, *Indonesia*, cooperation with the CU Press in producing electronic versions of Comstock press publications and the electronic distribution of CU press books via the Race & Religion site, Computer Science Technical Reports, Historical Mathematics Monographs, publications available in DSpace and other digital repositories, and newly developing initiatives. (See Potential Partners, below).
- Envision these and future initiatives as related endeavors within a common framework and with common “branding” to facilitate production synergies and enable their promotion as a promising constellation of alternative publishing options.
- Develop integrated business models that ideally would ensure adequate revenue/funding streams to systematically support publishing over time. DCAPS management and services can be developed and employed in a manner necessary to enhance economies of scale in this effort.
- Identify and focus energies in a new area of publishing concentration to build a more-robust and sustainable publishing enterprise. Although an eclectic approach has significant benefits (particularly on campus), the operational and marketing efficiencies resulting from focused initiatives are essential to sustainability and to transformative impact.
- These implementations must be accompanied by an active promotion and marketing campaign designed to increase awareness, generate cooperative interest and involvement worldwide, and produce revenues/funding necessary to insure stable financial operation over time.

Potential Partners

- More mathematics and statistics publishers.
- Cornell University Press (current).
- Library and Press at Pennsylvania State University.
- Additional institutional relationships.
- American Mathematical Society (to add content to Euclid).
- Organizations and universities in Japan (to add content to Euclid).
- International Statistical Institute regarding citation services for the arXiv
- Professor Cooke in supporting his scholarly communication project employing DSpace (current).

- Professor Murray and faculty and artists internationally in publishing *CTHEORY Multimedia* (current).
- Asian Studies in supporting the publication of *Indonesia* (current).
- SPARC (Scholarly Publishing and Academic Resources Coalition).
- Institute for Social Sciences.

Measures of Success

- The enterprise is robust and efficient and financially and operationally sustainable (quantifiably measurable within three years).
- High-quality publishing services and content at reasonable costs to higher education and other consumers in a manner that enhances scholarly research and teaching (quantifiably measurable within three years).
- Systems and services that significantly contribute to empowering transformative change in the current academic publishing model.

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Objective 8. Respond to the crisis in scholarly communication by clarifying alternatives for publishing outlets for faculty and others at the university.

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Clarify responsibilities for responding to the crisis in scholarly communication. Make clear what the library community in general and CUL in particular need to do in order to succeed in this area. Do the necessary planning and take the necessary actions to succeed.

Implementation

Necessary are:

- A multi-level shared vision within the library, the university, and the academy;
- Dedicated staff;
- Appropriate means of information dissemination (Web sites, newsletters, etc.).

Potential Partners

- Other academic libraries.
- ARL.
- SPARC.
- Professional and learned societies.

Measures of Success

- Each person in the library should demonstrate a general understanding of the issues around scholarly communication, including e-publishing.
- Librarians should understand the issues around each discipline and their own subdisciplines and how copyright and open access relate to those areas.
- Increased awareness of issues among CU faculty and administrators.
- Increased publication in open access forums.
- Increased retention of copyright among faculty.
- Increased participation by the faculty in CUL's e-publishing activities.

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Objective 9. Identify the skills and resources needed for library innovation and develop new competencies by training and recruiting.

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Ensure that library staff members possess the necessary skills and competencies to meet the changing needs of the profession over the next five years.

Implementation

- Identify skills and competencies needed, both general and those specific to functional areas.
- Inventory skill and competency levels of existing staff.
- Identify the gaps.
- Prioritize the most critical needs.
- Develop a strategy to close the gaps through training, other educational opportunities and/or recruiting.

Potential Partners

- University Office of Human Resources
- Syracuse University School of Information Studies

Measures of Success

- Competencies are identified, agreed upon and prioritized.
- Recruitment and staff development/training programs are developed to enhance competencies throughout CUL.
- Percentage of staff with identified skills will be greater than initial baseline.
- More innovative solutions to current and future challenges.

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Notes from Discussion Groups: Objective 1. Develop an Integrated Framework for CUL's Digital Collections

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Group #2870

Facilitator: Jim Leblanc

Note-taker: Martha Hsu

LMT: Karen Calhoun

Attending: Marcia Clark, Michael Cook, Jonathan Corson-Rikert, John Ferreira, Surinder Ghangas, Peter Hoyt, George Kozak, Martin Kurth, Boris Michev, Barbara Morley, Steve Rockey, Gail Steinhart, Linda Stewart, Zoe Stewart-Marshall, Scott Wicks.

The objective :

- Is this like ENCompass? No, ENCompass is a single platform. We have many different platforms now, and we want to keep them, rather than just having one central one. We also want to take advantage of OAI harvesting, which could be done periodically.
- Will integrated searching be confusing? "Trees" in agriculture and "trees" in mathematics are quite different. Could we search various databases all together (yes), singly (yes), and in groups (probably). Groupings by format, across databases, would be more difficult. An integrated framework would involve an iterative process -- we would learn from the tool and adapt our methods. We would also hope to upgrade its capability as time went on.

Implementation :

- Implementation would be a huge job, probably done in phases. We would need to prioritize collections to be added to the integrated framework, and decide how to deal with our older digital collections that do not easily fit. What would we do first? -- Those that we can do quickly? -- or our most diverse (not solely text-based) collections? -- or collections with peripheral side-benefits, like the creation of a gazetteer from CUGIR that could benefit searching other databases? Implementation could be seen as a large recon project for digital resources. Mellon, who funded our current recon project, might be interested, if it were presented as such.
- Flexibility and continuity are very important in implementing this integrated framework. Each digital collection is funded separately and done separately, with different project leaders and requirements that are stipulated by outside agencies. We might add to our grant proposals a requirement that the project is able to hook into our system. People who write grants or design projects will ideally get together with people who select the interface. We need to assess and evaluate the interface before starting on a project, based on a consensus of best practices. We need to be able to harvest a very dynamic digital collection, allowing for change along the way. Collections do not remain static, although some change

more than others. Not only will the collections change, but the integrated framework itself will change as new search engines and other features are developed. The project team that is set up to work on this should be sustainable over time, regardless of shifting organization structures.

- Hardware has not been considered adequately in grant proposals; where to put the resources once they are created can be a problem. Some proposals have more space built in than is needed, and others have not enough. Flexibility of storage should be written into grants.
- User assessment needs to be addressed more fully. We need to measure more accurately the success of our digital collections, not relying primarily on the number of "hits." Ideally this would be done with outside partners, so that we wouldn't be assessing ourselves, or else with a very strong internal team. We should more fully understand what users really need. Users could be helpful in designing an interface, for example.
- Resources to develop this framework will have to come from new sources -- it cannot be done within the digital resource collections budget as it is. Funding is needed to ensure sustainability after a grant runs out. (MOA problems can't be fixed now, because there is no money to continue improving it.) We need endowed funds to ensure continuity.
- Enhancements might include offering print versions of titles in the digitized collection as a source of revenue, but an easy method of doing this would have to be developed.

Potential partners :

- Partnering will be useful with respect to funding, technology and assessment. Potential partners should see a partnership with us as beneficial to them. Partnering with outside institutions to build similar digital collections, with searching across institutions, would be ideal. Additions to the potential partners already mentioned: NSDL and Sun Microsystems.

Measures of success :

- Measures of success range from user "hits" to the opportunity for CUL to solidify a leadership position in digital library development. The percentage of our digital collections to which we can provide access through this integrated framework should increase over time.



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Notes from Discussion Groups: Objective 1. Develop an Integrated Framework for CUL's Digital Collections

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Group #2878

Facilitator: Xin Li

Note-taker: Petrina Jackson

LMT: Sarah Thomas, Ross Atkinson

Attending: James Alberts, Stuart Basefsky, Susan Greaves, Erla Heyns, Diane Hillmann, Paule Houle, Maureen Morris, Lakshmi Murthy, Margaret Nichols, John M. Saylor, Richard Strassberg

The objective

- Questions to consider: What do you mean by digital collections ? Who is the public for this?
- Need to show how the digital collections are heterogeneous but fit into a whole.
- Internal benefits vs. external (public) benefits need to be explored.
- Emphasis of this objective should be building a CUL digital program, not searching.
- As long as people can find the information they are looking for, they don't care where it comes from.
- We should stop looking at Google as opposition and use what they have without duplicating it. CUL can do more sophisticated things with it and can control what goes in and what goes out of it.

Implementation

- Create a metadata repository.
- Create a digital asset management group, which should be part of a larger group since everything is interconnected.
- Create Quality Control and Standards (include people outside of the library to develop this).
- Have a target audience.
- Need both system oriented and public oriented viewpoints
- Train staff to prepare for implementation.
- Use mapping of collections for better navigation.
- Don't reinvent the wheel. "Cherry pick" and find what really works and accept it.
- Set a main goal, and consider what statistics are helpful in achieving that goal.
- Build automation and consolidate statistics for easy retrieval.
- Need to identify a University constituency to serve.
- Have a marketing plan.

Potential Partners

- Publishers and others who can financially support the objective and the

change inherent in it

- Other institutions that have similar digital collections
- Governments
- Units Within CUL

Measures of Success

- How well we work with other institutions

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Notes from Discussion Groups: Objective 1. Develop an Integrated Framework for CUL's Digital Collections

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Group #2871

Facilitator: Marty Kurth

Note-taker: Sarah How

LMT: Karen Calhoun

Attending: Richard Entlich, Keith Jenkins, William Kehoe, Nancy McGovern, Danielle Mericle, Linda Miller, Joy Paulson, Fiona Patrick, Mary Patterson, Lydia Pettis, Marcy Rosenkrantz, David Ruddy, Enrico Silterra

The objective

- There is an excellent proposal on this objective that will be made public as soon as LMT comments are incorporated. It specifically addresses digital collections created at Cornell. However it does not exclude the OPAC, or not-born-locally digital resources, or linking to rich resources in other formats/media.
- There is interest in potential interaction with the "content management system" which is being purchased by the university. (At least 12 of the local digital collections that will be components of this integrated digital framework are delivered with web software – many of these are online exhibits which are important gates to rich library resources.)
- It may be important to distinguish "discovery" from "searching." This could be a layered approach, with targeted discovery of relevant collections preceding deep searching of individual collections.

