Stepping Through the Open Door
Forum on New Modes of
Information Delivery

SUMMER 2007

Compiled by: Mark R. Nelson, Ph.D.

Stepping Through the Open Door
*Forum on New Modes of
Information Delivery*

SUMMER 2007

SPONSORSHIP:

The enclosed document captures outcomes from the Forum on New Modes of Information Delivery held March 5-6, 2007, in Denver. The Forum was sponsored jointly by the Association of College and Research Libraries (ACRL), EDUCAUSE, and the National Association of College Stores (NACS). This document is intended for use by the associations with their members and other constituents.

ACKNOWLEDGEMENTS:

Once again, thank you to all of the individuals who participated in the Forum. Special thanks to the conference planners from each of the associations, and to Phil Goldstein and the other facilitators for the breakout sessions. Special appreciation also to ACRL, EDUCAUSE, and NACS for providing the leadership and funding for this event.
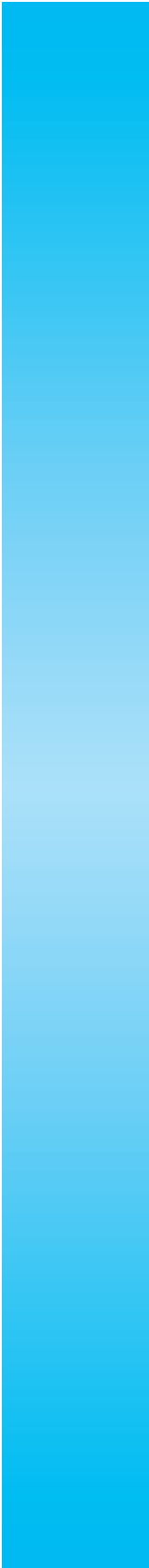
QUESTIONS:

Questions about this document or the Forum may be directed to Dr. Mark Nelson, Digital Content Strategist, NACS (mnelson@nacs.org).

Contents

Executive Summary

On March 5 and 6, 2007, the Association of College and Research Libraries (ACRL), EDUCAUSE, and the National Association of College Stores (NACS) jointly hosted a meeting on New Modes of Information Delivery in Higher Education. Forty-eight association members and staff were invited to participate, representing various perspectives and areas of expertise across the three sponsoring associations. Over two half-days, invited participants progressed through a set of team-based sessions that focused on the future of digital content and other modes of information delivery in college stores, libraries, and information technology (IT) units. The Forum exceeded our expectations with respect to some of the original objectives. This document provides analysis and summary of the discussions that occurred as part of the jointly-hosted event.

New Perspectives

Many participants noted how their perspectives of the other functional areas changed during the discussions. For example, non-college store participants commented that they now had a new appreciation or understanding of the college store manager as a potential colleague. Store participants observed that the event was an eye-opener in terms of new ways they could work with librarians and IT staff. A few participants stated that their perceptions of each other's areas have been a barrier to collaboration, but that they learned that some of their preconceptions were not accurate. In concluding remarks, Mary Ellen Davis, executive director of the ACRL, described the big take away from the event as a lesson in what we really have in common and how much potential there is for collaboration.

New Ideas for Local Action

Of special note was the interest expressed by many participants to continue the discussion at their campuses. Numerous specific and actionable recommendations arose for continuing the collaborative dialog at institutional levels. Just one day after the event, volunteers from each area expressed a willingness to participate in implementing some of these recommendations. They ranged from easy first steps to bold steps for future collaboration. Examples include:

- Ask the store manager, library director, or CIO to lunch to discuss the forum outcomes.
- Ask representatives from the other areas to participate in internal meetings and planning sessions.
- Change local job descriptions to require more collaborative skills.
- Share information about the forum using materials (video/podcast) created nationally.

New Vision for National Collaboration

One of the most interesting outcomes from the Forum was the common theme or shared vision of a future in which college stores, IT units, libraries, and other campus constituencies work together to implement a unified portal that integrates our knowledge sets to benefit students and faculty in a resource-efficient manner. Early stages of that vision could focus on areas such as copyright compliance, intellectual property, and digital rights management. This could begin with production of custom course materials, to avoid students purchasing course packs with materials already licensed by the library, and it could evolve into a new shared business model across areas, and with other constituencies. Several specific action items were suggested for achieving this vision at the national level. A few of these recommendations include:

- Identify demonstration projects and best practices that showcase collaboration.
- Create a joint task force among the associations to continue moving the discussion forward.
- Pursue funding from national foundations to continue the discussion.

