Robbie Ewen Fellowship 2012

By Deborah A Morrison

STUDY TOUR AND CONFERENCE, STANFORD 15 – 20 APRIL 2012

Robbie Ewen Fellowship Report

Applicant: Deborah A Morrison

From: University of Edinburgh Business School

Visit Location: Stanford University, United States of America

Timescale: April 2012

Objectives: To obtain information on latest developments of business library database providers and to discover how Business Schools in the States and Asia Pacific approach the delivery of timely, quality business information to high fee-paying postgraduate students.

Conclusions: A very successful and enjoyable visit which achieved many of the objectives intended and allowed for an increased network of like-minded business librarians.

IN CONTEXT

EBSLG

The University of Edinburgh Business School is a member of the European Business Schools Librarians Group (EBSLG). The European Business Schools Librarians Group was inaugurated in 1970 by several business librarians in order to exchange their experience and professional knowledge. The purpose of EBSLG is to provide a pan-European forum for the directors of the libraries of the leading European business schools. Members meet twice per year to discuss issues of mutual interest, share information and participate actively in working groups. Interests include managerial and administrative issues and trends, co-operative initiatives to aid the provision of information in business schools, and opportunities for international collaboration and networking. There are currently seven UK Business Schools in the group.

Its reputation is enhanced by contacts with organisations, business schools and suppliers of business information. Specific project outcomes include a union catalogue of periodicals with an inter-library delivery system of photocopies, an internal newsletter on institutional and library developments, statistical surveys and staff exchanges. Members also anticipate evolutions in information technologies and their impact on libraries, while giving impetus to policies in the teaching world to stimulate innovation in educational technologies. EBSLG is directed by a Council which consists of president, secretary, treasurer, a projects co-ordinator, and the co-ordinators of the three regional groups: Continental, Northern European, and Anglophone. Each of the three regional groups works in its own way, on specific problems or themes common to the EBSLG as a whole. The Regional Meetings initiate discussion and make propositions for matters to be discussed at the Annual General Meeting. There are 44 member institutions.

Every three to five years, the EBSLG meets up with the American Business Directors Forum (ABLD) and the Asia Pacific Business Schools Librarians Group (APBSLG) to discuss topics of mutual interest to all. In 2012, it was hosted by Stanford University.

ABLD

The American Business Library Directors provides a forum for directors of top academic business libraries in North America to discuss mutual concerns and share information. Interests include:

- Managerial and administrative issues and trends
- Cooperative initiatives to preserve and provide access to unique collections in business
- Influencing development of new products and services for the academic business library market
- Maintaining relationships with information vendors
- Informal collaboration and networking

There are 43 member institutions

APBSLG

The Asia Pacific Business School Librarians' Group was inaugurated in 2002 by several Business Librarians in order to exchange their experience and professional knowledge. The purpose of APBSLG is to provide a forum for the directors of the libraries of leading Asian Business-schools. Members meet once in a year to discuss issues of mutual interest, share information and participate actively in working groups. Its interests are very similar to those of ABLD.

Aims and Objectives

- To provide a forum for discussion of matters of mutual interest and work practices
- To foster and assist collaborative activities, such as staff exchange or data sharing for benchmarking
- To provide mutual support through information exchange
- To promote ongoing contact between members
- Members also anticipate evolutions in information technologies and their impact on libraries, while giving impetus to policies in the teaching world to stimulate innovation in educational technologies.

There are 17 member institutions.

2012 joint conference

In 2012, the conference was hosted by Stanford University, from 16-20 April. The focus of the conference was Return on Investment (ROI)

Having arrived quite late on the Sunday, Monday 16th was a day when conference attendees spent acclimatising and familiarising themselves with the Stanford campus. This campus- the second largest in the world, is a thriving residential campus and community. It sits on 8,000 acres of foothills and plains on the edge of Palo Alto and caters to 11,000 students who are all living on the grounds.

Stanford University’s Green Library

The conference started proper with tours of both Stanford University Library and the Business School Library. The Green Library is the largest library on campus and houses Stanford University's Information Center, Media & Microtext Center, Special Collections and University Archives, and many other central library services and resources. Privileges, circulation, and reserves services are available at the main desk in the East Wing. The desk is staffed during all business hours, some days from 08.00 – 01.00 the next morning. Here, you can check out materials and other requested items, apply for a locker, dissertation study carrels, or faculty study carrels, pay fines or get information about your account e.g. how many books you are currently borrowing and when due back and to purchase library cards. The front-facing information centre does most of the user support in helping staff and students find quality information.

Stanford University libraries can be accessed by current faculty, students, staff, and their spouses and partners, Fellows, Postdocs, and Visiting Scholars, Courtesy cardholders, Stanford Alumni, the hospital clinicians and staff from the on-campus hospital and continuing studies and summer program participants. It also provides access to cooperative program participants (RSP and RLCP) and library individual and corporate members. General members of the public can come in if they have a genuine research need.

Stanford University Libraries develops and maintains a broad array of information resources, including SearchWorks, article and indexing databases, e-journal subscriptions, and specialized collections crossing subjects, formats, and genres. Stanford University Library also provides computing resources, including public computers, digital scanning and editing equipment, support for multi-media projects, geospatial software support, and social science data and software services and support.

The Albert M. Bender Room (renamed for Albert M. Bender, the San Francisco bibliophile whose philanthropy benefited Stanford's rare book collections) offers beautiful views of the Quad and the hills beyond the eighty square mile campus, as well as comfortable seating and a quiet atmosphere for study, leisure reading, and reflection. The Bender Room contains a non-circulating collection of books of current and classic interest, both fiction and non-fiction. This collection is made possible by a generous gift from the Stanford University Bookstore. The Memorabilia Area of the room, together with its adjacent reading area, has been dedicated to the love of reading.

