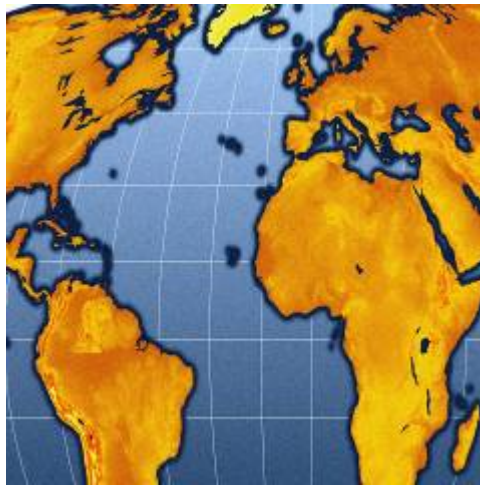


Association of Research Libraries

Preparing for the Future Scenario Planning Process



Findings from Internal Data Gathering

SUMMARY

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Introduction

Scenario planning is a strategy-related methodology employed by many organizations to test their long-term assumptions and explore the uncertain landscape of their future marketplace. As such, the process is designed to make deeply held assumptions and beliefs explicit and to test those beliefs and assumptions against the critical uncertainties facing the organization. The resultant scenarios provide a context through which to monitor the external environment in which the organization operates.

Association of Research Libraries (ARL) has begun a scenario planning exercise for its members that will be used to create a set of scenarios in which each member will be able to engage the leadership of their organization in a strategic conversation.

The first step in this process is the defining of the strategic focus for the scenarios and strategic conversation to follow. The strategic focus is uncovered through a series of internal interviews, focus groups and surveys of the key constituents. The data gathering is designed to explore and uncover the core strategic questions on the minds of key decision makers as they consider future challenges and opportunities that may face their organizations.

In April and May of 2010, Stratus and ARL conducted interviews, focus groups and a survey of ARL members and external thinkers on the future of research libraries and the strategic challenges they face. This report is a summary of the findings from that process, including a draft strategic focus that captures the scope of thinking of the ARL membership that participated in this effort.

The questions posed were designed to draw out key strategic questions on the minds of decision makers, perspectives on future success and failure, dynamics and forces external to research libraries and the institutions in which they reside, and perspectives on the distinctiveness of research libraries in the marketplace or research, information, and higher education.

This document can be skim-read in about 15 minutes, but we urge you to take a little longer to read it carefully. Reflect on what the main messages are. Does this document articulate the strategic questions and issues as you see them? Does it raise issues that you haven't previously thought of? Finally, remember that this document serves merely as a starting point for the conversations that will ensue over the coming months.

Summary of Findings and Strategic Focus

During the internal data gathering process, we have strived to understand the strategic questions on members' minds and the wide range of external dynamics of change that are changing the research library environment. The main objective of the data gathering was to define a strategic focus for the scenario planning process that would be relevant to the wide range of organizations that are members of ARL.

In the more standard situation in which one organization is undertaking a scenario planning process for itself, this is a challenging process as key decision makers have a wide range of perceptions on the future of the organization and the strategic imperative. With a scenario process for multiple organizations, the process is that much more complex as the goal is to create relevancy for all, but to not allow the strategic focus to be too broad and thereby ill defined to be useful in the scenario development process.

Through the internal data gathering process, the following strategic focus emerged:

How do we transform our organization(s) to create differential value for future users (individuals, institutions, and beyond), given the external dynamics redefining the research environment over the next 20 years?

The term, “we” refers to the ARL member research libraries. “Our organization(s)” was captured in both the singular and plural as member libraries shared an interest in both individual strategic planning, as well as, collaborative strategic planning.

“Transform” is a term that carries a legacy. The context of this word as applied here refers to the opportunity for member organizations to re-define themselves as a means of maintaining and growing differential value in the market. That being said, it is important to note that research libraries are all at different points in their individual evolution.

Everyone that shared insights with ARL brought up concerns about maintaining and or building relevancy that could be sustained and valued by users. Sustained value by definition must have some differentiating characteristic that is uniquely valued by users to be sustained over time. As such, the terminology “differential value” seems to most accurately capture the strategic imperative most frequently focused on by member organizations.