Implementation

- Establish links between the digital collection program and the digital preservation program, and between the established collection development program for all other formats (media, film, purchased or licensed digital, and so forth) and the digital collection program – these may be addressed in the "best practices" section of the soon-to-be-released report.
- It's good to see statistics and reporting covered in "best practices."
- Overall, this report proposes a minimally intrusive framework, adapting to the existing rich resources.
- This project assumes that there is not a lot of back end work needed inside individual collections in order to make them work within an integrated framework.
- The integrated framework should be able to deal with a wide variety of digital formats, which include visual aids, digital video, and digital audio.
- There is a need to continue discussing some of the key issues of strategy and compromise, ideal framework vs. capture of opportunities, as we move from a project to program environment.
- If more work is needed, use and usability are factors to consider when assessing how much work to do in order to bring a project into the integrated framework.

- OAI compliance – how many CUL collections are in OAIster at Michigan?
- Only one existing CUL digital collection is Z39.50 compliant – SagaNet.
- It is critical that we anticipate, and provide for resources to address, the problems/research opportunities that will arise because of the complexity of developing an integrated framework for collections of mixed format and mixed granularity.

Partnerships

- Seek involvement with standards development and implementation groups and bodies
- Consider partnerships with independent commercial developers whose products CUL has purchased.
- One question must govern our work: *How should these initiatives fit into the overall framework for resource discovery for our users?*

Assessment

- A key measure of success is the viability and vitality of links to other digital resources and other library resources.
- Our statistics and measurement work must fit into the emerging national/international framework.

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1. digital collections | 2. oais | 3. information fluency | 4. marketing & outreach | 5. secure resources |
6. document delivery | 7. electronic publishing | 8. scholarly communication | 9. identify skills

- Discussion Group Notes
- [Group #2872](#)



Notes from Discussion Groups: Objective 2. Build an OAIS-Compliant System for Managing Cornell's Digital Assets.

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Group #2872

Facilitator: Jean Pajerek

Note-taker: Rich Enthlich

LMT: Tom Hickerson

Attending: Danielle Mericle, Marcy Rosenkrantz, Michael Fromerth, William Kehoe, Joy Paulson, Eileen Keating, Elaine Westbrooks, Nancy Holcomb, Mary Newhart, Nancy McGovern, Richard Lightbody, David Fielding

The objective

In collaboration with CIT and external partners, establish within three years a fully functioning, administratively supported, and sustainable OAIS-compliant repository system for managing and preserving Cornell University's digital assets, extending beyond the library to encompass university records of continuing value. This system must meet or exceed certification requirements currently being defined.

- What is OAIS?
 - Open Archival Information System
 - Originally promulgated by a committee within NASA
 - A reference model for an archival information system
 - an abstraction (i.e. does not provide implementation details)
 - divided into six major functional entity groups
 - incorporates an administrative function covering preservation planning
 - assumes use of prevailing standards, but doesn't prescribe specific ones
- How is OAIS compliance defined/determined and who certifies it?
 - There is, as yet, no formal certification process
 - OAIS committee at NASA has a group working on certification issues
 - Standards relevant to compliance are still undergoing development
 - The standards don't align perfectly and may use different terminology, etc.
 - some work is needed for all the pieces to fit together and interoperate well
- How long before the relevant standards will be in place?
 - OAIS was finalized in 2002
 - Work to formalize standards is proceeding quickly, e.g.
 - NISO z39.87 (Technical Metadata for Digital Still Images)
 - PREMIS (PREservation Metadata: Implementation Strategies)
 - see http://www.rlg.org/en/page.php?Page_ID=20462#article1 and http://www.rlg.org/en/page.php?Page_ID=20462#article2 for further information on

these

- Nevertheless, CUL is well-positioned
 - CUL staff are serving on standards committees
 - DPUBS structure already looks a lot like OAIS model
 - EATMOT (Ensuring Access to Mathematics Over Time) has a specific objective to adhere to OAIS principles
- However, some CUL assets are not well-positioned for incorporation into an OAIS compliant repository
 - Metadata deficiencies are biggest problem
 - Costs for bringing up to standard may be high
 - Whether expense is justified depends on evaluation of that asset's long-term value
 - some collections may not be worth expending the required resources to guarantee their long-term survival

Implementation

- **Ensure collaboration both within the university and beyond**
- Larger concern is probably within university
- Which assets would go in institutional repository? Where are they?
 - Involve University Archivist re: institutional records
 - Collaborate with CIT and OIT (their asset management systems may not be archival)
- What about faculty?
 - DCAPS faculty grants program is helping cultivate relationships and raise awareness
 - how do we make requirements clear to all faculty and help them implement?
 - OAIS isn't necessarily meaningful or valuable to faculty
 - depends on appropriateness of content for archival repository storage
 - faculty need to understand that non-compliant resources can't be preserved
 - major educational campaign needed—a psychological and cultural change mechanism
- There is variation in awareness of sustainability issues on campus
 - Some units already understand
 - Computer Policy and Law Program (Tracy Mitrano)
 - Registrar's Office
 - Overall university records retention policies need review
 - tradition, historical practice, and legal requirements all factor in
 - better campus-wide coordination of practices is needed
 - a records management liaison within each college would be helpful
 - could existing college-level IT people serve this role?
- Discussions need to continue within CUL
 - going forward, how does one create a sustainable digital collection?
 - better communication is needed between ongoing digital asset creation projects and those with expertise in implementing OAIS standards and requirements
 - retrospectively, what is the status and appropriateness of existing collections for sustainability?

- is metadata sufficient and in appropriate format?
- is file format appropriate?
- metadata requirements can be daunting
 - tools are needed to automate as much of this work as possible
- **Secure institutional commitment to this process that reaches the highest administrative levels of the university.**
- How should this be approached?
 - Could start trying to get high-level buy-in
 - Bidy Martin (Provost)
 - Carolyn Ainslie (VP for Planning and Budget)
 - Harold Craft (VP for Administration)
 - Could build system first and hope to bring administration along
 - we're not used to doing campus-wide lobbying
 - we need to reach out, but even getting 20 libraries aboard will be a challenge and is probably a good place to start
 - The new IT Managers group on campus would be a good forum
 - we should put on a program for this group on long-term digital asset stewardship issues
- **Work with other partners to build this system and to ensure compatibility with OAIS-compliant repositories that other institutions are creating or committed to creating (e.g., Harvard, CDL, Michigan, Texas, Library of Congress, as well as those in other countries such as the Koninklijke Bibliotheek)**
- CUL is well-connected to the OAIS movement
- EATMOT project is collaborating with Göttingen State and University Library in Germany
- There are other connections, but they were not discussed during the session
- **Recommended three-year plan:**
- **Year 1: Education, draft policy dissemination, stakeholder selection and buy-in, requirements development, request for information, partnership selection, gap analysis, cost analyses. The gap analysis will focus on five digital assets: digital image collections, Euclid journals, ArXiv pre-prints, USDA materials, and university content (material in D-Space, University Press, e-journals, university records, Web content management system).**
- What to do if your project isn't one of the five targeted for gap analysis? How do you comply?
 - Draft CUL Digital Preservation Policy Framework is now available (at <http://www.library.cornell.edu/commondepository/cul-dp-framework.pdf>)
 - articulates CUL's commitment and defines how it's to be manifested
 - serves as umbrella and general statement for project activities
 - does not provide specifics
 - EATMOT project is developing project management techniques that may be appropriate for other repository initiatives and that may help inform development work in general
- Develop a self-assessment tool so CUL projects can do pre-compliance determination

- Increase institutional CUL staff commitment to repository development and outreach
- Individual CUL digital collection projects must meet their goals and commitments, but
 - use resources in each project to contribute toward overall goal of OAIS-compliant repository
 - conduct an operational inventory to determine what aspects of each project can contribute toward the overall goal
 - provide everyone working on digital collection development a sense of stakeholder status in repository development
- To increase overall awareness and information flow
 - establish a listserv for CUL digital preservation discussion and information dissemination
 - establish a web site to document progress, reference standards and best practices, promulgate recommended policies and procedures
- **Year 2: Develop partnership agreements, develop implementation and business plans, begin development phase.**
- **Year 3: Continue and complete development.**
- **Year 4 and on: Populate and maintain digital archive.**

Potential Partners

- CIT.
- Institutions creating or committed to creating OAIS-compliant repositories.
- Publishers
- CU IT Managers Group
- CU Computer Policy and Law Program
- IT companies.
- National Library of New Zealand is partnering with Endeavor and Sun Microsystems to create a preservation program and service for New Zealand
 - Tom Hickerson will be attending meeting with them in December '04
 - we have relationships with both companies
 - part of process will be creation of RFP to see whether IT firms can provide needed functionality
 - success here could result in development of modules useful to a broad spectrum of institutions
 - we shouldn't expect ourselves to develop all the needed components
- MIT had big investment from HP research for DSpace development, a possible model for other development projects
- Help from industry will be needed, e.g. in development of repository storage technologies
- Contact with industry groups such as DAMA International (Data Management Association) may be fruitful, to nudge them towards giving higher priority to archival aspects of data management

Measures of Success

- Tasks accomplished each year.

- Becoming a certified OAIS repository system.
- We still don't know exactly what this will entail
- We are part of the process, along with others working on OAIS compliant development, defining what certification will mean
- As long as we stay engaged, we won't be left behind
- Good interim goal—achieve some functionality in each of the OAIS functional entity groups
- Interaction with other OAIS-compliant repositories.
- Develop CUL's Digital Preservation Policy Framework into a fully-realized policy

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- Discussion Group Notes
- [Group #2874](#)
- [Group #2895](#)
- [Group #2875](#)



Notes from Discussion Groups: Objective 3. Work with faculty and librarians to develop strategies to incorporate information fluency competencies into the curriculum at all levels.

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Group #2874

Facilitator: Pat Court

Note-taker: Ida Martinez

LMT: Anne Kenney

Attending: Camille Andrews, Jean Callihan, Oliver Habicht, Lance Heidig, Peter Hirtle, Julie Jones, Debra Lamb-Deans, Thomas Miller, Mary Patterson, Lois Purcell, Patrizia Sione, Pat Viele, Kizer Walker

The objective

All agreed the objective as stated was straightforward and fine.