Tours of the Stanford University Libraries are offered year-round, with special orientation tours for incoming students at the beginning of each academic year. Subject Librarians are available for individual consultation, group classes, and special workshops.

Stanford Graduate School of Business

Mission statement:
“Our mission is to create ideas that deepen and advance our understanding of management and with those ideas to develop innovative, principled, and insightful leaders who change the world.
We seek to attract faculty and students with high leadership potential and engage in an academically-rigorous, research-supported, mutually-responsible learning process, enhanced by uncommon levels of interdisciplinary scholarship and community engagement. Classes are conducted only on a full-time residential basis in an intimate-scale environment, and take full advantage of the assets of Stanford University and its surrounding communities. The impact of our ideas and our students extend globally in meaningful ways.
The following values are widely shared in the Stanford Graduate School of Business community and provide the context within which the School strives for excellence in achieving its goals.

“To engage intellectually, strive for something great, respect others, act with integrity and own your actions”

Its innovative programs include a two-year MBA Program, designed to educate business leaders, a one-year Stanford Sloan Master’s Program for mid-career executives, a PhD Program for future academics, executive education programs for experienced managers and a faculty research program. This is very much in line with other Business Schools, both in the US, the UK and elsewhere worldwide.

The Business Library exists primarily to serve the needs of the current faculty, staff and students of the Stanford Graduate School of Business. It is also open to current members of the Stanford community for their business research needs and to members of the public. It is open from 08.00 – 19.00, Monday – Thursday, and 08, 00-18.00 on Friday and is closed Saturday and Sunday.

The Stanford Business School opened in 1925, founded from the inspiration of Stanford alumnus (and future US President) Herbert Hoover. Although there was no formal library yet, staff began to collect books and subscribe to over 80 journals. In 1933 the Library was formally inaugurated on April 3. Stanford President Ray Lyman Wilbur allocated room 429-B in Jordan Hall as an autonomous library under the direction of the Graduate School of Business. The collection was established with 1000 volumes and assorted reports. The Library was moved into the newly reconstructed Assembly Hall in Building 120 in the Stanford Quad in 1937. Students appreciated the increased space, the additional book stacks and the air conditioning. Four years later the Library contained almost 8,000 volumes and 85,000 pamphlets. School enrolment dropped so low during the war years that the faculty was reduced to a skeletal staff. The Library remained busy by meeting the research needs of 2,500 soldiers enrolled at Stanford for Army Specialized Training.

In 1956, the Library was named the "J. Hugh Jackson Library" in honour of the retiring Dean. Ten years later, it moved into the newly constructed Graduate School of Business building. Computer automation had its first impact on Jackson Library when the serial catalogue records were automated. These computer-generated records greatly increased access to the collection.

The roof above the Library was remodelled in 1979 to create an additional floor for high-density compact storage. This was where the archival corporate reports collection was housed - one of the world's largest. 1983 saw the first computers for student use installed in the Library, primarily for Lotus spreadsheets and word processing purposes. Four years later, the first CD-ROM database for patron use, *Compact Disclosure;* was purchased. It was locked in an acrylic shroud to maintain security and accountability for use. The Library acquired its first full-text article database, *Business Periodicals Online* three years later. This initially temporary donation became an essential aid to researchers.

The rapid growth of electronic information sources fostered some fundamental alterations in the Library's organization and service. As the lines between computing support and libraries grew less distinct, the Library joined with Computing Services to create a new department in the School known as Information Resources. In 1994 the Jackson Library went on the Internet. In addition to offering easier access to on-site library information and databases, it provided links to internet sites selected for their value to business researchers.

Over the years, the Library's collection has increased and diversified to meet the changing research and teaching needs of the School. With over 400,000 volumes, 1600 periodical subscriptions, and numerous electronic databases, the Jackson Library collection is widely recognized as one of the premier academic business resources in the world and Jackson Library is poised on the edge ready to meet the challenges of providing information in the electronic age. The Jackson Blog was unveiled in September 2006, connecting with the blogger community at the Business School, regularly sharing informal conversations on faculty research, alumni businesses, business news, and new resources in the library.

Since 2011 the Graduate School of Business (GSB) Library has been located in the Anne T.and Robert M. Bass Center, a prominent feature of the new Knight Management Center. The multi-purpose Bass Center provides a range of environments for students, including classrooms, study & meeting rooms, a reading room, computer lab, and quiet study areas. With library and IT staff providing assistance on site, they have created a place that stimulates interaction and collaboration; a place where GSB faculty, students, and alumni can come together with colleagues from elsewhere on campus and beyond; a place to stimulate interaction and collaboration; an intellectual commons to support the goals of excellence, collaboration and community that are integral to the GSB. The library will continue to evolve to incorporate new technologies and meet the changing needs of scholars in the years ahead.

The conference:

The conference was opened at 8am by Kathy Long's welcome and introduction, including all 'house rules' while attendees enjoyed a delicious continental breakfast. Based in Stanford Business School, Kathy, and Library Director, had all the organising of the conference to do and, with a small team, ran the whole event effectively and efficiently. She then introduced Michael Keller, Stanford University Librarian who also gave a warm welcome, speaking a little about the Libraries at Stanford and introduced the first keynote speaker.

Keynote 1

The first keynote speaker was Chris Bourg, Assistant University Librarian, Public Services at Stanford University. She did her undergraduate degree at Duke University and while there she was in the Army ROTC, and then went straight into the US Army as a young Lieutenant straight from college. She was stationed in Germany for 4 years then the Army sent her to get a Masters degree. This was so that she could teach Sociology and Leadership to cadets at the United States Military Academy, West Point. Teaching, scholarship, and higher education took a grip, so she resigned her commission after a three year tour and came to Stanford to do a PhD in sociology.