Introduction

Why hold a forum on new modes for the delivery of information in higher education? The concept of a forum on this topic evolved from interest of several higher education associations. Conversations between ACRL, EDUCAUSE, NACS, and other associations and individuals led to the recognition that there are many initiatives related to new modes of information delivery that will affect higher education more broadly than the membership of just one of these associations. A common theme underlying many of these initiatives is the potential for campus constituencies—such as the college bookstore, the campus IT unit, the library, and possibly even the faculty and students—to take advantage of opportunities that redefine traditional institutional roles. There was also recognition that the many members of our respective associations are approaching these initiatives from different perspectives and interests, generating knowledge and experience that might best serve higher education if shared more effectively among stakeholder groups.

While these topics have appeared in many forums, there is no group, organization, or institution that has established a common set of recommendations to address the related opportunities for higher education. We propose that there are a number of questions that higher education must address, including:

- As the global intellectual infrastructure changes, how will the roles of institutional func-tions that traditionally served as the information brokers and conduits on campus change?
- How has the way we are getting information changed, and how will that change the way we are providing it to higher education's stakeholders?
- What is the value proposition for each of our constituents in a world of evolving modes of information delivery?
- How do we reconceive ourselves and further strengthen our campus relationships, par-ticularly with faculty and students?
- As modes of information delivery continue to evolve, how will our existing service models change and what new opportunities will arise?
- Are there ways for our various constituents to collaborate to deliver information and services to our users?

The future is as yet undetermined and we have a great volume of knowledge between us. These factors provide an "open door of opportunity"—if we can only figure out how to step through it. For this reason, ACRL, EDUCAUSE, and NACS convened a forum to bring focused attention to the topic and to cooperatively develop recommendations and action items that will benefit the larger higher education community in the context of an increas-ingly connected world.

Common Interests in the Future of Information Delivery

Higher education and the environment in which it operates are in an age of transformation. Changes in technology, student and parent expectations, teaching and learning, and research create new opportunities and new challenges for many institutional departments. This is particularly true for higher education professionals working in libraries, college stores, and IT units as they all have roles providing access to information that is multiplying at exponential rates. The explosion of information, the increasingly competitive domain of production, and electronic ascending over print combine with campus budget constraints to create challenges for these three units in determining how best to serve students and faculty. This changing environment casts a different light on the missions of libraries, campus stores, and IT. On the one hand, one could see these three in a contentious race as each group attempts to assert their place in the business of providing information. On the other hand, visionary leadership and collaboration among the three yields the potential for richer, far-reaching, and more integral roles in supporting higher education's core mission of research and education.

Libraries

Libraries see an opportunity to serve the emerging and unmet needs of students and faculty that arise in the changing environment. Transitions in the way information is produced, disseminated, and accessed provide valuable opportunities for libraries to emerge as even more central and vibrant resources for the academy. Libraries have long helped their institutions adopt digital technologies but the information explosion has changed expectations about the creation and use of knowledge. As libraries increasingly provide seamless access to content through licensing agreements for databases, journal articles, and other e-resources, they have become increasingly transparent to users. To redefine and reaffirm their role, academic libraries must assert themselves more actively and seek out new partnerships.

College Stores

College stores see a rapid evolution in the course materials they provide to campuses. Stores are monitoring the emergence of new forms of digital content and new modes of information delivery for course materials, such as textbooks. While outsourcing of stores has reshaped the college store landscape over the past decade, new methods of delivering content could have an equal or larger effect on college stores in the decade to come. New business models—in which publishers sell licensed course materials directly to students or institutions—change the locus of transactions. At the same time, new technologies provide stores with new opportunities to streamline operations and provide new products and services that better meet the needs of learners and institutions through greater choice at reduced cost.

IT

IT units increasingly provide information delivery functions on the academic campus, particularly as faculty look toward more uses of technology in the classroom and learning management systems grow in use and popularity. As the volume of content continues to grow in a range of linear and non-linear digital formats, increasing pressure is placed on campus networks to provide reliable and secure access to that content. Identity management and other technologies will be critical for enabling student access to authentic content, and balancing principles of fair use with copyright holder concerns. As the frequent home of not just academic computing, but also instructional technology, IT units must continue to help faculty make full use of available resources. As content is increasingly associated with the individual rather than the institution, as we see for example in trends with e-mail accounts among students, IT units may move out of the information storage and delivery business and into new roles that are not yet fully defined.