Value is always for the customer, or in this case the user. Members discussed how the user group for research libraries was changing and expanding. As such, we chose to clarify the focus on “future users.” Some members focused primarily on the parent institutions, others on individual users. The term “future users” includes these two critical stakeholders and is not limited to future possibilities that may take us beyond our current thinking.

A wide-range of “external dynamics” were shared during data gathering that can be found within this report. These external dynamics will be explored during the scenario development workshop and woven into the scenario narrative content.

“Research environment” is deliberately selected as a manageable scope. It allows for the consideration of the broad number of dynamics impacting the entire process of research, instead of “research and learning environment” which becomes unmanageably broad. However, it is important to note that although this scenario exercise will not focus on the full set of dynamics that are changing the future of learning, learning and its critical role in the research process are considered part of the “research environment.”

The time horizon for this exercise will be 20 years or from today out to 2030, a generation into the future. The time horizon defines the end state of the scenarios. The ARL 2030 scenarios will allow the members the opportunity to suspend disbelief and stretch beyond conventional wisdom. Although the scenarios are far into the future, the planning that each member organization will conduct using the scenarios will be for the next 1 to 5 years of time. This process will be explained in the Scenario Planning Tool Kit to be developed later this year to be used by the ARL members.

Critical Uncertainties Facing Research Libraries

Although this list is by no means exhaustive, several key areas of critical uncertainties were shared during the interview process. At the start of the scenario development workshop scheduled for June, we will expand upon this list with additional social, technological, economic, environmental, and political uncertainties.

What will be “research” and how will it be done?

The definition of research and scholarly work is unclear and changing as new techniques and tools are developed that lead to new and enhanced abilities to connect, analyze, and create information and knowledge.

Representative Quotes:

“When students and faculty are doing what they refer to as ‘research,’ what actual behavior does that really entail?”

“Looking out 3 to 4 years, who defines what constitutes research?”

“What is the current state of norms and mythology around the term ‘research’ that allows this to be true: anyone has the right to create and label something knowledge and research and hand off the collection, protection, and preservation of it forever to a third party?”

“What will the collection of knowledge be in the future? The definition of knowledge is difficult. Knowledge is a morphing thing. It is unclear what it will become.”

“What does scholarly communication look like in the future and how do researchers access information and data?”

What will be different about users and their needs?

Who the future users will be and what they will need is unclear. Changing technology platforms for scholarly work, communication and knowledge creation continue to impact who is a user and the form of access, processes and the product of user activity.

Understanding the user is critical to developing distinctive value offerings for the market place.

Representative Quotes:

“Demand for information by researchers and students will continue to increase. They will want things electronically, easy to use, easy to manipulate. Information shifts into a utility.”

“How will people want to access information, how will they want to read that information?”

“What will our users want from a library? This would let us chart a course for providing those types of services/resources and how we need to organize and to staff to meet those needs.”

“Which of our constituencies need us most and why? My explanation: Resources are scarce and need to be used strategically.”

“Audiences for services may be changing in divergent ways. Part of the challenge is managing the mix of services to meet different expectations of different audiences.”

“Will users begin to carry around their own libraries? It will be portable, maybe implanted.”

“What will our users need/expect from research libraries – goes back to issues of relevance.”

“What information problems will our stakeholders still have? (Libraries only matter to the degree that they solve information problems for their patrons. And not just any problems –they need to be problems that the patrons KNOW they have and that matter to them.”

“Out-of-the-box thinking not prized by our profession because we’re a service industry, and the customer doesn’t get it if it’s too far out in front of them.”

Digitization of Content

For some the digitization of content is a predetermined. Some noted that in a decade all content should be digital. The only thing sure to remain physical are artifacts and rare documents and books. However, others see that what becomes digitized and more importantly how it is digitized is a significant uncertainty that directly impacts viable models for research and scholarly work. What will be the form of digitized content? How will users interface with it? Manipulate it?

Representative Quotes:

“One thing is for sure, we are moving from paper to digitization of content.”

“We are moving from complete print base to digital information base.”

“Physical will have value beyond information. It will be about artifacts and preservation.”

“Research libraries will continue to manage a large legacy of print materials.”