On finishing the PhD ten years ago, her library colleagues convinced her to apply for the Social Sciences Curator position in the Library for which she was successful. She has never been to Library School or done a Masters in Library and Information Science so does not consider herself a Real Librarian. She is currently responsible for all the Social Sciences and Humanities libraries and librarians, special collections and University Archives even with her degrees in Sociology and a rigorous background in quantitative and statistical programming from a prestigious institution. She has learnt much about humanities research and about library support from her colleagues. This has very much informed her evolving perspective on libraries.

Regarding return on investment, her perspective on libraries and specifically on applying ROI techniques and methods to assessing the value of libraries, she is sceptical, particularly applying it to the work of large US research libraries like Stanford. She believes an ROI framework is dangerous for academic libraries for three big reasons:

ROI tends to focus on the short-term and quantitative, while the real impact of academic libraries tends to be long-term and qualitative

An ROI framework does not account very well for 'rare events' and academic libraries are about facilitating rare events in part.

Regarding the short-term v long-term tension, when she speaks of ROI, she is not talking about economic returns. Academic libraries are non-profit, so strict financial returns are not what Stanford is about.

To understand and assess the value academic libraries bring to universities, coming from the University's mission statement, which is not about making money. One of the key objectives of the mission statement is to prepare students to be successful and useful and to promote public welfare. So do the investments we make in our libraries contribute to students' personal success? – Yes, they do advance those aims but not necessarily in yearly increments that can be measured and reported as metrics to gauge ROI.

Stanford is "a University for the 21st century and beyond: a university that will better serve the world through the quality, impact and vision of its research, and through the new generation of leaders it will produce." (Professor John Hennessey) Again, these are long-term goals. They are not talking about higher graduation rates, retention rates or employment rates. So ROI in Stanford cannot be measured that way.

Academic libraries exist to further the goals of their parent institutions. We collect, describe, interpret, share and preserve information – we are in the business of "protecting, collecting and allowing the use of information." We do this in all the old traditional ways in growing and maintaining the physical stock, answering enquiries and running workshops every year. The numbers of these are not going down. However, it is difficult to see how these 'tasks' actually contribute to developing great leaders. We also protect, collect and provide access to information in many new ways: as information production, discovery, use, re-use and consumption is happening in all kinds of new and innovative ways – ways that our traditional measures of usage may not capture very well.

Stanford is more than a traditional library – it is a leader in digital library innovations. For example it was one of the five original libraries participating in the Google Books project, agreeing to let Google digitise its collections. Getting the words inside books digitised allowed them to be indexed and searchable and so would enhance discovery and open up treasures to a wider audience. The words have now become data. The sheer size and comprehensiveness of the corpus of digitised texts now available is only possible because libraries collected and preserved lots of books over many years.

Librarians who select many of the titles that are now part of a researcher's toolkit never anticipated the sort of use the researcher might make of the textbooks – we have purchased stock on a 'what if' or 'just in case' basis. We ought to be cognizant of the fact that the objects we collect today, physical or digital, will almost certainly be used in ways we cannot yet anticipate.

Stanford is also investing in collecting born digital materials and two of Chris Bourg's particular interests are data curation and digital forensics. With data curation the amount of data that is being produced today is overwhelming – the massive amounts of social data and business data – which are increasingly one and the same. Just as there have always been more written words than we could possibly collect and preserve, there is now much more data than we can handle. We also know that social network data is invaluable to researchers in social sciences, marketing and business. So again, an area where ROI will be hard to predict – some data we can easily predict and will be heavily used; other data- we collect and preserve so that future scholars can make use of it in research.

As we continue to collect archival material, we are increasingly collecting data that is ‘born digital’ - diskettes, computer tapes etc., holding valuable research output. A key difference in investment in digital archiving and forensics, versus paper archiving – with fairly minimal intervention, we can take a box of letters or paper manuscripts and put them in appropriate storage conditions, then trust that they will still be usable when we want to access them. Cassette taped and data tapes are already at risk and we need to deal with them quickly. So investment is considerable to make these accessible to a small number of future users. The investment represents a leap of faith as librarians, making best guesses as archivists.

In collection development and preservation, we have to focus on the long-term. We collect and preserve for today’s scholars as well as for future generations – it’s true for book collecting and as true for new collection areas, like data or multimedia objects. So any assessment of ROI on the collections of a large academic library has to account for long-term impacts.

How does the number of reference questions asked and answered help us to understand the impact? Is number of questions a good proxy for the effectiveness of a reference programme at contributing to teaching, learning and research? This is probably a better measure than some, but still not a very direct measure. One could argue that the high number of reference questions asked means the online tools are too confusing or the website is not user-centric or that it is hard to negotiate the stacks. Yet promoting reference in our instruction sessions, tours and workshops may be a decent way to measure how effective our outreach has been.

Teaching scholars about library services and access is a good way of assessing effectiveness. This significant investment of librarian time with postgraduate MSc and MBA programmes results in lots of positive feedback from patrons, but we do not survey them and it does not tell us anything about how the workshops contribute to the goals of the programmes or to our goals of developing students enthusiasm for and skill in finding and using scholarly resources.

Library Instruction is an area where Stanford can do a good job at assessing effectiveness from the point of view of learning more about and improving presentation skills. However, it told us little about how the workshops and the availability of an assigned librarian, contributed to the goals of their programmes or to their goals of developing students’ enthusiasm for and skill in finding and using scholarly resources such as how to find journal articles, use market research wisely or download quality company information, financial data or news. (I know personally, that many of my postgraduate students are finding the data they require, after being shown how. I see the evidence in the photocopies left at the copy machine and in the bibliographies at the back of their dissertations. However, I know that some can complete the whole programme, not generally successfully, without using anything but Google.)