Jointly, all three of these areas recognize that they have new responsibilities and opportunities when it comes to working together and serving the needs of students and faculty. As content is increasingly delivered in digital form, universities and colleges must ensure that diverse student populations can both access and afford this content. For faculty, these changes in content forms and delivery mechanisms mean helping to introduce new technologies and information sources into the classroom. As a result, these changes may mean new roles for helping faculty not only work with different forms of content, but seek out the best types of content that match student learning styles and capabilities. Staff members providing traditional institutional support have the opportunity to collaborate with or become engaged members of academic teaching and research teams. An institution's ability to leverage the shared knowledge of developments in information access that span current functional barriers will be a critical institutional asset in the coming decade.

Opportunities for Collaboration

A primary impetus for this forum was to identify opportunities for collaboration among the parties present. Working in subgroups, participants generated many ideas on ways that college stores, IT units, and libraries could collaborate to benefit stakeholders. Despite the volume of opportunities identified, a few themes and common ideas surfaced in each of the subgroup discussions.

Developing a "Unified Knowledge Portal"

One opportunity for long-term collaboration is the pursuit of a common environment for digital materials, dubbed a "Unified Knowledge Portal." Such an academic resource portal could be a national opportunity as much as a local one. By creating an individually customized online course-tool experience, content could be combined with social book-marking and tagging by students and faculty (e.g., students who earned an "A" cited x in their final paper). As course material discovery is codified, students could go to one place for all course materials–whether those resources are available for free or for pay. A key attribute of this environment is the ability to provide access to any course-related content (open access, commercial, and local) wherever the student might be. Current options (e.g., learning management systems, e-reserves, physical locations) do not provide the "one stop shopping" experience students increasingly expect. Instead, students and faculty must seek out available content through multiple portals and tools on and off campus. By moving toward a more integrated and interoperable working environment that is agnostic of content source, resources can be better managed and stakeholders can be better served.

Educating and Supporting Students and Faculty

A related initiative would aim to provide information resources and awareness to students and faculty, and could include both physical and virtual spaces. As the volume, forms, and formats of digital content increase, questions of preserving it and maintaining access to it become more challenging. This requires a rethinking of people, equipment, and spaces in libraries, college stores, data centers, laboratories, and other locations both on and off campus; adding discussion spaces, gathering opportunities, and pulling in other academic and student support services. IT units, libraries, and college stores all have an embedded presence among faculty designed to assist with information delivery from different perspectives. As a result, no one person or group on campus may know what resources are fully available in either physical or digital form. Better knowledge management across campus communities could produce more effective and efficient use of limited resources.

Creating Efficiencies Across Departments

Efficiencies could be further gained by streamlining some activities across departmental areas. Examples might include sharing content purchasing and acquisition functions among the areas, and developing best practices for electronic commerce. Many subgroups recommended developing better collaboration on custom publishing materials, also known as course packs, that faculty use in classes. A mechanism is needed to verify that students and institutions are not paying for the same content twice—once at the library and once in a faculty course pack. Working together on this issue could result in savings for students.

As barriers are overcome, the boundaries between functions may change, creating new organizational constructs, roles, and services that better fulfill institutional missions. One example might be an advisory service for instructional content that combines social-networking tools with authoritative knowledge of campus experts in libraries, college stores, faculty, and elsewhere. Changing relationships between campus communities and external organizations, such as publishers or technology vendors, will require better knowledge sharing and working arrangements among libraries, college stores, and IT units.

Copyright and Intellectual Property

Education in the areas of digital rights management, copyright compliance, and intellectual property rights provide prime opportunity for collaboration. A targeted outcome could be a portal for faculty, staff, and students on content areas and related intellectual property principles. Engaging in such a collaborative effort requires working through differing perspectives on intellectual property rights, the nature of copyright, and the application of "fair use." Establishing acceptable boundaries and policies for open access versus commercial content.

For collaboration to work, better communication mechanisms must be developed. More voices are needed. Higher education or individual institutions should create a venue to bring together libraries, college stores, academic and administrative computing, legal counsel, centers for teaching and learning, and campus printing. In addition, they must engage those producing the content: faculty researchers, authors, editors, university presses, and other groups. The goal is to find the intersection points at which institutions can provide support for student learning in a resource-efficient way.