“The question will be how to reduce overhead – do we all need a copy? Versus one-of-a-kind pieces that have high value to scholars and are research libraries’ claim to fame.”

“Is there any digital heritage or research artifacts in existence? Has anyone really figured out this preservation for future generations?”

Control of and Access to Information

Who will control information in the future and how open will access be to the public and the user community? Research libraries find themselves playing a growing role in the political debate on open and public access to content.

Representative Quotes:

“Content is out of our control. Who will own and control the content?”

“The Federal government until recently did not think the public need access to publically funded research. However now they are pushing for free public access.”

“How will we successfully develop shared access to all collections?”

“We have a political role, working to insure that governments and businesses do not shutdown access to information.”

“What are the most powerful incentives for authors and their associations to tip the system to open sharing and use of research, while still preserving the values of critical review and validation?”

“Some day there could be a federal law to make all scholarly work funded by public dollars publically available.”

Future of Intellectual Property

Connected to digitization of content and control and access to information is the critical uncertainty surrounding the future of intellectual property. What new competitors and substitutes will be emerging for the services currently offered by research libraries? In particular, what will be the impact of the growing number of commercial vendors for content and services? How will changes in intellectual property regulation and management change teaching and research?

Representative Quotes: *New Competition and Substitutes*

“Will a substitute arise that can offer many current library services, and what would that look like?”

“The most strategic challenge will be justifying the costs of an academic library to our institutions when content providers are pushing their content directly to our users more efficiently and perhaps in a more cost effective way.”

“What will the outcome of the Google Book Settlement be? I ask because it poses lots of uncertainty about how we will be impacted (our service, role, budgets).”

“What will happen with the Google Book Settlement? I would like to know the international, global way these things play out. Will other countries be unlocking or locking things up?”

“Competition with IT departments”

Representative Quotes: *Impact on Teaching and Research*

“Will intellectual property regimes potentially destroy research and teaching?”

“Is there any chance the US copyright regime will change?”

“To counter information and data being locked up, there is a magic bullet – young people grow up and discover they can’t have access and there will be a revolution. Library and university are cautious about obeying law, but not students.”

“Involving libraries in teaching process to provide materials, digital rights management, and clearance of materials.”

Technology

Technology is considered the driver of much of the transformative change impacting research libraries. Whereas in many cases technology seems to devalue the human in the research process, the role of librarian could play a growing role in helping users navigate and understand the exponentially growing universe of information.

Representative Quotes:

“Technology is a critical driver impacting how academics communicate, do research, collaborate, and how libraries create access, archives, and living content.”

“A critical uncertainty for us to consider is advances in technology and impact [of those advances] on research methodologies.”

“What changes in technology can we anticipate that will have an impact on research and teaching? The Oracle reminds me of The Matrix – The Red Pill or the Blue Pill. I ask this question because libraries are so technology dependent.”

“Roadmap to the unfolding of information technology that will largely shape the services of research libraries.”

Viability of Higher Education

Most member research libraries are associated with a higher educational institution. As such they are intimately connected to the success and future viability of the higher education institution. At this time of transformative technology and new learning disciplines, the conventional educational institution is in danger of becoming obsolete. The research library could play a role in demonstrating the value of universities as they transform themselves to insure they remain a valued and vital contributor to the research and education process. Within this topic, several individuals noted how the criticality and value associated with the humanities disciplines continues to drop off dramatically while the criticality and value of the sciences is on the rise within universities.

Representative Quotes:

“The most important thing libraries can do is demonstrate the value of universities to the world vs. demonstrate the value of libraries to universities.”

“Biggest strategic challenge will be the financial health of institutions there in. My focus being public universities.”

“This is a story of the evolution of value. How higher education institutions will be valued and funded in the future is a big question. After World War II, the higher education institution was a social good. It is now seen as an individual good, hence public funding is slipping.”

“What will higher education look like? Can only plan for future of academic libraries in the context of higher education.”

“Will our parent institutions fund the vision to re-envision themselves before being made irrelevant by some unseen structure?”

“If we accept that our future is wrapped up in the future of higher education, what do the universities that we serve 25 years from now look like? What are their strengths and weaknesses? And, what types of research are being produced?”

“What is the fate of university museums and publicly funded cultural institutions?”