At Stanford, they survey users quarterly to find out about library use. 99% of students use the library catalogue – this is a higher percentage than they would get without their workshops. The library catalogue and databases were rated most useful, ahead of Google and Wikipedia. Nearly 40% of students consulted a librarian about their research paper and students who consulted librarians were more likely to use library databases and online Research Guides than students who did not consult a librarian. In addition students who consulted a librarian rated the library databases more useful than those who did not.

This is good data to show that investment in instruction pays off in terms of use of library resources and an appreciation of the value of library resources, including the librarians.

Stanford’s next logical step would be to conduct even longer term assessments to find out if the work they do with first year undergraduates pays off throughout their four year course and beyond.

So Chris Bourg is not opposed to library assessment or to the practice of calculating ROI, merely cautious about it especially when a ROI approach leads them to focus on short term outcomes that might be very far removed from the long term goals librarians have, of supporting research and learning in the service of developing educated citizens who will solve world problems. We need to think carefully about the data we collect and the metrics we use, lest we start to mistake reference traffic or circulation statistics as the real goals. We need to recognise the qualitative rather than merely the quantitative nature of our contributions. Above all, circulation is the most over-rated quantitative measures we have.

Regarding circulation numbers at Stanford, The Lord of the Rings DVDs would seem to yield the highest return on the collection’s investments since it is the most circulated item in the last five years. They are happy that it circulates so well. But the issue with using circulation as a key measure of value for no other reason would lead them to overvalue Lord of the Rings and undervalue collections like their historical newspapers. After all, Lord of the Rings is the heavily circulated item, and the microtext collection that contain the text and images from 100s of years of historic US newspapers are much less frequently used.

Thinking about impact on research, Chris mentions a fairly new book by Richard White which provides a new and controversial vision of the” Gilded Age” in the US with the great impact of the transcontinental railroads on the making of modern America. Instead, White’s book reveals chaos, dysfunction and failures of the early railroad industry. Reviewers noted that White relied heavily on archival materials, rarely used by others and on dusty reels of microfilm never before looked at, to present a very different picture from that usually depicted. He used low-use materials which then showed much return on a librarian’s investment.

Acknowledgements of libraries, archives, librarians and archivists in published material constitute a direct and real measure of our impact on scholarship. How this can be measured in reality is uncertain, but the idea has potential.

A book reviewer, Kristy Logan, wrote recently about the impact of the 800 unread books she has on her bookshelves at home. It does not matter that she has not read them all yet. The books provide the correct ambience for her to write in. It is the same at Edinburgh University, as at Stanford, library user numbers are growing year on year in both places, as well as in the Business School where I work. My library desks are nearly always fully occupied, with students lurking nearby, hoping to grab one when it is freed up. This is not necessarily to read books or use the specialist databases provided. They just want to work in a studious space, surrounded by the material that ‘could’ help them.

And there is data to support this. A cross-national study of family scholarly culture and children’s educational attainment, published in 2010, found that

> “Children growing up in homes with many books, get 3 years more schooling than those children from bookless homes, independent of their parents’ education, occupation and class”

Chris’s point here is that there is value to libraries and to collections that are no less real and no less impactful for the fact that they can’t really be measured.

Her real concern with ROI is that even long-term qualitative assessments of impact will always miss one of the most important functions of an academic library, which is to facilitate the rare, unexpected and random event - **serendipity**. It is absolutely the responsibility of libraries to encourage, support and make possible the unanticipated discoveries that lead to new knowledge, new ways of thinking and new contributions to the cultural and scholarly record. Providing the context in which new, unanticipated, unique discoveries, thoughts, connections and inspirations are sparked may be the most important value-added contributions that libraries can make.

Keynote 2

The next speaker was Jennifer Aaker, general Atlantic professor of Marketing at Stanford who gave a talk entitled Dragonflies & happiness: a social media love story.

She was teaching a class called 'Creativity and Innovation' where she shared the story of Sameer Batir, a Stanford undergraduate and social entrepreneur who, post-graduation, started building small start-ups, for profit and not for profit where a social mission was built into the brand – 'where business meets meaning'. While on honeymoon travelling through India, he fell ill and was quickly diagnosed with leukaemia in May 2007. His friends were shocked and more so when they heard of another friend, Vinay Chakravarthy, a doctor who lived in Boston and who had been diagnosed in November 2006.

US estimates for leukaemia in 2009 reported 44790 new cases and 21870 deaths –a mortality rate of 49%. The best chance lies in a bone marrow transplant from another person but finding a donor requires an almost perfect genetic match (10/10). The highest probability lies in the same ethnic pool. In the States there is a National Marrow Donor Program bone marrow register of over 7.5 million individuals. For European Americans there is an 80% match but only 1% for South Asians, giving them a very slim chance of finding a donor – 1 in 20,000. They did not find a match for either Sameer or Vinay and there was no bone marrow registry in India. The group of friends had to do something. They had to do something and do something SEISMIC. And they needed to do it fast. They needed to scale and had a matter of weeks to do it. They decided to hold bone marrow drives to register 20,000 Asians within six weeks. Sameer's friend Robert spent three hours constructing an email which told the story of Sameer, so well and so compellingly that readers would feel that they knew Sameer and asked 10 friends to send it to 10 more people etc. They pointed them towards their website which told Sameer's story. They turned to social media and used Facebook, Twitter, LinkedIn etc. to spread the story. They organised teams with a team lead, team marketing, team education, team regional etc. They turned to social media – Twitter, Facebook, LinkedIn - to spread the word with one clear focus – to get 20,000 south Asians to register in six weeks. They built a brand – Help Sameer Strategy. They used all types of format to spread the word – widgets, blogs email, fliers, web links, television, public relations, homes, universities and corporate drives – with the message - 'Holding a bone marrow drive at work for dummies'. They needed to change people's perceptions about how difficult it was to be tested for bone marrow. The website was very straightforward with easy to use links to how to help – e.g. letters – "Dear John, I'd like to run a bone marrow drive" – copy, paste, send – or a thank you letter – copy, paste, send. In 11 weeks they held 470 drives and achieved a figure of 24,611 South Asians on the register. Sameer found an exact match, and his friend Vinay found one with 8/10 match.