Implementation

Discussion started right in on implementation issues. The following topics/themes emerged:

- How do we get faculty interested in information fluency (IF) and willing to collaborate? What can our "hook" be? Faculty "protect" their class time and are not very willing to give it up to IF instruction.
- The challenge: librarians need to be effective at marketing this concept – we need to convey the importance of IF to both faculty AND students. Many noted it was important to have the students understand the objective, as well. If part of the demand for IF was student-driven, faculty might be more willing to collaborate.
- Get away from jargon that only we understand. Don't use the term "information fluency" with faculty or students. Apply the concepts of IF to goals faculty have for their students, such as developing critical analysis/ thinking skills.
- Suggestions were made to develop a pilot program of curriculum integrated IF with select faculty members; show how well it works; rely on that faculty member to spread the word to others in department meetings. Important to build a foundation of success on which to build.
- Quite a bit of discussion centered around Middle State Standards – IF is increasingly being required for accreditation at all levels. Perhaps we can use these requirements to our advantage. Tell departments/faculty, "It's required."
- We need to look for IF inclusion in other curriculum standards as well, since Law does not look to Middle State Standards for guidance.
- CUL Instruction Division is looking to Middle State Standards to see how we "measure up." If it turns out we're doing well, the group agreed that

there is always room for improvement. Also, it was agreed that there are evident gaps in Cornell students' IF competencies. There will always be a need to develop IF.

- A focus on standardization could compromise the depth, complexity, and diversity of what we do at Cornell. Group stressed that IF is (should be) discipline-based/customized, not standardized or made inflexible.
- Some debate over whether we should be upfront with faculty and students about our IF goals or whether we should be more surreptitious – that is, make it seamless and unobtrusive. Some called for having frank discussions with faculty and students about IF and lifelong learning goals. Others called for making students lifelong learners and information fluent without them realizing that we are implementing a program of goals, objectives, and measurable outcomes.
- Regarding the more "stealth" approach – a group member suggested that we should encourage ALA, SLA, AALL & other library associations to coordinate to pick librarian stars to speak at professional conferences on where their university's professors stand on this issue. Are they informed? Are they receptive but not informed? Etc. This would provide a captive audience with the presumption that the speaker (librarian) has been selected by peers to speak on this topic.
- Group called for the inclusion of administrators in this effort. College, departmental, and even the President's Office need to help us sell and implement IF goals.
- Discussion of this goal's relation to other objectives:
- Concern about definitions of IF. Too broad? What does a psychology student need to know vs. a law student, e.g. Definitions of IF for each are going to differ. How do we all agree on definitions? What are the odds we will come to a consensus? What do others outside of Cornell (outside librarianship) mean by IF?
- Should we engage faculty on a definitional level or should we, as librarians, define IF for ourselves and then engage faculty on an implementation level?
- In reference to the first bullet point under "Implementation" on the CUL Priority Objectives for #3: It was pointed out that there has been one IRPC retreat on IF with a national speaker and there will be another one in the Spring of 2005 – again, with plans for a guest speakers.

Potential Partners

- Knight Writing Center – especially in the early phases. We have worked with KWC (Freshman Writing Seminar & Writing Workshops) a long time. IF goals will evolve our role from course-related instruction to course-integrated instruction. Writing in the Majors courses for juniors and seniors have a strong research component. Look for collaboration there.
- Center for Learning & Teaching
- Learning Strategies Center – teach a series of 1-credit study skills classes. Is there opportunity there?
- Academic Technology Center – we need to integrate more technology into our teaching to hook students.
- One group member talked about CIT initiatives we could emulate. (See Supplemental information sent via e-mail to note-taker for inclusion).
- Some discussion about whether or not we could withhold something from students (access to the OPAC) until they pass a "test" of basic IF skills. Something like this is happening in California. Most agreed it would not be realistic at Cornell.
- Graduate School

Measures of Success

- Faculty can report if students are using better sources
- Knight Writing Center has something called Writing Across the Curriculum. Can we collaborate there to find some ways to assess IF goals & objectives?
- All agreed that assessment of learning – especially measurable outcomes – is difficult and we need to find ways to determine if our efforts are effective.

Supplemental information sent via e-mail to note-taker for inclusion:

[1] This idea relates to both "Implementation" and "Partners". There may be analogs on campus that we may wish to emulate (or simply integrate into) to enhance information fluency on campus ... [such as] CIT's Travelers of the Electronic Highway (TEH), historically "required" of all first-year students and available to grad students. An effort is now underway to make this available (required?) to staff and faculty.

[2] SkillSoft is selected by, I believe, HR staff. Consider having some Library staff review courses from the full course offerings for any information fluency-related topics, and if there are any, be able to influence those courses getting "selected" by Cornell. (We get to choose up to 800 titles under a SUNY contract.)

[3] Probably second-nature to all Librarians, but during the conversation we had yesterday, I notice a distinction between teaching resource discovery versus teaching searching (with a given searching environment). Until we get 100% convergence, this distinction, so natural to Librarians, may need to be emphasized to those we teach. What Librarian doesn't use Google to find answers? For too many patrons, it stops at that. For a librarian, that is just the tip of the iceberg if an acceptable answer is not found! For a patron, therefore, they may therefore only think to learn how to make Google work better for them, which although a valuable skill in itself, is not complete.

[4] I found this article ... and thought it pertained to the outreach we strive for:

<http://www.infotoday.com/searcher/nov03/price.shtml>

Eight Starting Points

Here are eight things I think all of us, in an organized way, must begin to work to achieve. This is not a job for a single person or a single library group, but for all of us.

1. Reach out to people who haven't been in a library in many years. Point out that library services go way beyond the four walls of the library building.
2. Develop personal relationships with users. In the same way bankers used to know their customers' needs, let people know you are "their" information go-to person.
3. Not only tell people we're here, but why we're here and precisely what we offer. The phrase "save them time" is a good place to begin.
4. Court people in gatekeeper roles like journalists and teachers and demonstrate what we can offer. In addition, let them know that you're always ready to assist them. Helping them one or two times can do wonders.
5. Publicize librarian-created services, for example, general Web directories like the Librarians' Index to the Internet, Infomine, and the Resource Discovery

Network. Explain how important the editors of these services consider the quality of information.

6. Remind people that passing up the library might mean they end up paying for material the library offers them for free.

7. Clearly illustrate and demonstrate Google's limitations but more importantly, demonstrate how you and your library can solve these problems.

8. Remind people that a link to a possible answer is still not an answer.

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Notes from Discussion Groups: Objective 3. Work with faculty and librarians to develop strategies to incorporate information fluency competencies into the curriculum at all levels.

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Group #2895

Facilitator: Linda Bryan
Note-taker: Beth Katzoff
LMT: Lee Cartmill

Attending: Eric Acree, Lynn Brown, Katherine Chiang, Joel Copenhagen, Janie Harris, Fred Kotas, Gordon Law, Adnan Malik, Michelle Paolillo, Lynn Thitchener, Wanda Wawro, Casey Westerman

The objective

- We began by addressing the meaning of information fluency.
- If we can't define it ourselves, how do we define it to others?
- We need a way to define it that doesn't resort to "librarian jargon," a way that is widely understood and perhaps uses better terminology to get the meaning across.
- Information fluency includes print collections and not just electronic resources. We need to attract people to books, whether we do this through cafés or better chairs, we don't want to focus exclusively on electronic information.
- Perhaps information fluency is like Justice Potter Stewart's definition of obscenity – "I know it when I see it."
- When we think about information fluency, we should understand the structure of literature – while graduate students understand the process of literary production, undergraduates do not.
- Print resources are better understood than e-resources. Do new resources like e-resources bring their own requirements and new challenges that require redefinition of information fluency or are we just training students in the use of different resources, as we have always done?
- We need to consider the method of delivery – search engines as an example. With search engines, there are commercial interests that influence the hits we get. As a library, we need to be aware of this and communicate to those doing research that there are commercial interests.
- We should keep in mind the faculty concern with "pre-packaged" e-resources, that there are negative aspects to e-resources, and that the role of the library is to dig through the slick form of advertising that can come out of e-resources.
- The car metaphor – perhaps we should consider information fluency as a need to understand what is inside or under the car hood? Or, do we feel that we are indeed getting under the hood at all? We should consider how the kinds of questions we are asked make a difference. For example, those researching philosophy and ethics may want to get under the hood (presumably graduate students), whereas undergraduates may have simple questions that don't require detail. Perhaps we drive many cars and we want to ensure that we are getting value for our purchase.

We should also keep in mind that in partnership with patrons, we do not make assumptions about what is under the hood.

Implementation

- Regarding number 2, "Engage the faculty to define information fluency learning objectives and to incorporate the objectives into the curriculum," we do not want to define FOR faculty what those objectives are, but instead, we should be working WITH faculty.
- Back to the car metaphor - we already teach what is "under the hood." The problem is getting the patrons to care and getting faculty interested.
- As for getting nationally recognized speakers with expertise in information fluency to provide guidance - who are these people? IRPC Retreat's Nancy Becker as one example
- We need to identify the models already in existence. Michael Engle's presentation at the IRPC Retreat as an excellent model.
- Implementing at the course level - The classroom as one way to convey what we do. Example: course on Japanese bibliography and research methodology. "research methodology" as a preferred term
- Implementing through the Library Gateway - Do we need to build levels into the current Library Gateway? Or, perhaps design an Undergraduate Gateway that would involve tutorials for patrons? We need to recognize that people learn at different levels.
- We need to "brand" what we do - identify and sell the product (our services)
- Create a library publication for students
- There is a tension between convenience and engaged understanding. The convenience of Google type searching fosters a certain passivity - "you give me the answer" vs. a more active approach that involves figuring out how to do the searching. We need to help patrons develop a more active approach to the process that may be less convenient but will have more meaningful results.

Potential partners

- Faculty: We should have an Open House Faculty Event with food and a dynamic speaker to get the conversation going
- School librarians/teacher librarians: they have been doing this work for years
- Each other - forums across communities, focus on a topic at a forum
- Teaching Assistants
- Center for Learning and Teaching - we need to be more involved with them
- CIT
- Student Structures (dormitories)
- Student Clubs - Examples: Debate Club and Model U.N.
- Student Advisory Board - we haven't effectively used this resource
- Student Workers in the Library
- We should relate our work to the 2nd of President Lehman's new initiatives - to build relationships
- We should consider our work as "consciousness-raising" to help develop skill sets. How do we get people to be active on this issue? We recognize that everyone should have this competency and should be involved.

Measures of success: How do we assess the effectiveness?