Representative Quotes: *Disinvestment in the Humanities*

“Disinvestment in the humanities. Research libraries strongest alliance.”

“Research libraries strongest alliances are with the humanities. Currently there is a powerful disinvestment in humanities.”

“Will there be a resurgence over the next 15 years in public respect for the humanities?”

“Higher education is moving toward vocational education. Degrees that don’t qualify you to do something get crushed.”

Funding and Budget Challenges

A significant uncertainty facing many research libraries and their institutions is funding. This holds true for both public and private institutions as both public funding and other funding sources have been severely challenged and reduced over the last few years. Many voiced a sense of certainty that the new environment of reduced funding would continue and needed to be factored into the research library’s future planning. The uncertainty is not as to whether funding will stay reduced or increase; but rather, what organizations will do in response to funding cuts and what new forms of funding will be developed. For many members this challenge is directly connected to the financial pressure experienced by their parent higher education institutions.

Representative Quotes:

“Our state contributions have been cut by 33% over the last three years. What will the future hold and how will that affect the institution and the library?”

“The commitment of society and political forces to supporting research institutions.”

“We are operating in a constrained funding environment. How do we operate with a shrinking share of the university budget?”

“Monetary and political support by external funders for library as a primary driver of academic excellence and achievement.”

“Will the federal government take a serious national level interest in research institutions, their research, including their research libraries?”

“Accountability movement in congress and the public.”

Critical Strategic Challenges

Transforming research libraries is a challenging process. It requires libraries to understand what will make them differential and valued in the future, how they can change and adapt to maintain relevancy in a content space that is continuously changing? The following is a sampling of some of the significant areas of strategic challenge that were identified by ARL members.

Achieving and Growing Relevancy in the Future

Relevancy of an organization is based on understanding customer needs and making an organization's offering relevant and indispensable to the customer. Successful research libraries will strategically position themselves to uniquely meet the needs of their users in such a way to leverage their distinctive capabilities. The majority of members who responded mentioned the criticality of understanding how research libraries achieve and grow relevancy in the future. Some of the representative quotes are general in form and content. Others focus on potential products and services to achieve and/or grow relevancy.

Representative Quotes:

“What is the role of the library and librarians in the research institution of the future? Why ask this? Back to the relevancy issue. Digital collections, new pedagogical specialists that teach academic skills, researchers and IT data and information repositories.”

“Can the library demonstrate to institutions and to scholars and learners that it brings value to their work? Will research libraries be indispensable in the future?”

“Remaining relevant, providing a strong value add in the research, teaching and learning environment of the University.”

“Ensuring we (research libraries) remain relevant within our institutions.”

“Remaining a viable part of the academic community”

“Retooling space and services to provide more relevant support to our institutions.”

“Adapting information provision service to the conflicting and changing styles and needs, expectations of students and faculty.”

“Transformation of services provided to faculty and students, i.e. breadth of collection; digital scholarship; virtual and physical place; and role of librarians.”

“What is the way we can have the most impact in helping our clientele?”

Representative Quotes: *New Products and Services to Meet Future Needs of Users*

>*Providing Value to the Non-academic Users*

“Translating the academic research for the nonacademic user.”

>*Focusing on Corporate/Private Sector*

“Library as enterprise, new business development for the academy.”

“How research is translated past the university/research enterprise may be a growing model.”

>*Promoting Public Interest and Advocacy for Open Access*

“Library as public interest/advocacy for supportive internal policies.”

“There are complex information policy issues. We will be playing an expanding role, focusing on not enabling governments and businesses to shut down access to information.”

>*Creating Scholarly Communication Future Value*

“Being an integral part of the creation of knowledge and open systems of scholarly communication that facilitates sharing, data mining, etc. “

“Maintaining a closer relationship with authors, editors, and publishers.”

“Will the new business models of publishing (likely self-publishing) enable consistent preservation and access functions?”

“How do we reclaim scholarly publishing from the commercial actors and library as a piece of that?”

>*Redefining the Library as a Physical Space*

“Will the library have a physical presence 15 years from now?”

“What will be the role of the physical space of the research library within its institution? We are the living rooms of the university. We need to re-conceptualize that space. It will still be the center of the university.”

