

**TO:** ALA Executive Board

**RE:** New - Robert L. Oakley Endowment

**ACTION REQUESTED/INFORMATION/REPORT:**

To establish the Robert L. Oakley endowment fund

**ACTION REQUESTED BY:**

ALA Endowment Trustees

**DRAFT OF MOTION:**

To approve the acceptance of funds for the establishment of the Robert L. Oakley endowment fund.

**DATE:** October 14, 2008

**BACKGROUND:**

At the behest of Mrs. Robert Oakley and the Washington Office, ALA was approached about establishing a memorial endowment for Mr. Robert L. Oakley. Mr. Robert L. Oakley was an expert on copyright and intellectual property law. He also served as the director of the law library at Georgetown University, the fourth largest in the country, since 1982. He past away on September 29, 2007.

The purpose of this endowment is to award a scholarship of \$3,000 in the form of a study grant to support research and advance the study for librarians in their early to mid-careers. Applicants will be interested in intellectual property, public policy, copyright and their impacts on libraries and the ways libraries serve their communities.

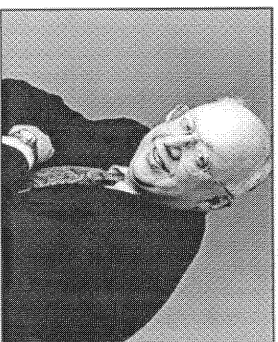
In an effort to memorialize him via a scholarship in copyright research, there have been a number of fundraising efforts and pledges to get things started. To date (9/20/08) a total of \$42,559 had been collected in the form of cash (\$27,559) and pledges (\$15,000). The top gifts are from the American Association of Law Libraries, LexisNexis, Paul Vestigo and Winston Tabb. In August of 2009 the ALA Development Office, HRDR and Mrs. Oakley will evaluate the endowment to determine if a scholarship can be awarded in 2010.

Attachments

**Robert L. Oakley, 61:**

**Georgetown Law Librarian**

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Robert L. Oakley, 61, an expert on copyright and intellectual property law who had been director of the law library at Georgetown University since 1982, died of cardiac arrest Sept. 29 at Shady Grove Adventist Hospital in Rockville. He had complications from a fall in August.

Mr. Oakley, who was also a law professor at the university, oversaw massive growth in the library's holdings as well as the construction of two law library buildings.

He worked to increase the library's collection of international law materials, especially on matters such as international trade and human rights as well as documentation from such organizations as the United Nations and the International Court of Justice in The Hague.

According to the university, which awarded Mr. Oakley a prize for administrative excellence, Georgetown has the fourth-largest law library in the country.

Mr. Oakley was an adviser to the Library of Congress on copyright law and the technology-driven changes to the field. He was a former board president of the American Association of Law Libraries and had been serving as its Washington affairs representative at the time of his death.

Mary Alice Baish, associate Washington affairs representative for the libraries association, said Mr. Oakley recently represented U.S. library interests at meetings of the World Intellectual Property Organization in Geneva and focused on the role of a balanced copyright framework essential to any library worldwide.

Baish said in a statement: "As an expert in copyright law, Prof. Oakley was dedicated to preserving the historic balance between copyright owners and users for the digital age."

Robert Louis Oakley, a Germantown resident, was born in New York City and raised in Utah and on Long Island, N.Y. He was a 1968 graduate of Cornell University and a 1976 graduate of its law school. He received a master's degree in library science from Syracuse University in 1972.

Before joining Georgetown, he was an associate law librarian at Cornell as well as law library director and associate professor of law at Boston University.

He was a ham-radio operator and enjoyed folk dancing. His marriage to Madeleine Cohen Oakley ended in divorce.

Survivors include his wife of two years, Barbara DesRosiers Oakley of Germantown; two children from his first marriage, Esther Oakley of Germantown and Daniel Oakley of Rockville; his mother and stepfather, Allese and Paul Vestigo of Gresham, Ore.; two half brothers; and two stepbrothers.

**Article citing-Adam Bernstein, Washington Post, October 12, 2007**

# ALA American Library Association

## ALA Scholarship and Study Grant Scholarship Application Form

### 1. Name of the Scholarship or Study Grant

Library Copyright Alliance/Robert L. Oakley Memorial Scholarship in Copyright Research  
(aka LCA/Robert L. Oakley Memorial Scholarship in Copyright Research)

Type: Endowment

Scholarship Award Amount: \$3,000 per year

### 2. Definition, Purpose, and Criteria of the Scholarship of Study Grant

The scholarship is designed to support research and advance study for librarians in their early- to mid-careers who are interested and/or active in the fields that Bob Oakley was expert in— intellectual property, public policy, copyright and their impacts on libraries and the ways libraries serve their communities.