- Are we talking about an audit of what is available or assessing the outcome?
- If we give information fluency a more user-friendly name, perhaps that would help?
- So much of our communication is not represented. What about our work that is not labeled on web pages or the Library Gateway? Information fluency is the entire package of our work.
- Tests – typical measure, but not sure how to do this effectively
- Library User Statistics – quantitative not qualitative, do we really know what people are doing in the library?
- E-resource Usage - database statistics, how are people searching? What are the types of searches that are being done over the course of a semester?
- Students all have computers now
- Instruction – on a micro-level, can give quizzes in class to see if they are “fluent”
- Student perception – are they more efficient?
- Feedback from alumni
- Continue partnerships with faculty and have students fill out surveys in Bibliographic Instruction classes – surveys in course evaluations
- Building and maintaining relationships with individual faculty is the key to success on number 3.
- We are still at the “story level” – not necessarily determining success in a certain way.
- It is much easier to measure and increase our efforts toward information fluency than it is to say definitively what changes are the results of those efforts.

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Notes from Discussion Groups: Objective 3. Work with faculty and librarians to develop strategies to incorporate information fluency competencies into the curriculum at all levels.

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Group #2875

Facilitator: Mihoko Hosoi

Note-taker: Zoe Stewart-Marshall

LMT: Anne Kenney

Attending: Kornelia Tancheva, Fred Muratori, Anthony Cosgrave, Stuart Basefsky, Paul McMillin, Donal Schnedeker, Teresa Mei, Leah Solla, LeRoy LaFleur, Miriam Scheraga, Ross Atkinson

The objective

- There were questions related to whether CUL has an instruction "program" (as noted in the description of the objective) and/or whether it needs one beyond the unit based activities that are currently taking place.
- What is the goal of the objective – a quantitative increase in instruction activities or a better definition of competencies and recognition of competencies by both librarians and faculty?

Implementation

- There was discussion on the subject of whether or not there needed to be a working group. Many participants felt that there were already defined standards and that CUL staff were aware of them (SAILS project). It was pointed out that existing programs already take discipline specific concerns into account when implementing programs.
- We need better marketing – reaching new faculty as they arrive and following up with existing faculty on an ongoing basis, even if they were not previously interested. There is a need to educate the faculty on the benefits of information fluency and there needs to be buy-in at the administrative level that faculty time spent on information fluency is acceptable. The librarians' role in these efforts needs to be made visible. Possibly establish a faculty relationship program that could keep track of existing conflicts, possibly identify areas of overlap and record successes and failures.
- The way to reach the students most effectively is through the faculty – task oriented and re-enforcement by the faculty of the perceived value. We also need to "re-position the product" to emphasize what benefits, such as enhancing decision making abilities, can be gained.
- Work with faculty to set up information fluency requirements as pre-requisites for admission to certain courses.
- Realize that in order to be effective we need to make instruction relevant to the students – relating it to what they are already familiar with

(google scholar) and tying it directly to concrete tasks or projects.

- Build upon the existing programs that emphasize writing components or have research components – ex. Knight writing program as well as others
- Take advantage of some of the existing synergies of interaction with faculty in related areas, such as collection development, etc. and build upon any interaction “making the faculty aware of the instructional services the Library offers, even though the librarian involved may be an administrator, a selector, or someone not directly involved in providing instruction as a major part of his or her job”. Be willing to go to “their space”.
- Working with departments to set up web pages or collections of links to materials that are tailored to their discipline specific needs.
- Provide information instruction for the faculty in a variety of formats/venues.
- Have instruction programs which are focused internally – to improve planning and presentation skills as well as sharing implemented practices and updating skills.

Potential Partners

- A significant amount of discussion focused on the point that the faculty are the primary partners – if the faculty were not actively engaged, then defining information fluency desired outcomes was not productive. Some discussion centered on the increased effectiveness of one-on-one work with faculty over other methods.
- Faculty curriculum committees
- Committees reviewing proposals for new courses
- Accreditation teams
- Professional associations – get them to endorse information fluency standards/requirements
- Other campus organizations: student clubs, student orientation committee, other resource centers on campus, scholarship programs (presidential scholars)
- Untapped staff resources within CUL who are not currently directly involved in instruction programs but might be interested – ex. Technical service librarians.
- Partner with people who have experience marketing to better sell the product and the services.

Measures of Success

- Incorporate assessment retreat of IRPC.
- Formal instructional classes do contain a feedback or assessment portion (example of ILR classes) just as faculty are assessed and should be considered in the measures of success.

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• Discussion Group Notes

• [Group #2876](#)

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Notes from Discussion Groups: Objective 4. Effectively market the library's products and services and expand outreach and communication to new and underrepresented constituencies.

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Group #2876

Facilitator: Terry Kristensen

Note-taker: Cecilia Sercan

LMT: Jean Poland

Attending: Carmen Blankinship, Martha Crowe, Carla DeMello, Elaine Engst, Debra Federation, Eveline Ferretti, Angela Horne, Anna Korhonen, Susan LaCette, Paulette Manos, Susette Newberry, Jill Powell, Deborah Schmidle, Howard Raskin, Jacalyn Spoon, Kornelia Tancheva

The objective

- The participants each responded to the question re: clarity of the goal. Most found the goal clear.
- It was suggested that the goal be amended to include **identify needs**. Also that a mention be made with regard to the uniqueness of the individual libraries that compose the Library.
- Participants agreed that a great deal of what this goal aspires to is done right now.

Implementation

- There was a concern about the order of the list. It was decided that it was simply a list, and not in prioritized order. Prioritizing seen as important, with perhaps the outreach coordinator and the director for communications and media relations being initial steps to be taken before implementation could be initiated.

Some additions and comments:

- Identify our audience; change this to the plural—audiences; change to stake-holders, as well as users (current and potential—re-examine periodically)
- Create a matrix; different products for different users; cannot do everything for everyone
- Identify users. Increasing number of K-12 being brought to Library
- Promotion within the library and conduct needs assessment
- Identify the purposes and goals.
- Use library statistics. Expand their use to identify the potential partners.
- Value for University—role of the land grant colleges, globalization and

service

Potential partners:

Many suggestions in addition to the ones listed.

- Tompkins County Public Library
- SCRLC
- Johnson Museum
- Discovery Trail (part of History Center)
- Cooperative Extension
- Kendall
- Sciencenter
- Cayuga Nature Center
- Admissions Office
- International Students Office
- Provost for Outreach
- CU Library design group working with/or not the CU web-presence group

Measures of success:

- Cost recovery
- Number of press releases (mentions in newspaper)
- Training, support, guidance
- Broader use of Events calendar
- Recognition of audience
- Office of Community Relations

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Notes from Discussion Groups: Objective 4. Effectively market the library's products and services and expand outreach and communication to new and underrepresented constituencies.

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Group #2877

Facilitator: Lynn Brown

Note-taker: Deb Lamb-Deans

LMT: Jean Poland

Attending: Camille Andrews, Elizabeth Fontana, Janie Harris, Lance Heidig, Nan Hyland, Julie Jones, Sarah Keen, Zsuzsa Koltay, Xin Li, Jim Morris-Knowler, Wanda Wawro,

The objective

- Discussion about the term "marketing" – did this mean a shift in our thinking, moving away from merely publicizing?
- Is the emphasis on marketing only to under-represented or does it include existing audience(s). We need to continue to market to our current audience(s) as well as to new or newly identified audience(s)
- What are we marketing? What do new or non-users want from us? Marketing should also include marketing "resources" including human resources
- How do we know what anyone really wants?
- Need to know what our products are before we can market them
- We constantly change and will not look the same in years to come – we need to be prepared to change so we have a hand in our destiny
- There was some concern about marketing too many things/services and not being able to support it all. We should know the product before we market
- Discussion about what "expanding services" meant. One suggestion was that it meant "expanding use of library services through communications" or "expanding communications". We have many services that people don't seem to know about.

Implementation

- Marketing efforts should be built into any new project/product and not thought of at the last moment. Also, it should include continuing efforts to support/maintain any efforts.
- Public service people should also be involved in any new project/product to provide continuing support and input into user needs. Also can then plan to help continue to support it.
- Each unit has a certain level of work and time already committed. How do we handle it when requests come from LMT and/or at the last

moment? Is it realistic to have people just drop what they are doing to pick up someone else's priority? How can we accommodate and plan for flexibility.

- We have more than one audience. We need to talk to audiences and bring back the results in a more systematic manner. We need to study our audience and see if we already have what they want/need. We should see if we effectively communicate now.
- What will the new communications and media relations person do? Will they only do system-wide things or would they be available to help individual units? It is good to have a professional like this. We know how to be librarians but are not trained as marketing experts. But will this new person understand what we do? We are in a transitional period and need to educate ourselves about things like marketing.
- Can we be trained to market ourselves? What skill set would be necessary? Does this connect to objective 9 (Identify the skills and resources needed for library innovation and develop new competencies by training and recruiting) and should we be using this criteria when looking for new hires?
- There is a danger of turning ourselves into a commodity. We are not all the same across the board and is there a danger of setting up expectations that we are all alike? We should be promoting our values to the user.
- "Marketing" as a term has hot button value and brings to mind corporate issues. It is more R&D than PR.
- What do we do after we identify the "gaps." When and how do we determine priorities and who decides if we really want to fill all of the gaps.
- Marketing is a two-way effort --this is what we have (advertising) and finding out what users want (market research).
- Do we have a public perception and public relations problem – incident of CUL being placed under "collections" on the CU web page.

Partners

- When talking about other institutions, do their programs really have relevance to what we do?
- We need to partner with ourselves within CUL.
- Do we let our internal structure dictate how we publicize ourselves? Our audience is not concerned with that structure, only what we can do for them.
- We are too library-centric in our outreach efforts, which puts us at a disadvantage. We need to use their language to market effectively. "Elevator talk" – we need to be able to articulate why the library is important in two sentences.
- Can we have one place where all of our services are gathered for the user to find? Seamless integrated context for their management ease.
- What is our identity? Do we know who we are? Do we agree about who we are? Such things as visual connections on web pages, how we organize things and how we look similar.
- How do we represent ourselves in an inter-disciplinary context?
- Can we use local resources, such as JGSM students, who could give us assistance in these areas and also give us user feedback?