The campaign worked because it had one clear goal, it reversed the roles – instead of saying 'We can't…' instead say 'what can we do…?' It told a powerful, truthful story and it was designed for collaboration, architecting a campaign to get other people to act. Both men received transplants though unfortunately it was too late for them. However, in the first year of the campaign, they found 266 good matches which raised survival estimates to 80%, instead of 40%, giving a gift of hope and time.

Most revolutions are sparked by the actions of a few with a clear mind and a large idea. We need to find the ignition and light it.

Pecha Kucha 1

This first pecha kucha session was given by Alex Caracusso from MIT Sloan Management School on the topic 'Executive MBA Support: First Steps'. At IT Sloan the EMBA schedule is designed to maximise learning while complementing work and home life. Their first cohort of executive MBAs began in October 2010 with 70 students. This programme is a rigorous 20 month programme designed for mid-career executives poised at pivotal junctures in their careers. Through advanced management practices and applied learning projects, the programme provides a broader perspective and the tools to increase delegates' impact. Over the 20 months, classes are held every three weeks on Fridays and Saturdays, a week-long module every six months and a one-week international project trip. In the first year, 83% of delegates were at director level, with an average age of 39 and 17 years of experience. Comments from ABLD members reported that EMBA students were 'generally more demanding', 'need more assistance' and that they have 'rarely had to assist EMBA students' so very different experiences Other comments: encourage them to use the library 100% for coursework and 0% for their jobs', 'identify a cooperative professor early in the new EMBA', 'some librarians…do not love working with EMBA students' and 'you'll have a lot of fun with this group'

Critical issues were setting expectations for meeting their demands, outreach activities with almost exclusively remote students and promoting non-commercial use of library resources. MIT Sloan is considered a leader of action learning in management education. With their approach to real world practice, students are immersed in personal reflection to develop principled innovative practices to solve complex problems and produce systemic changes.

Alex recommended that librarians wait until the final semester, do instruction remotely and have an admin-level presence on the course website. Fifteen out of the seventy students attended his Webex instruction session, got positive feedback from students and has had three research inquiries so far but expecting more. His thoughts half way through the programme was that the EMBA is OK, verdict is still out but the WebEx experience has been good.

Pecha Kucha 2

The second Pecha Kucha was entitled 'The Ideal Research Environment for Business Faculty and Researchers: Uncovering What It Means To Visibly Support Research Through Space Design In The Future by Karen King from University of Virginia' At the Darden Camp Business Library, they support the goals of the Dean of the School in expanding their research footprint and provide an environment that supports learning and research activities. Could parallel activities exist in the same space of the library? There are challenges with space in the entire Darden complex. The faculty office building is full. They asked themselves if research centres could become a part of the library environment. There were opportunities related to library space in the entire University of Virginia. They did a retro fit of storage facilities and de-duplicated the agreement among UVA libraries. Research was conducted at the Darden Business School in the form of an interactive *'Ideal Research Environment'* workshop. Participants took part in the series of exercises designed to better understand the research process at Darden. They had a vision to create flexible environment that accommodates multiple types of users and uses. One part of the study included faculty, visiting scholars, researchers, research centre staff and PhD students. Analysis of work patterns and space needs at different phases of the research process was carried out. Another part of the study included students – what were they doing? What else were they doing? What were they really doing? Participants were asked to take part in a “sandbox” activity that allowed for the exploration of actions, technology, and settings that support more effective and innovative research processes. The activities of the “sandbox” activities with faculty and researchers highlighted the fact that space needs of researchers differ at each phase of the research process.

They came up with a plan to allow users to move in and out of different types of space throughout the day. The concept of research suites provided workspace – both office and touch down space for visitors with formal and informal space.

Darden Camp Library renovations reflect the concepts that were discovered and documented during the Ideal Research Environment study. The renovations covered one sixth of the library space footprint.

ROI on Business Libraries

There then followed a session with some of the vendors who support the event and who told us about all the developments they were planning for their specialised business databases. Many of these vendors have their products in place in our Schools already, but are always developing further services. After a refreshment break, we then reconvened for a panel discussion around returns on investment on Business Libraries. The facilitators were Dan Tuttle, a coach in the executive education programme at Stanford and Evelyn Huang, a lecturer and manager of the executive education program. The Hasso Plattner Institute of Design is a place for Stanford students and faculty of many disciplines to learn and engage in design thinking. It is a place where people from big companies, start-ups, schools, nonprofits, governments and anyone else, to work together to solve big problems in a human-centred way This was a lively event with much input from Business School librarians as well as panel members.

The next day started off with a group exercise led by Stanford Design School called “An introduction to Design Thinking”. As could have been imagined, this was highly proactive in style. We were all asked to introduce ourselves to someone we did not already know. This was the first hurdle and the person became your partner for the exercises. The first mission was to redesign the gift-giving experience – for your partner in the room. We were advised to start by gaining empathy while conducting a four minute interview. Then we had to dig deeper with a further three minute interview. They then went into the needs and insights about our interview partner. We then had to sketch out 5 radical ways to meet our users’ needs. After feedback we had to reflect and generate a new solution, build it and use it.