Continuing the Dialogue

As one forum participant commented, the big take-away from this event was a realization that all three groups share similar concerns and overarching goals—resulting in great potential for collaboration. Suggestions to continue the dialogue through multiple venues and formats echoed strongly among the working groups and in participant feedback to the event. Recommendations on this theme ranged from the simple (e.g., arranging coffee or lunch on campus with counterparts) to the ambitious (e.g., pursuing national grants). What is clear is that some steps at both institutional and national levels should be taken to continue the dialog that began at the Forum.

One of the more aggressive and interesting recommendations made by working groups is pursuit of one or more national leadership grants. Objectives of the funding proposals would go beyond disseminating or communicating outcomes of the initial forum. On the communication side, funding could be used to bring together additional groups to continue the dialog and establish a mechanism for communicating further progress. Further dialog could be used to better scope out the common points of intersection and develop a new knowledge management model among areas. Funding could be used to execute a project that breaks the hegemony of proprietary approaches and move toward a collaborative model of content aggregation and management. It could be used to explore and articulate transformative business models that cross functional areas. Using a target vision of what a total end or ideal solution might look like, funding could be used to support institutions engaged in implementing parts of that vision and disseminating the information learned.

Numerous suggestions arose for continuing discussion at lower levels of commitment. Using modern social networking tools was recommended, including a collaborative blog or jointly sponsored webcasts. Joint conference presentations or cross-membership in topical committees of each association were additional recommendations at the national level. Locally, individuals could convene conversations on campus about opportunities for collaboration, sharing ideas, and finding small projects to work on together. Reconciling differences between libraries and college stores on copyright could be an early opportunity area for working together.

To make future collaboration work, some barriers must be overcome. The most difficult barrier may be a perceptual one. College stores and libraries have perceptions regarding respective motives that may be based more on stereotypes than actual fact. For example, "The college store only cares about profit," or "Libraries want to give everything away for free regardless of intellectual property rights." Such perceptions affect trust and must be addressed to develop the trust necessary for effective collaboration with other units. Collaborative relationships with other campus departments are not always seen as a priority, however. Changes in public policy may be an opportunity to drive the relationship

to a higher level of importance and may necessitate greater collaboration. For example, growing state and federal legislative attention on the high cost of higher education, particularly for course materials, could lead to new collaborative efforts between IT, libraries, and college stores to implement new technical solutions to this challenge.

Despite possible barriers, libraries, IT units, and college stores must look at how to reform value and services to meet future institutional needs and expectations. New modes of information delivery are here and have growing adoption rates. The different areas need to learn new languages or develop a common language for managing the environmental changes. Doing so will ensure that the door remains open to pursuing new collaborative opportunities as they arise.

Concluding Remarks

The Forum on New Modes of Information Delivery was a good first step toward a new understanding between functional areas. It was perhaps as useful in illuminating what the different institutional areas do not know about each other as it was in highlighting some of the common ground. As one participant described:

> "We had to discover much during the course of our conversations and often spent time in learning about another area in order to then make the discussion work. I'm sure that could have easily added another day to the conference and given this was a first attempt, I was extremely impressed with our progress in a relatively short period of time."

As a first attempt, this Forum was able to define the "open door" of opportunity that lies in the intersection of our different campus functions. As another participant noted, "All three groups are dedicated to serving their university's mission. All groups have limited resources and, by leveraging resources through collaboration, could improve results."

Participants gained a clearer understanding of the need to collaborate across all levels of our institutions to be successful in the next decade and beyond. Two attendees noted that different dynamics among participants changed some old discussions about the future in a positive way, because with a new player at the table old assumptions were re-evaluated or re-examined as they were explained to a group with different perspectives and experiences. More participants identified an immediate need to plug into other campus departments, in addition to faculty and students, in a new way. Again, in the words of one of the participants, "There is much to do... together. As is usually the case, we have more power together, than separately, to forge change in our world of higher ed."

While ACRL, EDUCAUSE, and NACS may have "to do" lists with next steps for pursuing outcomes from the Forum, some of the participants have already gotten started. One of the librarian participants is working on an article for ACRL's *College & Research Libraries News* about the collaboration among the access librarian, the bookstore, the Center for Teaching & Learning, the IT staff, and faculty on the topic of pathways to course-related content. Another participant has already met with the bookstore staff and they are working on a textbook loan program for students in need (non-digital, but important). She also has an upcoming conference session to present on "Innovative Collaborations: Bookstore, Libraries, and IT Serving the Next Generation of Students." Other participants have reported on campus meetings they have had with different stakeholders, and at least three participants have offered to assist NACS in the pursuit of grant funding to continue the conversation and take it to the next level of engagement.