Measures of Success

- Marketing never ends, it is a constant effort. One quarter of our users change on a yearly basis. Need to continue marketing to reach everyone.

- We don't have the appropriate tools to measure user satisfaction, relying on anecdotal evidence. User studies are important and need to be done longitudinally so we have comparison data. Also need to talk to users during interface/resource design. Things like focus groups, statistics, surveys are necessary.
- Do marketing people have their own tools to measure satisfaction?
- Communication Strategies may be an excellent resource to assist us in this effort.
- Building in ongoing maintenance and not just focus on roll out.
- How do we publicize and advertise without clutter?
- We need definition of how many roles libraries do – museum, café, event venue, etc.

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Priority Objectives 2005-2006



Cornell University
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1. digital collections | 2. oais | 3. information fluency | 4. marketing & outreach | 5. secure resources |
6. document delivery | 7. electronic publishing | 8. scholarly communication | 9. identify skills

- Discussion Group Notes
- [Group #2879](#)



Notes from Discussion Groups: Objective 5. Secure the resources to meet CUL's goals and objectives.

[Print This Page](#)

Group #2879

Facilitator: Gordon Law

Note-taker: Anna Korhonen

LMT: Sarah Thomas

Attending: Eric Acree, Michael Cook, David Corson, Cecilia Sercan, Patrick Stevens

The objective

- The discussion began by clarifying resources needed to meet goals and priorities. The resources can be divided
 - to sustain operations at longer haul
 - to use for one-time big ticket items (like Olin/Uris renovation) that cannot be funded by discretionary funds.
- The goal is to find "spendable", unrestricted money right now but we should not forget that we need funds also in the long term, 5-10 years from now.

Implementation

- Next campaign is program and theme oriented; to this end
 - library could partner with faculty
 - solicit faculty members for collections in special themes
 - faculty may point access to donors interested in certain programs/ themes
 - partnering with faculty, sign-up with deans may result in donations where benefits can be shared with the school and the library
 - library can go independently and be successful on individual donor level, or partner with the university
 - library is not to compete with CU campaign donors but if CU seeks donors in their 60's & 70's, could library target donors in their 40's?
- Find and target new donor groups
 - undergraduates: future leaders but we have not addressed them as future donors
 - build "ownership" early on in students
 - library student workers with good past experiences – track them down later in alumni events and cultivate the library connection
 - parents of undergraduates
 - graduate students to expand the base of alumni who will give later (long-term)
 - in addition to emeritus faculty, include current faculty as well
- What is it that the donor wants?
 - tangible connection between the donor and CU
 - recognizable connection
 - recognition ties in

- association with Cornell brand, especially for alumni
- astute targeting necessary in alumni to tie the recognition to tangible memory
- visible recognition: name tied to buildings or equipment
- ¾ restricted money, tied to donors' interests and targeted to physical objects – could we target that to digital objects?
- cultivation of long-time relations – how to keep the relation up for delivery in 5-10 years?
- balance between short-term and long-term needs and giving
- concern: not to sell yourself too cheaply – e.g. naming problems later
- Do research on what motivates foundations to give
 - special themes like 'open source', 'open courseware'
 - study their funding cycles to see where their interests have been
 - analyze their catalogs
 - do they promote/support change or sustain traditional things and tie the library to these
 - search the Boards for Cornell alumni; what are their interests; has faculty worked with any of them
 - endorsements or trust built over time facilitate relationships
- Identify cycles and tie them to giving
 - economy (bear or bull market)
 - interests
 - projects or combinations of projects
- To what extent is the fundraising quantitative or can we find creative ideas to approach donors? Access to donors is a key.
- Seed money & increased time needed for fundraising.

Potential Partners

- Colleges and units, funds to improve programs
- Alumni
- Current and emeritus faculty
- Future leaders – current undergraduates and graduate students, student workers
- University Development Office (contacts, gatekeepers)

Measure of Success

- Increased right kind of funding (unrestricted)
- Short-term funds rather than commitments – although needs ongoing
- New donors, even small donations that can grow later
- Outreach to new audiences and partners

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• Discussion Group Notes

• [Group #2880](#)

• [Group #2881](#)



Notes from Discussion Groups: Objective 6. Expand and coordinate document delivery services to facilitate use of both digital and analog information.

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Group #2880

Facilitator: Kathy Chiang

Note-taker: Mary Patterson

LMT: Anne Kenney

Attending: Carmen Blankinship, Julie Copenhagen, Susan Greaves, Eileen Keating, Jesse Koennecke, Terry Kristensen, Joanne Leary, Patricia Schafer, Donald Schnedeker, Lynn Thitchener, Sharon Wargo, Mary Wesche

The objective and its Implementation

- Identify users to be served
- Increase programming and staff support
- Determine the easiest interface for user
 - one page entry
 - no need to supply credit card/payment
 - GET IT button
- Monitor usage, adjust fee as necessary
- Do we limit this to current Cornell community, or, do we expand this out to alumni?
 - Suggest that CUL look at use of commercial services to acquire copy for Alumni and Friends; that may be cheaper than getting through ILL.
 - What is a Cornell person? How is the person identified, through Voyager, through other university personnel databases.
 - What other delivery services, and document delivery services exist now:
 - Law Library – free document delivery to faculty, within 2 hrs.
 - JGSM – free document delivery to faculty and staff in building
- What is our vision of simplification? Challenges and problems?
 - There is no GET IT button at present.
 - We have multiple services, listed on multiple pages; users have to open each one, read it and decide which to use.
 - It is not clear that most pages are to be used to get what CUL DOES NOT OWN.
- A GET IT button would simplify requests for the user. They would not have to decide if we own it, don't own it, or they don't know. All the searching would be done behind the scenes. From the perspective of the user, no worry about choices—just plug in the citation to the form and the library (or, software) directs the request to the proper path.
- At CUL every request gets searched. We may not want to deal with the staffing cost implications of a GET IT button at this time.
- If there is a charge, it is important that the user be made aware of that at the start of the process.

- Currently, we require multiple different registrations: ILL, Borrow Direct, MyDocument Delivery
- We need a system /software that can identify different kinds of requests.
- It is important for users to know at the beginning when (how soon) they can expect an item. For Borrow Direct, this is happening now with the email that is generated by the system.
- Discussion about fee/free structure:
 - Time is a cost for the user as well as the library. User needs to know what to expect. Example at JGSM: If user requests 1 article, turnaround time is 24-48 hours. But if user requests 15 articles, the turnaround time changes to 1-2 weeks. No staff has been added to operate the new services
 - Should the system be: Full charge? Nominal charge? Cost recovery? Free?
 - Point: Users who walk into the library and make a photocopy, pay with their time and coin.
 - Re: ILL copy free, Annex copy free, My Document Delivery a \$\$ charge. One rationale for our present charge vs. free is ease/difficulty of access. If something is at the Engineering Library, it is much easier for the patron to get it, than from the Annex or from U. of Minnesota
 - Suggest that we analyze the usage statistics of MyDocument Delivery after 6 months of service using the law of supply and demand—deciding to remove the charge, lower it, or raise it.
 - From an overall perspective of “for the good of the University” and “using its most expensive resources (people) wisely, we suggest that since the university is paying for both faculty time and student time, it would serve the university’s obligation to efficiently shepherd its resources to use student time (money) to make “copies” rather than faculty time (money).
 - The library staff has extensive expertise in certain areas—we are best at searching the library catalog. By providing this service to faculty and promoting our resources to faculty, we achieve a “teaching moment”.
 - If we want to maintain the “fee” we need to find a way around the necessity of putting in a credit card number into each and every request. This is tiresome and cumbersome to faculty. One system that was used in a library for another service is a debit account, where faculty credited the account with a sum once a year, and fees were deducted from that account as the services were provided.
 - Suggest that we communicate with the different departments and colleges about best use of their faculty “time” resources and make a plug for some support from them in terms of student job time dollars.
 - Another factor to be considered in the fee vs. free discussion, is that any fee, even just \$1, serves to clarify the “real need” of the user. University of Wisconsin had offered free document delivery, then changed to a \$1 charge, and the volume of requests dropped 60%. Universities that provided free photocopying found the same drop in volume occurred when a charge was instituted.
- We need to itemize the hurdles that users encounter when making requests.
- Carefully evaluate the changes in procedures that will enlarge the library staff workload.
- A standardization idea: make one (and only one) Cornell ID necessary to use services, currently there is net ID for MyDocument Delivery and

- Cornell unique number ID for Interlibrary Loan. We need to partner with CIT and the University personnel database to make this "one ID" happen.
- We need more overarching coordination and structure within the various CUL service providers, to decide how to sort out and redistribute requests from one input source, the GET IT button.
 - We need to change our front page presentation to users. When they ask for an item, the front end should take them through pertinent questions/pathways: Do you need a book—go here. Do you need a photocopy—go here. Do you need an interlibrary loan—go here. This could be done with a web page.
 - Whether or not we charge a fee, these support needs (staffing, web page design, etc.) need to be sent up to CUL administration before the service is out there and available, rather than the staff having to "wing it".
 - An important issue--digitization of unique items in collection of RMC, where preservation for future is important.
 - Should we keep (and, do we have the right to keep) items we have scanned for users? Issues:
 - Copyright
 - Quality of scanning (quality tends to be low if scanning is rush-rush for a user)
 - How do we organize such an electronic file; metadata (therefore, staff time) is needed to be able to find an item again.
 - How do we make these electronic files visible to the public?
 - Where do we record it—in the library catalog?
 - We currently use ILL requests to inform Collection Development staff of users research needs. At this time, rather than spending to organize scanned images of miscellaneous journal articles, we should partner with providers such as JSTOR for access to electronic backfiles.
 - If we own the material, such as scanned images created by RMC, then the case is very strong for archiving, cataloging, etc.
 - When copyright is no longer an issue, such as in the case of 19th century books, we need to consider digitizing such books rather than lending the physical item through Interlibrary loan. Digitization protects valuable physical items from damage and from theft. The Hotel School Library compared the items in its cookbook collection with OP dealers prices, and plans to digitize those of high market value, to deal with the issue of theft.

Potential Partners

- CIT
- Bursar
- University accounting
- Innovative Interfaces,
- Partners outside Cornell: University of Rochester, invite them to CUL to share their ideas and experiences.
- Note: We are late to this market.