Tour of Berkeley

We then all boarded buses to drive to the University of California, Berkeley where we were catered for before setting off on a tour of the campus, followed by a visit to the Thomas J Long Business Library, led by Hilary Schiraldi, Head of the library. The library occupies two levels of the Student Services Building of the Walter A. Haas School of Business. The School and the library were designed by the late Charles Moore and his colleagues at Moore Ruble Yudell. The library, which opened to the public in January 1995, was built with funds generously provided by the Thomas J. Long

Foundation, with additional gifts from the Clarence E. Heller Estate, the family and friends of Steven V. White, as well as other generous alumni and friends of the School.

The library's entry level is devoted to public services including circulation and reserves services, the Steven V. White Business Information Center, which provides reference and research assistance to the library's clients, and a variety of networked and other public-access online information workstations.

The **lower level** of the library contains the Clarence E. Heller Reading Room for current business newspapers, the current periodicals stacks, the library's microform collection, the book and bound periodical stacks, group study rooms (which may be reserved on **EMS** for use by Haas School students), general study areas, individual study carrels, and restrooms. Copy service rooms are located on both levels of the library.

The library provides 55 individual study carrels and more than 25 sharable work tables for students to use. Electrical outlets are located in most tables, with Airbears wireless network access throughout the library. Airbears is a free wireless service that enables connections to the campus network using a computer equipped with a wireless ethernet adapter.

The Thomas J. Long Business Library houses the major collection of business administration materials on the University of California, Berkeley campus. The Long Library's collections emphasize the academic and scholarly aspects of business to support the research and teaching mission of the university. Special strengths of the collection include: business ethics, company and business history, corporate finance, corporate social responsibility, entrepreneurship, family business, high technology industries, innovation and technological change, and nonprofit management.

The collection includes over 150,000 books, 1.6 million microforms, and thousands of subscriptions in digital format. A large digital library in the social sciences supports the interdisciplinary research needs of graduate students and faculty.

The 1994 Nobel Prize Medal in Economic Science

In 1995, Professor Emeritus John C. Harsanyi donated his Nobel Prize to the Thomas J. Long Business Library. Visitors may view the medal in a special case in the library's entrance lobby.

Dr. Harsanyi was awarded the Nobel Prize in 1994, with John F. Nash (Princeton) and Reinhard Selten (Rheinische Friedrich-Wilhelms Universitat Bonn), for their pioneering analysis of equilibria in the theory of noncooperative games. Hungarian-born Dr. Harsanyi taught at the University of California, Berkeley from 1964 until his retirement in 1990 and was a frequent user of the Long Library.

On the way back to Palo Alto, we were given a tour of San Francisco before heading south for dinner down the coast.

Friday, 20th April started with a data curation panel where we discussed "High End" research data sets. It was an exploration of issues, together with results of a survey of the ABLD/EBSLG/APBSLG members. We looked at how high-end research data sets are managed, funded, accessed and supported. What role should the library play in the provision and support of research data sets? The fragmented nature of the purchase, and awareness and support of these resources means often their existence is not publicized, so not evident except to a small group. The presenters were advocating the value of the Library acting as a coordinator in terms of the management of these resources. They can provide expert evaluation and administrative support. The library is active in advertising and evaluating proposed new data sets, comparing them against other similar resources currently in place along with the academic groups concerned. How much support do proposed data get from Schools who have the data specialists to critically assess them?

These data sets are usually specialized and often required for short, intense and sporadic use rather than 'regular' subscription. Their value may be difficult to measure – tied to quality not quantity of output and there may be insufficient "domain" experts on the ground to assess and support the data set.

Data sets available to the business community:

CRSP, Datastream, WRDS, Bloomberg, CompuststGlobal and US, IBES, SDC Platinum, Capital IQ, Eventus, Worldscope, , FDIC, Penn World Tables, Option Matrix, Trade and Quote (TAQ), OTC Corporate Bonds, Factset, BoardEX ,CISDM, Nastraq,v SEC Analysis and ESDS

The following slides showed data pertaining to whose decision it was to purchase – librarian of the Business School, a library committee in the Business School, the main University library, academic/research staff, other etc - , who manages the data, who pays – the Business Library, the University library, supplementary School money, shared – is there a charge back – nominal amount, percentage, on actual usage – restricted usage/ institutional spread - restricting access user categories, who provides training and support, how is value measured and by whom etc.
Some comparative findings:

• Who manages the accounts: for Business School Libraries, all managed exclusively by BSL – except one reported a “1” for non-library staff for management of WRDS: compared to BSL operating from within Ul, management more by “non-library staff”.

• Charge-back appeared to be constant across the three with almost no charge back occurring.

• In the training and support area, the BSL operating from within UL there was greater use of “Specialist staff not employed by library”, “Doctoral students/Academic staff” and “external providers” BUT BS Libraries used more “online support and database help desks” for all products compared to the BS within the University Libraries.

• Use of various measures to gauge value was fairly constant across the groups.

•Within the last several years, we have done more "joint venture" funding of some of these high end databases. I am currently of the opinion that my library budget is better spent helping to support these databases rather than buying books that no one uses.

•The Research Division pays for the subscription: Supplementary fund comes out of Faculty & Research Budget

•We subscribe (10 access accounts) to WRDS via the University we are affiliated with. They manage the account, we get an annual invoice. But the library services manager is the contact person to the university for any matters concerning WRDS

•So long as there is money we have been able to keep what we have. Faculty research support would trump any cancelation idea

•Internally we have had to justify (at a senior level) subs to apparently "overlapping" datasets in terms of the different outcomes and experiences that they necessarily serve. e.g. Bloomberg, Capital IQ and FactSet are end-user tools used in over 70% of investment firms worldwide and our students value the opportunity to experience these work place tools.