“How do we transition to places where people come to work versus interact with collections?”

“We provide space for thinking and reflection...our students emphatically state that they expect to come to the library for research and study. Library as place is valued.”

>Creating value from Digital and Beyond-Digital

“Power of network to deliver information will grow exponentially in the future.”

“What is beyond digital? Digital is a step in a stage not a destination. What’s next?”

>Offering Personalized and Customized Information Experience “Just-In-Time”

“How do we create a more personalized and customized experience?”

“Customized research environment matched to users...& research projects.”

“...much more artificial intelligence, customization and responsiveness to user need.”

“How can we support self-service? Learning as ‘just-in-time’?”

Ability to change and adapt- How do we transform ourselves?

As mature organizations, research libraries recognize the challenge associated with truly transforming their processes and services. Existing workforce may or may not have the skills required in the future. An interesting perspective suggested is to remove all impediments and imagine what a research library would do if it was starting from scratch.

Representative Quotes:

“How would we do things from scratch if we started over now?”

“Is university infrastructure up to a big wave of change – is it capable to keep up with the fate of what is happening? I feel many are leap-frogging us in North America.”

“Transformation is not new. It has been going on for a long time.”

“The courage to change. We are not now what we need to be. We need to risk many things to maintain our relevancy.”

“Managing and responding to and hopefully influencing the change in scholarly communication system.”

“How can I (research libraries) start over with embedded practices, attitudes, behaviors? Are we talking evolution or revolution?”

“To transform the role of research libraries and librarians, librarians have to be willing to give things up. Books, local control of all their stuff; this is a big deal. Librarians love to collect.”

“How do our conceptual and organizational concepts and structures impede strategic advancement? I challenge the question (oracle question). It presumes the stability of the concept of a research library, rather it would be better to understand what organization and conceptual structures impede.”

“Ability to adopt and adapt technology to the changing needs of users.”

Rethinking Individual versus Collaborative Identity

Two views exist on why it is important to develop a collaborative identity and means of providing products and services to users. Some believe that the new highly connected users require more global and unbounded access to resources and content. Others see

that many current services, activities and assets in research libraries are not unique to the organization and are duplicated by many other research libraries. How do research libraries create a means to combine efforts on non-value add activities to gain the benefits of economies of scale? Both views require research libraries to rethink what it is that makes them distinctive and valued by users.

Representative Quotes:

“How do we move from establishing prestige from competition of collections to one by which we establish success through collaboration?”

“Envision collections as a single collection; not lending and not borrowing. We need to come to the table looking at the benefits of both sides.”

“Move from thinking of libraries as individual entities (individual collections and staff) to a more singular means in which collections of collections become a single distributed collection and staff become easily accessible to the whole.”

“When/will we have a collaborative collection development model that really works, that satisfies our most prevalent concerns? This affects service models, space/footprints questions, personnel development, funding models, strategic partnerships.”

“Large scale interdependencies, the ‘letting go’ of concept of individual, singular institutions, transforming into regional clusters entails new measurements and assessments.”

“Moving from single stand-alone entities towards a single one: with a ‘single collection’ and a ‘single set’ of common services- with singular thinking, planning, and action.”

“It is a challenge to move from an institutional base to a network level.”

“We need to move from competition into collaboration between libraries.”

“Interdependencies of libraries and libraries interdependencies with their institutions (balancing both is a challenge).”

“How do we abandon what we do commonly and build on what we do separately? Build a regional or national strategy to co-invest.”

“Linking with non-research libraries and developing a community collection can be very powerful.”

Leadership and Personnel of the Future

Leadership plays a critical role in developing and implementing a transformative plan for change within research libraries. Adapting and changing require strong and visionary leadership. Understanding what type of individuals and skills will be needed in the future research enterprise are critical to developing a strong and capable staff lead the transformation.

Representative Quotes:

“Adequate leadership capable of articulating a vision and executing the vision locally and in community.”

“Who will lead and staff research libraries in the future? Reason: without leadership and expertise, organizations – research libraries- cannot be successful. What types of individuals with what types of expertise best take us where we think the puck will be?”

“The professionalization of our field. In 25 years, what types of professionals will we need to hire in order to meet the needs of students, scholars, and faculty in the “new” libraries we are all serving?”