Measures of Success

- Can we measure number of requests over time, as a percentage of user population?
- What does success mean? Need quantity and quality measures.
- We have a conflict now. In order to reduce costs, we push the work onto

the user. We need to find a balance.

- Politically, when librarians go to their deans to extol new services, that doesn't carry much weight, but when the deans go to the president and tell him that this service is wonderful, this is meaningful.
- We can monitor costs and compare our costs with that of other universities.
- Success is:
 - The user not having to identify the source of what is needed
 - User can copy and paste request in one box
 - Payment route is easy
 - Registration of user is easy and uniform
 - Get rid of multiple user interfaces
 - Use statistical picture of fill rates and turnaround time to evaluate success
- We do need to acknowledge our progress and success with what we have accomplished so far. Users are extremely pleased with Borrow Direct.

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• Discussion Group Notes

• [Group #2880](#)

• [Group #2881](#)



Notes from Discussion Groups: Objective 6. Expand and coordinate document delivery services to facilitate use of both digital and analog information.

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Group #2881

Facilitator: Nan Hyland

Note-taker: Pat Viele

LMT: Anne Kenney, Sarah Thomas

Attending: Janet Gillespie, Peter Hoyt, Susan LaCette, Richard Lightbody

- the current system is too complicated and too labor intensive
- an interim fix (or quick win) might be help screen or comparison chart to help patrons select the right option among ILS, Borrow Direct, MyDocument Delivery, etc.
- another suggestion for an interim fix would be a "wizard" to help patrons choose
- borrow direct is quick and costs the library less than traditional ILS
- one cannot renew an item from borrow direct
- we already offer library-to-library delivery
- library-to-office delivery will start soon
- The Law Library offers a Book and Copy Service for about 50 faculty members. If one submits a copy or loan request by noon, delivery is guaranteed by 5PM that same day. It is free, rather than fee based. The library employees students to run this service. If it is necessary to go to another library to copy an article, the student uses a pseudo-patron copy card. The program currently runs M-F. There has not been a cost/benefit analysis. JGSM offers a similar service.
- a service that might be added is public scanners so that a person could scan an article and email it to himself
- using Amazon.com to purchase books for people who request them and adding the item to the collection later was mentioned as good PR (ala Perdue system)
- it might help to develop a flow chart of the process (a decision tree?) to help patrons decide which service to use
- invest in making it easier for patrons to find materials in the on-line catalog
- googleize the catalog
- capture and analyze the "inappropriate" ILS requests (in this case, requests for materials that CUL owns)
- tie in Borrow Direct to Voyager -- the BD option would pop up if the item is not available at CUL
- form a task force including programmers, librarians, users (to gain their reactions), and technical people to help design the interface
- potential partners include Google Scholar, Amazon, and CU Press
- e-Reserves of CU Press books was suggested
- ways to assess progress include more circulating materials, lack of complaints, and possibly a cost/benefit analysis would show benefits

Additional comments provided after the meeting:

- Would love to see cut and paste as an option for ILS and Annex Request forms as it is for the reserve form. Many patrons have expressed dissatisfaction with the ILS and the Annex request forms.
- At the teleconference on The Importance of Teaching (Fri. Nov. 19th), two ways to help patrons learn systems were mentioned: webquest and Low Threshold Applications. Perhaps one of those systems could be adapted to our use to help patrons sift through the complex systems for delivering materials.
- The Teaching, Learning and Technology Group offers free resources.
<http://www.tltgroup.org/>

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• Discussion Group Notes

• [Group #2882](#)

• [Group #2883](#)



Notes from Discussion Groups: Objective 7. Operate an electronic publishing program capable of systematic production and distribution of journals, monographs, and multimedia compositions and foster alternatives to conventional publishing .



Group #2882

Facilitator: Bob Kibbe

Note-taker: Thad Dickinson

LMT: Jean Poland, Sarah Thomas

Attending: Teresa Ehling, Debra Federation, David Fielding, Michael Fromerth, Diane Hillman, Nancy Holcomb, Sarah How, Keith Jenkins, George Kozak, LeRoy LaFleur, Xin Lin, Fiona Patrick, Steven Rockey, Kizer Walker, Scott Wicks

The objective

- Hope to expand on the Euclid model
- Make DPubs an open source system
- Tools that support open access
- Attain sustainability

Discussion:

- Sustainability
 - What about experiments in publishing that are not in the sciences? Will there be more incorporation of the visual or the humanities?
 - I don't see the non-sciences folded into this objective
 - Yes, it is possible [to incorporate the subjects other than the sciences] and hopefully we will accommodate a variety of subject types.
 - Technology exists to make it feasible to bring in other fields.
 - Interested in brand new content-types; don't think we need to be competing with other publishers
- Lab of Ornithology is missing from this list: learning from what they are doing would be helpful.
- We need to convince people that there is something positive to gain by participating (DSpace being an example)
 - Sustainability will require larger buy-in by the academic community
- There is a problem of getting decent metadata and finding ways of evaluating and managing metadata is critical.
- Considering all that we are doing now, what are our weaknesses? What problems have to be overcome to make it possible?
 - We must market more, often to publishers as well as to peers
 - We need generalized support without having to outsource
- We need to dovetail our initial initiatives; we are trying to reach out in many directions and we need to coordinate the outreach; need more carrots, such as faculty grants, to bring others in with us.

- We need to think on a more community-based level, with Cornell being the community; first, build a community that will want to use it.
- We need to develop a reputation, a brand, a way of getting people interested
 - An effort needs to be made to give ourselves some prestige [in this area]
 - First movement advantage is critical.
- It's important to respond to a particular subject need: ArXiv didn't create the community, the community created ArXiv.
- If you rely on submitters to provide the metadata, there will be inconsistencies.
- Why are we not collaborating with the Johnson School of Management students and faculty for marketing?
 - They could help with brand management and marketing
 - Free and better than hiring consultant

Implementation

- Is this a move from projects to a program? How do you as an institution move from projects to program?
- If we're serious [about a program] we need to look at all projects and smooth those out; right now there are too many pieces outside the box to market effectively.
- This is an opportunity to de-construct scholarly publishing and other existing models.
- We need to describe this in a clear enough way so that people on all levels have something to hold on to.
- There must be open-responsiveness.
- We should identify what we do really well that publishers aren't doing, and explain that.
- There needs to be a mechanism for us to harvest what we are doing now; cherry picking.
- There should be a "Cornell container" to "put" projects into.
 - There needs to be functional groups available to determine what, if anything, the projects have in common
- Must ask ourselves, "Are we meeting the need?" What do faculty really want? Opportunities exist for educating faculty to get them actually thinking about their scholarly output.
- We could use the *Indonesia* project as an example of collaboration.
- Perhaps we should be building "referitories" instead of repositories.

Potential partners

- We are in competition with HighWire and Ingenta
- Perhaps we should work on a model of "cooperation" instead of competition.
- CDL (California Digital Library), Columbia, and Michigan all have digital initiatives

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• [Group #2882](#)

• [Group #2883](#)



Notes from Discussion Groups: Objective 7. Operate an electronic publishing program capable of systematic production and distribution of journals, monographs, and multimedia compositions and foster alternatives to conventional publishing .

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Group #2883

Facilitator: Joy Paulson

Note-taker: Beth Katzoff

LMT: Jean Poland

Attending: Adam Chandler, Paul Houle, Elizabeth Perenyi, David Ruddy, Patrick Stevens, Elizabeth Stewart-Marshall, Mary Wesche

The objective

- Question – How does this session interact with session 1? (Develop an integrated framework for CUL's digital collections). Response- They do not necessarily go together, but sessions 1, 2, and 7 are related.
- An important part of this session is the issue of publishing and the Library's work in becoming a publisher of journals and books.
- Issues to consider – competition, building an infrastructure, we know how to purchase, but do we know how to publish?
- The audience in this session is different from the others
- Scholarly publishers need to maintain the credibility of publishing – through referrals and reviews
- There is a question about the statement itself and the issue of alternatives to conventional publishing – why are we at this point? Response – in part we have found ourselves here as a response to Elsevier. Perhaps the question is now that we find ourselves here, do we continue? We are moving away from particular publishers and looking at ourselves as the solution. There has been a progression due to 1. Cost of journals 2. Consolidation
- The crisis in university presses – are we trying to replace university presses?
- This gets the Library into areas of expertise that we do not have – such as marketing. Example of HighWire Press (Stanford) providing free online full text articles. Although it is larger than what we would become, are we trying to do a similar thing?
- Status of DSpace – DSpace is finding it difficult to get content. Need to create a community and legitimacy for this. Quality of peer review, sharing space, all of this has not yet happened for DSpace. People are busy and the faculty work in different fields so they don't see themselves as part of Cornell the institution. What is the motivation for this service? Members of the faculty need to consider their careers. Once again the issue of "Branding" comes up. Profession vs. Institution. Example: Icelandic series, tied to the 100-year-old Fiske Collection at this institution, but traditional publishers not interested in it. It demonstrates the advantages of the electronic route.

Implementation

- Any model we have for electronic publishing also needs to be supported by a hard copy. This needs to be built into whatever business model we use.
- We should account for resources for support. The level of infrastructure does not go away just because we have moved into e-publishing
- What does it mean to be a publisher? Euclid - don't want to develop content, offer the means of distribution, publishing is not monolithic anymore, should we offer more services? Consider language issues for non-roman languages
- Electronic means as a way to lower costs. But, it is cheap because we do not provide services (peer review, etc.)
- With a business model, we recover our costs – Example: we charge for Euclid.
- Having alternatives is in general a good thing for scholarly publications.
- Is the Management Team open to shifting funds for collecting?

Potential partners

- CU Press: CU Press does not do journals or digital work, but they do have publishing expertise. The first step in our relationship is to allow CU Press to explore the business and technical part and if it works, we can continue. They are interested in digital work.
- Why does the library need to do this? Shouldn't our partnership be a closer working relationship?
- We don't want to reinvent the wheel
- Need to outsource (editing)
- Some University presses are financially stable some are not.
- Faculty: Need larger discussions with faculty on the CU campus. Is faculty willing to quit publishing in larger places if something like this is in place at Cornell?
- Develop ties with faculty on a broad spectrum that would include publishers. Example: Curriculum Committees. Should we target them concerning publishing?
- In theory this is fine, but faculty don't want to give up anything
- Ph.D. Students

Measures of success

- How do we evaluate what we've accomplished?
- All financially based
- Feedback from scholarly researchers – quality, peer recognition (from other libraries), are the articles being cited

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- Discussion Group Notes
- [Group #2884](#)
- [Group #2885](#)



Notes from Discussion Groups: Objective 8. Respond to the crisis in scholarly communication by clarifying alternatives for publishing outlets for faculty and others at the university.