Comments: measures & value

- Some specific data sets are purchased with a faculty member’s research budget, although the library manages the contract
- For datasets with low usage, who uses it is more important than how many people use it.
- All available measures
- The decision does not depend on me but on a Faculty member and I don't know how he values the datasets.

Interesting questions…

In this time of "big data", social media and tracking transactions and collecting data in social media, what other types of research data sets are faculty and students getting access to, apart from the branded products that we purchase and license?

Other potential issues include hidden cost & support overheads we have encountered in maintaining the client software often used by these datasets on dedicated PCs (whether in-house or supplier) plus administering the monthly or quarterly invoicing. Also there is an emerging issue of double-charges for using data to which we have already subscribed on different platforms e.g. Capital IQ and FactSet on WRDS as well as the non-standard authentication used.

Many databases do not have adequate systems for counting users, time accesses, and data downloaded.

Pecha Kucha 3

Tomalee Doan – IMPACT

Instruction matters: Purdue Academic Course Transformation

Tomalee Doan is the Associate Professor of Library Science in the division of Humanities, Social Science, Education and Business at Purdue University. The goals and objectives of IMPACT were:

- Refocus the campus culture on student-centered pedagogy and student success
- Main focus on large enrollment, foundational courses
- Enable faculty-led course redesign with campus-wide resources including $10K incentive to participating faculty
- Network faculty through Faculty Learning Communities
- Base course redesign on best practices and sound research
- Grow and sustain IMPACT by adding new IMPACT faculty fellows annually
- Reflect, assess and share results to benefit future courses and students

They went to the office of the Provost and gained commitment of funding, a post of provost fellow and new learning spaces. They went to the Center for Instructional Excellence and created staff time for instructional development. The Center for Instructional Excellence (CIE) promotes innovative pedagogies and curricular synergies at Purdue University by serving as a support structure and advocate for continuous improvement in teaching, learning and service in combination with Instructional Data Processing (IDP) assessment. They made time for specific training from the educational technologists and provided general services for facilitating campus enhancement/development. They created better linkages for distance learners and new learning spaces and created better information literacy classes.

Instructors in the IMPACT program now work with teams of course and curriculum developers from the CIE, ITaP (Information Technology @ Purdue), & Libraries to redesign their courses. The faculty cohort is also part of a Faculty Learning Community. They developed a comprehensive assessment plan with help from DLRC (Discovery Learning Resource Centre). They created a Scholarship of Teaching & Learning output. Faculty Learning Workshops are a weekly series that will address 3 main topics:

1. What do you want to accomplish?

2. How do you want to approach it?

3. What methods and activities will you use to get there?

The workshops run for a semester and for each course, we assign a course redesign team of individuals from CIE, ITAP, and the Library. A course redesign will:

1. Have a plan that recognizes that the need of each participant and each course is different.
2. Include innovation, implementation, assessment and institutionalization which are critical to success.
3. Focus on integrating the Chickering and Gamson's "Seven Principles for Good Practice in Undergraduate Education."

The Provost Office contributed $1M to develop two new classrooms in Hicks Undergraduate Library which were built this summer. Now the library participates in other academic learning space project on campus (residence halls/honors college/center for student excellence and leadership). It participates in campus IT Advisory Council making recommendations for campus computing for students.

Pecha Kucha 4

Strategy reflection: the shift continues   Deb Wallace, Harvard Business School Knowledge and Library Services

Deb talked about the way her library service made strategic shifts in getting the library more and more integrated with the teaching of the Harvard Professors. The main aims of the Business School were:

- Organise the School's priority information
- Move to electronic products and services
- Support Global research and education
- Increase reach of faculty knowledge dissemination
- Harvard integration

They employed a new Executive Director, created five open positions, Harvard Library entered a transition – Knowledge & Library Services (KLS) Future State "expired". The Dean's priorities are innovation, intellectual ambition, globalisation, integration and inclusion. The reflection approach took them to initiate, identify, determine and execute a five point plan. At the start of the program, a team was formed, a plan made and a framework laid out to use a 4+2 formula to set the deliverables. First of all they assessed the situation – what was the current situation, its strengths and weaknesses, the guiding principles checked and customer trends understood. This was followed by discussions around mission, vision, priorities-intent, priorities and concerns. They aligned accountability looking at organisational design and build, then created measures around operational goals and objectives and rolled out implementation using a tracking system on deliverables.

Running alongside this, the KLS also made a plan to move to more electronic products and services. The status quo was 2.5X electronic vs. print expenditure, the Catalog of electronic information became an institutional memory and so they undertook information lifecycle management, following a similar 5 point plan. They asked themselves:
Why do we exist? - Mission. What are we going to do? – Vision. How are we going to do it? – Priorities. What works need to be done? – Goals/Roadmaps

The Baker Library as it currently was:

Microsoft Office-based research Faculty “papers”
Published record (articles, books
Archive on retirement
Administrative records on paper
Library skills: Information Literacy
Bibliographies; book trucks
Circulation
Collections in library stacks

Baker 2.0

Digital Scholarship research program management
Faculty hard drives, DropBoxes, ShareSites
Self-created content (websites, tweets, blogs)
Archive just-in-time; information lifecycle management
Administrative records in digital format
Informed Leader capability management
Curated digital course support materials
Discovery and knowledge dissemination
Digital repositories across the School
Virtual storage – servers & the cloud
Taxonomies and tagging
Librarians, MBAs, economists, statisticians, journalists, information architects

What KLS was trying to do was:

- Create a collaborative culture
- Design a flexible organization
- Strengthen their unique collections
- Establish best-practice services for managing information
- Continue to innovate and improve on their on-going work
- Promote a better understanding of who they were, what they did and the value they added to the KBS community
- Influence the strategy and implementation of the new Harvard Library

Reflections on our reflection

The 57 staff are divided between the Services team and the Infrastructure team. A consultant kept them on track. Only small steps could be taken as there was the day job to get on with at the same time. There was targeted outreach to partners and customers and a broad staff engagement in the process, a new leadership team was formed and they shaped a *new Knowledge & Library Services culture*.