“How can we move towards the research library of the future and take our gradually decreasing complement of personnel with us?”

“How will we best be able to transform our library while using the workforce we currently have? Rationale: many staff were hired to do very different things than they currently do, or will be asked to do. Some will embrace the new opportunities, others have shown that they will/can not.”

Distinctiveness and Competitive Advantage

Distinctiveness is the key source of sustained competitive advantage. Competitive advantage is defined as being able to receive a higher rent (price) for the value you provide. Distinctiveness is doing something better than anyone else. Several areas of potential distinctiveness were mentioned in interviews.

Representative Quotes: *Archiving and Preservation*

“Equitable access, public good, trusted source of knowledge.”

“Access to the breadth of knowledge- that which has been gathered, preserved, and organized.”

“Collecting, preserving, making available rare/unique materials.”

“Archiving the institutional memory.”

“Long-term preservation of knowledge.”

“Deliver collaboratively the entire scholarly and research record.”

“Long-term archiving of scholarly and cultural record.”

Representative Quotes: *Navigation*

“In the wilderness of information, we have the compass. We have a better understanding of the entire landscape than any other entity.”

“Provision of authoritative, credible navigation/guidance through the overwhelming world of data/information.”

“One-on-one guidance through information mazes the user is unable to navigate alone.”

“Provision of context for widely diverse sources of information and helping the user navigate the validity or accuracy of that information.”

Representative Quotes: *Understand and Transform Information*

“Act as a translator between faculty who have a world view narrowly defined by their discipline and our students struggling to understand even the concept of a discipline.”

“Reciprocity of ideas”

“We understand information – its storage, organization, delivery & discovery.”

“Articulate the transformational implications for the organization of knowledge.”

“Depth and sophistication in subject knowledge, language, and expertise.”

“Keeping track of current literature for students and faculty is not distinctive, but becomes distinctive when you embed the librarian into research groups for high-level projects.”

Visions and Strategies for the Future

Many individuals interviewed shared their visions and strategies for the future. There are clear themes that run through the quotes that follow as well as some unique strategies for the future.

Representative Quotes: *Visions*

“I like one of our humanists who wrote about the university library, ‘we are like the shaman or wise men who pass on stories.’ We need to pass on the multitude of forms for stories in the future. ‘If this is your land, where are your stories?’”

“In the future, more learning and scholarly process becomes visualization and simulation games and so becomes more meaningful for education and research.”

“There will be open access and the scholarly environment will have open educational and scholarly materials. The material will be evidence based, high quality, with high research integrity and so will be far more intelligent than today. All objects will have intelligence and there will be much more artificial intelligence, customization, and responsiveness to user needs.”

“Learning and scholarly research will become more participative, interactive, and more intuitive of an experience for users.”

“Research library will have continuing responsibility for information, including selection, acquisition, synthesis, navigation, dissemination, interpretation, understanding, use, application, archiving and new and expanded roles in aggregation, publishing activities, education policy, and R&D and entrepreneurial advocacy.”

“There are a number of competing and or complementary visions for academic research libraries:

- Library as legacy responsible for centuries of scholarly work
- Library as infrastructure, space with technology expertise
- Library as repository for long-term archive
- Library as portal, guide to information of relevance and quality
- Library as enterprise doing new business development for the academy
- Library as public interest, providing advocacy for supportive information policies.”

“Lack of respect currently in sciences for the research library will change as the library becomes an integral team member in scholarly work.”

Representative Quotes: *Strategies*

“What features of the future library will set up apart from other entities on campus? If we are not a big box of books and journals, what distinguishes us from the computer center, the student center, etc.?”

“What will our primary mission be? If we know where we should be headed, we might be able to come up with strategies to get there; right now I’m not sure we know where to go.”

“Make information ubiquitous so there is no apparent price barriers between user and the needed information.”

“There needs to be the formation of consortia to handle work to leverage economies and scale.”

“Increase open access at lower cost.”

“We need to move from competition to collaboration between libraries.”

“Power of the network to deliver information will grow exponentially in the future. We need to create a networked delivery pipeline.”

“Convenience trumps quality any day, we need to make quality information convenient, such that it is easy to access and manipulate.”