Group #2884

Facilitator: Susette Newberry

Note-taker: Margaret Nichols

LMT: Tom Hickerson, Ross Atkinson

Attending: Pedro Arroyo, Pat Court, Phil Davis, Erla Heyns, Peter Hirtle, Martha Hsu, Gordon Law, Mary Ochs, Jill Powell, Marcy Rosenkrantz, David Ruddy, William Sayers, John Saylor.

The objective

- Concerns and interests expressed during introductions
 - The high cost of journals is a driving concern
 - Several group members expressed a strong commitment to open access
 - Two people noted the intimate connection between scholarly communication and collection development
 - One person expressed interest in the issue as an author of scholarly articles; another is interested because her library is doing some Web publishing.
- The measures of success should include financial measures.
- A comment on the first sentence of plain text following the boldface in goal 8: "Clarify responsibilities" for whom—faculty, librarians, CUL? Perhaps this is answered by the first bullet under Implementation.
- The current situation is very fluid; this makes clarity difficult in establishing responsibilities and steps for implementation.

Implementation

- Implementation should include letting people know what their alternatives are.
- The focus should be on defining a vision for CUL. A financial analysis should be part of this vision.
- We need responsibility, authority, and accountability.
- Referring to the Open Access report issued by a committee including John Saylor and Phil Davis: should CUL do more such studies? Who should be doing what?
- We need talking points for conversations with faculty who ask for concise advice on scholarly communication issues (the "elevator talk"). SPARC has a brochure we could use (or use as a model) for a concise summary on the issue.
- The current crisis contains both a positive aspect and a negative one. The positive aspect is the advent of new opportunities for scholarly publishing. The negative aspect is the diminishing access to scholarly publications.

- A [policy] statement on scholarly communication would be useful in managing DSpace.
- Textual comments on Goal 8 and following paragraphs in the Priority Objectives Document
 - First bulleted item under Implementation: a “multi-level shared vision” is more a goal than a step in implementation.
 - The implementation bullets listed are all really goals.
 - The sentence in boldface at the top of the page is more specific than the “specifics” below.
 - It’s not clear whether we are to come up with a single solution or a series of options.
- What is CUL’s position on the scholarly communication crisis? Should it have a single position? [There were (at least) two distinct schools of thought on this question:]
 - Dissension on this issue is OK—that’s the academic model, rather than the religious or the corporate one. The academic model is bottom-up rather than top-down.
 - But we need a clear message to communicate to faculty.
 - Could we present the CUL position as a group of options?
 - This issue is important enough so the Library should have a position on it. This will help in negotiations with publishers, for one thing.
 - CUL should have a policy and also offer publishing alternatives to faculty.
 - The “shared vision” mentioned under Implementation in the document can include suggestions for alternative publishing venues. We should be factual, though, not evangelical, in our stance on the issue. A position like “All commercial publishers are bad” would not be right.
 - Copyright is another, related area in which we should inform faculty of the issues.
 - We could develop a policy statement to use as a framework for implementation. Texas, for instance, has a policy that the management of copyrights should further the university’s mission.

Potential partners

In addition to those named in the document:

- Commercial publishers (or publishers in general)
- Cornell University Press
- Faculty groups, e.g. the Faculty Senate
- Cornell President’s Office
- Vice Provost for Research (Richardson)
- Government—a major source of funding

Measures of success

- Are we sure that success in this area can be measured in quantifiable terms?
- One possible measurement would be a decline in the per-unit cost of scholarly information.
- Cost is a symptom of the problem, not the heart of the problem. It’s not the only symptom, though.
- The validity of “Increased publication in open access forums” as a

measure of success was questioned. Current scholarly e-resources like arXiv may be hugely valuable to the scholarly community without any increase in the number of articles published there.

- Is there some way to be more specific about measures of “Increased awareness of issues among CU faculty and administrators”? One more specific measure might be changes in requirements for tenure or promotion of faculty (and librarians!) to include e-publications as fully valid scholarly publications.

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• Discussion Group Notes

• [Group #2884](#)

• [Group #2885](#)



Notes from Discussion Groups: Objective 8. Respond to the crisis in scholarly communication by clarifying alternatives for publishing outlets for faculty and others at the university.



Group #2885

Facilitator: Zsuzsa Koltay

Note-taker: Marijo Wilson

LMT: Tom Hickerson, Ross Atkinson

Attending: Teresa Ehling, Rich Entlich, David Fielding, Anna Korhonen, Terry Kristensen, Greg Lawrence, Leah Solla

The Objective

- **KEY CONCLUSION: "A multi-level shared vision [of alternative publishing system] within the library, the university, and the academy" does not exist.**

Objective #8 should be reworked with emphasis on formulating this multi-level shared vision (would also support Objective #7. Operate an electronic publishing program ...)

- Need to identify the nature of the crisis
 - The "crisis" is 20+ years in the making
 - Problem is international in scope, not just US-centric
 - Flow of scholarly information increasingly restricted and costly
 - Science/engineering publishing is actually thriving; humanities is suffering
- Need to inform key stakeholders on current trends in the flow of scholarly information
 - Lay foundation for increased use of alternative publishing against eventual failure of the current system
 - Acknowledge that faculty have different set of concerns in utilizing alternative publishing outlets (visibility and prestige, tenure and career advancement); communicate clearly the impact on them of the use of alternative outlets
 - Acknowledge generation gap – older faculty established on journal editorial boards; younger faculty have different focus, needs
- Define the Library's role now in scholarly communication process and where it needs to go
 - Library administration must take the lead in pushing for a mandate for change to alternative publishing

Implementation

- Identify stakeholders (faculty and departments, etc.)
 - Alert to current publishing system deficiencies
 - Query them for their perspective on communication flow in their fields; identify needed changes

- Acknowledge the role of the US government, private industry, public corporations
- Educate library staff on the issue; staff needs to buy into the justification of the library promoting alternative publishing outlets.
 - Actively maintain a website on alternative publishing issues, what Cornell is doing, new developments, etc.
- Integrate aspects of the promotion of publishing outlets in job descriptions, evaluations
- Focus efforts locally on encouraging humanities faculty to adopt self-publishing

Potential partners

- Other academic libraries
- ARL
- SPARC
- Professional and learned societies
- Cornell University Press and other University Presses; university press system needs to be strengthened; partnership with libraries
- US government -- a major player in funding as well as producing
- Cornell needs to assume a leadership role in defining this "multi-level shared vision"

Measures of Success

- Educational: An informed faculty and educated staff
- Practical: Practices established to facilitate alternative publishing

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- Discussion Group Notes
- [Group #2886](#)
- [Group #2873](#)
- [Group #2887](#)



Notes from Discussion Groups: Objective 9. Identify the skills and resources needed for library innovation and develop new competencies by training and recruiting.

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Group #2886

Facilitator: Barbara Morley

Note-taker: Casey Westerman

LMT: Karen Calhoun

Attending: Camille Andrews, Marcia Clark, Martha Crowe, Surinder Ghangas, Janet Gillespie, James LeBlanc, Boris Michev, Jean Pajerek, Lydia Pettis, Lois Purcell, Howard Raskin, Deborah Schmidle, , Cecilia Sercan, Jacalyn Spoon, Pam Stansbury

The objective and Implementation

- We need to identify the trends and directions of the profession before we can determine which skills and competencies will be needed.
- It's important to keep in mind that the talent pool is not limited to librarians.
- The managers and supervisors who are studying these trends need to communicate with the ones who are actually directing staff.
- Are we adequately training the staff who will soon be taking the places of departing/retiring staff?
- We may need to revise our concept of a librarian and a librarian's skills. Are there enough new librarians graduating from library schools?
- The expectations are rising for our competencies, skills, and achievements.
- There's a different culture for librarians and systems experts. Librarians may be moved from one specialty to another, resulting in a poor fit; this is especially likely to happen when librarians are trained in non-library fields. We can't retrain people to do something well if it's not what they want to be doing. The staff we have now should identify the areas they're interested in working in, and the skills they have that aren't currently being used. People will usually be willing to take on new responsibilities, if they think they're required to do so, but this can lead to poor performance and poor job satisfaction.
- Managerial staff should be involved before, during, and after any change in someone's responsibilities.
- New opportunities will arise in the library in the next few years, and many librarians would be excited to explore the new possibilities; how do we identify the librarians who'd be interested in these changes?
- Training is expensive and has to be budgeted for. Supervisors need to be aware of the skills their staff have, to know what training is and isn't necessary.
- Training should be periodic and repeated, instead of a one-time event. We need to assess our current training structures as well as the current skill levels of staff. There would have to be ongoing and repeated evaluation. The library has been static for a long time, and we're discussing large changes.

Possible partners

- CIT department of instruction and Library HR. Library tech already does a large amount of instruction. Cornell graduate programs are a resource: recent Ph.Ds have teaching and writing skills and are familiar with the workings of academic systems. Could we create postdoc positions for them? Students are another resource, especially in IT, as they frequently have very useful computing skills.
- Extensive education and training may not be immediately attractive to new librarians, who've recently completed library school and don't want to go back to class just yet.
- Our primary partner in training should be Cornell itself. We should create a culture of partnership with faculty, perhaps have crossover positions between faculty and librarian.
- We have a vested interest in the staff who are already working here.
- Our reliance on outside experts, especially speakers, was questioned: we have incredible resources here and we might be better off relying more on local talent.
- The Syracuse internship program was questioned. Students at the information science school are often looking for jobs outside of the library field and have little interest in interning at CUL.
- CUL pay has historically been low when compared to other universities and, especially, other university professions; this has a dampening effect on recruitment. Ithaca was considered as a factor in recruitment and retention - people are drawn here more by Cornell's status than by its location.
- If recruitment is difficult, staff development becomes more important; we should determine why the people who stay do so.

Measures of success.

- It's important to watch the people who stay at Cornell and advance in their field. Our place in the ARL rankings is a measure of success, as is the number of qualified applicants for open positions; also, the evident respect shown for CUL on the part of other professionals, which is apparent and conferences and other professional gatherings.