There was senior HBS Management engagement and increased understanding. Timing of changes was critical and led into the budget cycle. The process itself was transformative. The KLS ended in an enhanced position during a time of extreme change. It was also important to stress that it was all done through reflection versus one of change – a continuation of strategic shifts.

They build the road as they travel…they have built key relationships, integrated mechanism, created a leadership team, formed an information management framework and have a Communication Plan.

Pecha Kucha 5

The Collaborative Curve: ROI for University of California Libraries. Laine Farley

This session aimed to cover the environmental challenges, ROI: how does it apply (or not)? How does CDL add value – to collections, to services, to applied research, to expertise and to entrepreneurship? The landscape is changing rapidly with an ever increasing number, size and diversity of content, ever increasing diversity of partners and stakeholders, decreasing resources and the inevitability of disruptive change in technology and institutional mission. The Library faced a reality which was an increase in researchers and increase in research publications against decline in budgets and journal expenditures rising. We were left with an exacerbated structural problem that requires a dramatic new solution.

> “**ROI instruments and calculations fundamentally do not work for academic libraries, and presents naïve and misinterpreted assessments of our roles and impacts at our institutions,** and our across higher education. New and rigorous qualitative measures of success are needed”
> James G. Neal, ACRL conference 2011

California Digital Library (CDL) operates at a current annual cost-equivalent of $58 per UC faculty, student and academic staff member. When narrowed to a focus on the University’s support of the 12000 UC Senate faculty members, CDLs services have a cost-equivalent of $1400 per FTE – 0.34. Similarly CDL’s portion of what the university spends on education per student $15820 on average amounts to less the one half of one per cent (0.46. %) of University expenditure.

With a core budget of about $14M, the CDL attracts an additional $18.5M annually in voluntary co-investments from campus libraries and uses the resulting $32,5 M pool of funds to deliver about $52M in direct benefits to 10 campuses, supports an additional $46M in measurable indirect benefits, and provides a technical platform and a leadership capability which fosters development of a host of service innovations that could not readily be supported by the campus libraries operating independently. It also adds value in cost avoidance – it offers a system wide platform using open source software, it is a development partner with the Public Knowledge Project and saves $500K per year in licence fees.

It adds value in services for campus libraries through aggregation: OAC, Calisphere, eScholarshp lead to stronger, more diverse content, contextual access, search engine optimization, A&I infrastructure + APIs for customizing.

It adds value qualitatively-

through staff – smart, dedicated, accessible, innovative, committed to collaboration, experienced, expert

through neutrality – facilitates collaboration and resource sharing among the UC campuses from a neutral position through leadership – National, international reputation and establishes digital library standards, a leader in licencing terms, preservation and web archiving, opensource development, e.gXTF

through innovation - provides a focus on innovation and future trends in digital libraries.

It offers a model for sustainable services. It offers curation – a focus on the entire information lifecycle. Technology and infrastructure is simple, flexible and adaptable. Services which are diverse, content which is agnostic and where sustainability is a must.

It also offers value for the Service landscape, developing specific technological advantages:

- Create, edit, share and save data management plans
- Open source creation add-in for Microsoft Excel
- Create and manage persistent identifiers
- Curation repository: store, manage, preserve, and share data
- Open access scholarly publishing: papers, journals, books, seminars & more
- An infrastructure to publish and get credit for sharing research data
- Digital object and finding aid display and contextualization platforms.

What is the ROI on Collaboration for the CDL?

- Create collective impact through partnerships and networks
- Share wealth (resources), expertise and power with peers
- Share leadership throughout networks
- Master the art of adaptation
- Modify tactics, respond quickly, innovate constantly
- Engage in both direct service and advocacy
- Meet immediate needs and help reform larger systems

There are new roles for librarians. They are becoming consumers on behalf of users expanding into intermediary and aggregation roles, serving as publishers, embracing research and developments, advancing entrepreneurial strategies, advancing as educators and serving as information policy advocates.

Friday 20th April afternoon finished with individual groups – ABLD, EBSLG and APBSLG heading off individually, to have their Annual General Meetings, before heading back to our accommodation to get ready for our finale dinner. We were driven up into the hills north of San Francisco to a stunning vineyard, where we dined and summarised what we had got from the last few days.

The conference was enlightening - the University libraries in the United States are mainly bigger, better funded, attracting much sponsorship from alumni and better staffed. New technologies tend to happen out there before they do elsewhere, but we all shared the same ethos and values regarding information provision. We all face the same problems regarding database suppliers, price increases, speed of technological changes, growth in academic programmes, but we generally found ways of working together to find solutions to those problems. The big thing for me too, is new contacts and a third LIS_ group to interact with by email. I came back with lots of new ideas to nurture and develop myself. Some are already in place having made some major changes to my website. I have also had two members of the US ABLD group email me to arrange visits to see me, the Business School and the main University library Edinburgh. Online communications have grown and I now have lots a new set of contacts I can use to liaise with on library issues, most often with regard to database suppliers and to use when arranging future visits.

D Morrison
26 April 2013