Funds maybe used for equipment, expendable supplies, travel necessary for the conduct of the research, conferences, release from library duties or other reasonable and appropriate research expenses. In general, priority is given to an individual or teams of individuals.

The intent of this endowment scholarship is to encourage and expand interest in and knowledge of these aspects of librarianship as well as bringing the next generation of advocates, lobbyists and scholars to the forefront with opportunities they might not otherwise have.

### 3. Number and Frequency of Scholarships or Study Grants

Ideally, at least one scholarship would be made each year. If there is sufficient funding, the review committee may choose to award more than one scholarship each year. The scholarship will be awarded at ALA Annual Conference following such time as is necessary to receive sufficient monies to fund to support the scholarship.

### 4. Selection of Jury or Review Committee

The review committee will be made up of the members selected by the Library Copyright Alliance, with one representative each from the American Library Association, the American Association of Law Libraries, the Association of Research Libraries, the Medical Library Association, and the Special Libraries Association. ALA Washington Office will oversee jury selection.

If the composition of the LCA changes over time, the review committee should be made up of one and only one representative from each member association. The review committee will meet electronically, as well as virtually, when conducting the review process.

## **5. Applicant Submission Requirements and Deadlines**

Applicants should provide a statement of intent for use of the scholarship funds. Such a statement should include the applicant's interest and background in intellectual property, public policy, and/or copyright and their impacts on libraries and the ways libraries serve their communities. The statement should include information about how the applicant and the library community will benefit from the applicant's receipt of scholarship. Statements should be longer than 3 pages (1000 words). The applicant's resume or curriculum vitae should be included in their application.

Applications should be made online in Word document format. Applications should be received by March 1.

Awardees may receive the scholarship up to two times in a lifetime.

If over time, it becomes necessary to adapt the terms of the scholarship to accommodate changing conditions, a committee made up of the same constituents as the review committee will make recommendations to the ALA Executive Board and Library Copyright Alliance, which together will have the authority to make adjustments as necessary to continue to make a meaningful scholarship that honors the Oakley family's intentions.

The Office for Human Resource Development and Recruitment will administer this scholarship.

## **6. Screening of Candidates/Review of Applications**

The review committee will screen all applications for the following:

- Relevance and timeliness of proposed research/use of funds.
- Likelihood that the research/intended use of the funds will meet the applicant's stated objectives.
- Likelihood that the research/intended use of the funds will benefit the library community and library users.
- Uniqueness and/or critical impact of the proposed research/use of funds.

Majority vote of the review committee will determine the awardee(s).

## **7. Presentation of the Scholarship or Study Grant**

The scholarship will be announced and made at the ALA Annual Conference each year. The awardee(s) is not required to be present at the ALA Annual Conference. However, if awardee(s) should attend the ALA Annual Conference, then special efforts will be made to recognize the awardee(s).

## **8. Amount, Form and/or Type of Scholarship**

The standard scholarship amount will be \$3,000. For individual applicants, a check for the full amount will be issued. For team applicants, the scholarship amount will be divided equally among the members or might otherwise be designated as part of the application process and each will be issued a separate check.

At its discretion, the review committee may opt to split the scholarship between multiple recipients, but no scholarship shall be less than \$1,500 or more than \$3,000. (These numbers may be adjusted for inflation and cost of living over time.)

#### **9. Source of Funding or Donor Name**

Minimum requirement of \$10,000 for ALA endowment was met in June 2008 through tax-deductible gifts contributed by individuals, associations, and corporations in memory of Bob Oakley. As of June 2008, the current balance in the ALA Development Office holding account is \$14,375. Following approval by the Scholarship Committee, the ALA Endowment Trustee will review, take action and forward to the ALA Executive Board.

At minimum, \$110,000 or more is required to annually award a \$3,000 scholarship from the interest of the endowed scholarship's principal. A two-year fundraising plan seeking further tax-deductible contributions has been developed by the ALA Development Office. If the required principal amount has not been raised by July 2010, ALA, LCA and the Robert Oakley family have agreed to meet and discuss options regarding the future of the scholarship and the endowment fund.

This endowment scholarship supplants the previous pass-through scholarship, The Library Copyright Alliance/Robert L. Oakley Memorial Scholarship Fund, established at the 2008 Midwinter Meeting in Philadelphia.

#### **10. Contact person**

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