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Notes from Discussion Groups: Objective 9. Identify the skills and resources needed for library innovation and develop new competencies by training and recruiting.



Group #2873

Facilitator: David Block

Note-taker: Kizer Walker

LMT: Lee Cartmill

Attending: Pedro Arroyo, David Banush, Ken Bolton, Adam Chandler, Ida Martinez, Elizabeth Perenyi, Patricia Schafer, Martha Walker, Sharon Wargo, Linda Westlake, Marijo Wilson

The objective

Discussion opened with the question of how much more innovative the Library can be. How much innovation is needed?

- One participant responded that innovation must be coupled with continual evaluation and refinement of CUL's existing initiatives. We need to place more emphasis on capturing, storing, and analyzing data about the use of library services.
- What is needed is *qualitative* data to measure the impact of services. It is not enough to count "hits." We must determine whether we are reaching our intended users. Are we meeting their needs? Anticipating their needs? Evaluation must go beyond "librarian-centric" models and embrace insights offered by user behavior and human-computer interaction studies. The Library must avoid making assumptions about user needs from an attitude of superiority. Does CUL have in-house expertise to take this on?
- The priority objective calls for the identification of "skills and resources": what resources – besides financial ones – are needed to support innovation? The group agreed that *human* resources are key here. What are the human skills and competencies needed? We need a terminology to label skills and identify gaps. Important to think beyond traditional library functions and skills.

Implementation

- A typology was proposed that separates skills into: 1. technical skills 2. management skills. One attendee cited a traditional definition of "management": *planning, direction, and control*. The library plans well, but needs to focus better on direction and control.
- People/team/collaborative skills. Are these part of "management" or a separate category? These support innovation that does not come from the top down. Cross-departmental relationships can generate new initiatives. It is not sufficient to hire managers to manage technical staff. Staff who have technical skills need to be able collaborate with each other to nurture innovation.
- Flexible thinking is an essential skill.
- What are the proper roles of recruitment and training? Do we recruit for

- technical skills and develop management skills? How do you gauge management or collaborative skills in an interview?
- It will be important to take an inventory of interests of existing staff. This can be the basis for training/re-training.
 - Gap analysis. Which skills do we have and which do we lack? What can be developed internally? What must we recruit for?
 - The group discussed whether the "innovation" skills referred to in the objective were meant to pertain mainly to the other 8 objectives. Recruitment and training will need to address many library functions that are not included in the priority objectives. Also, since these are objectives for 2005-2006, should the discussion focus on skills that can be developed in the next two years? No, this objective naturally points beyond the others and has a larger timeframe.
 - Question: Which functions or services is CUL prepared to jettison in order to free staff to pursue the 8 priority objectives? And how do we measure the number of staff and staff time required to carry out the objectives?
 - It is important to give proper recognition to work in CUL that is outside the scope of the 8 objectives.
 - An assessment of skills should flow up from the functional areas. This would be similar to the successful approach taken when Voyager was introduced – the functional groups were charged with training their own people according to their own needs.
 - There are at least two (conflicting) approaches to handling staff (re-)assignment to innovative projects:
 - Central administration identifies staff who would excel in new initiative; gives them relief time to work in new area.
 - Evolutionary approach in which functional groups absorb new functions and reallocate staff time based on local needs.
 - Some in the group expressed concern about central administration making decisions about the necessary skills and day-to-day requirements of the units. The group tended to favor a departmental process for identifying skills and gaps. The training of new staff should also proceed in a bottom-up manner, i.e. via the department or unit. But it was noted that commonalities will no doubt emerge among departments/units that can serve as a guide.
 - A creative tension was noted here: departments are likely to try to replicate themselves and their functions into the future but it may require impetus from the outside to enable change. In some cases a system-wide approach is warranted. Recent successful models include the reorganization of interlibrary services and CTS integration.

Potential Partners

The Objectives document identifies:

University Office of Human Resources

Syracuse University School of Information Studies

- The group suggested the information schools at Buffalo and Albany. Also local Cornell potential partners: CS Department (increase existing collaboration), ILR and Johnson Schools (on human resources, marketing, evaluation issues, etc).
- It was noted that discussion at a recent CTS meeting included the possibility of bringing a recent Cornell PhD into the library as a postdoc. Part of the point would be to learn more about the information needs of Cornell academic departments. Could also aid in integration of information fluency into Cornell curriculum, another priority objective.
- Question: How should we collaborate? In partnering with information schools, important that they listen to CUL as much as provide consultancy. Info school partnerships should help the Library solve

immediate problems.

- What has been the experience with HR training sessions, etc.? Management and other classes offered by CU and CUL HR are useful, but they are short-term workshops – what about longer-term study for CUL staff? There are different levels of need for continuing ed throughout the organization. Where does it come from? HR? Library school collaborations? Elsewhere? There was a sense in the group that HR training, especially at the university level, does not thoroughly address concrete problems.
- A disparity was noted between staff training (theory) and its implementation (practice). Management needs to entail monitoring staff to see that training is put into practice correctly. Supervisors need to set expectations and follow up with praise and critique. Technical skills are undermined without management.
- Can the Library and departments nurture staff development more consciously, e.g., through carefully graduated assignments? What is the role of mentorship? What is the status of the CPD mentorship program?

Measures of Success

- How do we know when we have succeeded? Evaluation is in the eye of the beholder (“I know it when I see it”). We do not have adequate measurement tools. CUL has ambitious people in management who will always raise the bar: “There is no finish line.”
- The hope was expressed that when information and input are solicited from staff, they actually be used by the administration.

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Notes from Discussion Groups: Objective 9. Identify the skills and resources needed for library innovation and develop new competencies by training and recruiting.

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Group #2887

Facilitator: Elaine Westbrook

Note-taker: Lee LaFleur

LMT: Karen Calhoun

Attending: Jean Callihan, Kathy Chiang, Angela Horn, Mihoko Hosoi, Jesse Konnecke, Deb Lamb-Deans, Susan Markowitz, Thomas Mills, Matthew Morrison, Rich Strassberg, Debra Warfield, Iris Wolley

The objective and Implementation

- One early comment stated that the objective should be focused less on the skills needed for library "innovation" but more on the skills needed for the survival of the library as an institution. On a broader level, this comment was intended to emphasize the importance of skill and competency development beyond innovation. A follow up comment suggested that perhaps the term innovation was more indicative of the competitive nature of CUL, in which innovation was also a key factor in maintaining the status of CUL as a research library.
- Another more general comment questioned the stated time of "five years", indicating the ultimate need for ongoing skill development in the longer term.
- In moving onto the discussion of needed skills and competencies, there was a question about whether we should be identifying "actual" individual skills, which would be numerous to name, or talking more generally about methods for identifying skills and competencies.
- In response, there was a suggestion that the group could probably come up with more general categories of skills, but ultimately there seemed to be agreement that generating a list of individual skills was perhaps beyond the scope of this meeting.
- The group shared ideas for identifying categories of skills and suggested that existing documents like the Cornell Staff Skills for Success or Job, and Band (E, F, etc.) descriptions could be used to guide this process. There was also a suggestion that members of CUL functional groups and project teams might also be able to provide insight on needed and important skills as well as gaps in existing skills that need to be developed.
- One member commented that much of the existing skills/technology training on campus is poor.
- Another commented that managerial and time management skills form a needed skill set that often impact both recruitment and retention of other employees.
- Someone else suggested that training only helps if staff actually have the opportunity to use it in a timely fashion afterward, and commented on the value (and intricacies) of training at the time of need was discussed.
- The discussion turned to the importance of and methods for inventorying existing skills among CUL staff, as well as the pros and cons of this

approach.

- It was suggested that while certain staff members may possess a given skill they may not have the time to apply it due to their other work responsibilities.
- One participant also commented that skills should be hired not diverted, suggesting that employees who have certain skills may not want to be pulled out of their existing jobs to use those skills in support of other tasks.
- In response, however, another comment highlighted that some employees both enjoy and benefit from this type of job flexibility, but that it should be included in the job description whenever possible.
- Overall the group seemed to agree that some sort of inventory of existing skills would be worthwhile for CUL.

Potential Partners

- In discussing potential partners, it was suggested that professional organizations (including those outside of the library) and Cornell Human Resources would be good candidates to aide the library in inventorying and identifying skills. One participant also suggested using faculty and students in departments like ILR to aide the Library in the process of identifying skills. ILR professor Scott Snell, whose specialty is in "Human Capital" studies, was mentioned.
- The Syracuse School for Information Studies (SIS) was also mentioned as a partner in providing training.
- Someone suggested that better awareness and publicity of existing training opportunities was needed.
- There was also a comment that the library should also be vocal about influencing the type of training and curriculum offered by library schools including SIS.

Measures of Success

The group discussed ways in which the library could determine what skills would be needed five years from now.

- It was suggested that one way of assessing this would be to consider they types of projects the library would want to be working on.
- Someone suggested that one measure of success was simply to do a project and to see if it came out well. Another member complemented this suggestion by commenting that being successful the second time around was a measure of success and cited the success of the Voyager implementation versus that of NOTIS before it as a success.
- There was also some discussion of a need for outcomes and examples for competencies. One member commented that after each project, groups should be debriefed to find out their impressions on how the project went and what they would do differently given the chance.
 - The conversation then turned to differences in competency and skill development between professional and paraprofessional staff. A couple of people in our group emphasized that these should be similar if not the same.
 - One member of the group highlighted that staff development plans during employee reviews serve a skill development function. Staff members both professional and non- should be indicating their goals and interests for skill development as part of their annual reviews. Each year during the follow up review, their success should be reviewed and noted.
 - Yet another member of the group commented that promotion was another measure of success and that for paraprofessional,

graduating into an MLS Program might too be a marker.

- Near the end of our time, there was a brief discussion about recruitment, impending retirements and "succession planning".
- Apprenticeships and a training program for non-MLS post-docs were among the suggestions for recruitment.
- With regards to succession planning, one suggestion was for the library to look at the skills we would be losing through retirement in the coming years and seek to train, identify or recruit for them.

Additional comments received after the session

- The library should "Ensure that staff have time to examine innovative ideas that may not be specifically being pursued by the library at the moment."
- The library should use "participation in projects as a way to train people."
- Unless there are adequate funds and clear administrative and managerial support Priority 9 cannot happen."

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