As a final participant quote, one individual noted that, "There is a general feeling that technology is a juggernaut, which means that those of us who are trying to steer the technology need to make clear that it's time to band together and take charge, to the extent that we can." In many ways this quote summarizes the goals and the outcomes from this event. Technology and related changes to modes of information delivery in higher education are changing rapidly. We have an opportunity to work together to help direct those changes to our mutual benefit and the benefit of the institutions that we serve. The outcomes of the forum may have been mostly social, with a realization for the necessity for collaboration, understanding each other's jobs, and hearing each other's point of view. Some vision of future information delivery models were discussed, such as the idea of a unified knowledge portal. This forum identified several ways in which we can collaborate to create a better future–but was only the first step in approaching the open door of opportunity and stepping through to the other side.

Participant List

The following individuals participated in the Forum on New Modes of Information Delivery:

Bob Albrecht, Senior Fellow, EDUCAUSE Center for Applied Research (ECAR)
Nancy Allen, Dean and Director, Penrose Library, University of Denver
Susan Allen, Chief Librarian, The Getty Research Institute
Todd Anderson, Director , University of Alberta Bookstore, University of Alberta
D. Scott Brandt, Associate Dean for Research & Professor of Library Science, Purdue University

Brian Cartier, Chief Executive Officer, NACS
Mary Case, University Librarian, University of Illinois-Chicago
Bradley Daigle, Rare Materials Digital Services, University of Virginia
Mary Ellen Davis, Executive Director, ACRL
Thom Deardorff, Coordinator for Access Services, University of Washington

Paula Dempsey, Coordinator of Document Delivery, DePaul University Libraries, DePaul University
Linda S. Dobb, Executive Vice President & Secretary to the Board, Bowling Green State University
Tony Ellis, Director of Education, NACS
Chris Ferguson, Associate Provost, Information & Technology Services, Pacific Lutheran University
David Free, Public Services Librarian, Georgia Perimeter College - Decatur Campus

Nancy Fried Foster, Lead Anthropologist & Co-Manager of the Digital Initiatives Unit, University of Rochester
Paul Gandel, VP for Information Technology/CIO, Syracuse University
Phil Goldstein, Fellow, EDUCAUSE Center for Applied Research (ECAR)
Marilu Goodyear, Professor, Public Administration, University of Kansas
Kathleen Grace¸ Director, Swarthmore College Bookstore, Swarthmore College

Diane Graves, University Librarian, Trinity University
Karen Hernandez, Director of Auxiliary Services, Normandale Community College
Richard Katz, Vice President, EDUCAUSE
Chuck Kissel, Director, Titan Shops, California State University, Fullerton
Ronald Larsen, Dean, School of Information Sciences, University of Pittsburgh

Kara Malenfant, Scholarly Communications & Government Relations Specialist, ACRL
Dennis Mekelburg, Associate Director, Arizona State University Bookstore. Arizona State University
Terry Metz, VP Library & Info Services, Wheaton College
Jackie Middleton, Director, Florence O. Wilson Bookstore, The College of Wooster
Pamela Mills, Director, CU Book Store, University of Colorado

Mark R. Nelson, Digital Content Strategist, NACS
Michael Neuman, Sr. Assoc. for Scholarly Information Initiatives, Georgetown University
Ed Schlichenmayer, Senior Vice President, NACS
John Shank, Instructional Design Librarian, Penn State Berks
Gary Shapiro, Sr. VP of Intellectual Properties, Follett Higher Education Group

William Simpson, President & General Manager, UConn Co-op, University of Connecticut
Pam Snelson, College Librarian, Shadek-Fackenthal Library, Franklin & Marshall College
Melanie Sparks, Director, University of New Mexico Bookstore, University of New Mexico
Gene Spencer, Associate VP for Information Services & Resources, Bucknell University
Denise Stephens, Vice Provost for Information Services and CIO, University of Kansas

Roy Tennant, User Services Architect, California Digital Library, University of California
Julie Traylor, Director of Planning & Research, NACS
John Turk, Director, UCSD Bookstore, University of California, San Diego
Ron Yanosky, Fellow, EDUCAUSE Center for Applied Research (ECAR)