

University of Arizona confirmed presentations to be presented:

[Our Spin on Hoshin: How We Survived the Strategic Long Range Planning Process From Paper, to Panic, to Peace!](#)

[If You Build It, They Will Come: The University of Arizona Library's Information Commons Two Years Later](#)

[Establishing Processes That Support the Exploration and Development of Grants and Revenue Activities](#)

[Strategically Thinking about Journal Collections](#)

[Inevitable Surprises: Planning for the Future](#)

[Revolutionizing Electronic Document Delivery: Transforming and Integrating Electronic Reserves, Interlibrary Loan, and Document Delivery](#)

[Informed Importance: Customers Tell Us What Is Important in Reference](#)

[Transforming Higher Education: New Roles for Libraries](#)

[Information Access Budget Allocation Modeling](#)

[Collaborative Efforts in Building Scholars Portal: Roller Coaster, not Rocket Launch](#)

[How SPRAT Sprouted: Using Decision-Making Tools to Create Resource Profiles in Scholar's Portal](#)

[Space Planning in Times of Budget Crises-Combine, Compact, and Get Creative](#)

[The Arizona Electronic Atlas: from Planning to Reality](#)

[Tough Times, Tough Decisions: Streamlining, Studying, and Experimenting to Save \\$ and Better Serve Customers](#)

[Becoming a Virtual Federal Depository Library](#)

[GROW: A National Civil Engineering Education Resource Library Meeting the Needs of a Diverse Audience of Users](#)

[Information Literacy: Scaling up for Student Achievement and Creating a Plan for Success](#)

Abstracts

Title: **Our Spin on Hoshin: How We Survived the Strategic Planning Process**

Presenters: Liz Bezanson, Joe Brewer, Carrie Fang, Sharon Knowlton, Steve Llewellyn, Jeanne Pfander .

Ten years ago, the University of Arizona Library adopted Hoshin Planning as our strategic planning method of choice. We will show how the Year 10 version of our strategic plan illustrates alignment with organizational needs. This presentation will focus on highlights of the current plan, including a new (very short) mission statement, expanded goals, and our approach to get from here to there "painlessly". We will talk about analyzing huge amounts of data and then communicating with all library staff members to explain our ideas, get their input, and refine the plan based on feedback from dialogues. Other UofA presentations will describe current efforts that are future focused to best serve customers; this presentation will give you an overview that brings it all together.

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Title: **From Paper, to Panic, to Peace!**

Presenters: Bobbie Atchison and Marda Johnson

Efficient and effective customer access to a library's electronic resources is critical for seeking information in today's academic setting. In order to prepare the local ILS system for aggregated searching using the ARL Scholar's Portal (identified as a very high priority by our customers), Technical Services and Archival Processing (TSAP) Team undertook several projects. Among these tasks was to standardize the holdings information within the shared systems and find or develop a license management system. TSAP is well along with both of these projects incorporating Serials Solutions and Innovative Interfaces Electronic Resource Management subsystem. How did these systems come together to provide access to information for external customers and consolidate licensing data for more efficient access by authorized staff? What are the issues and solutions that this institution encountered? The answer to these questions and more will be investigated during this session.

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Title: **If You Build It, They Will Come: The University of Arizona Library's Information Commons Two Years Later**

Presenters: Robert Mitchell, Rebecca Swift, Leslie Sult

Abstract: In January, 2002, the University of Arizona Library opened its Information Commons. It was the culmination of years of planning, not only for the basic infrastructure but also for staffing and staff training. As of Spring, 2004, we find that some of our expectations were confirmed, and others were not. This presentation will be based on data from customer surveys as well as more subjective impressions of the current situation and future needs; and it will cover the lessons we've learned in the two years that the Information Commons has been delighting and frustrating our customers.

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Title: **Establishing Processes That Support the Exploration and Development of Grants and Revenue Activities**

Presenters: Sheril Hook, Maliaca Oxnam, Karen Holloway

Abstract: The project team will describe why this team was formed and what processes they have developed. An important part of these processes is how decisions are made as to whether a revenue project should proceed or a grant opportunity pursued. The project team has completed the revenue process which is being tested by another team in the library (Revenue Exploration Project Team). The grants process is under development; however, progress to date will be shared with conference attendees.

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Title: **Strategically Thinking about Journal Collections:**

Presenters: Marianne Stowell Bracke and Jim Martin

As we move into the 21st Century, the definition of a journal collection is shifting to accommodate struggles with space issues and static budgets as well as advances in electronic access. The Science-Engineering Team is developing strategies to re-think how journals are collected, selected, accessed, and stored to better suit the needs of the modern library and its users.

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Title: **Inevitable Surprises: Planning for the Future**

Presenters: Verónica Reyes

In a time of fast-paced, uncertain and transformational change, libraries need to prepare themselves and begin planning for the roles they will play in a not so distant future. The Access & Delivery team was formed and charged to recommend to the library, "the principles, strategies and priorities that will guide us to effectively provide access to and deliver information and realize our vision for the library in 2013 (and beyond)". The team developed environmental scans in the areas of higher education, scholarly communication, preservation, technology, demographic and economic trends which helped us pinpoint areas of paradigm shifts and areas which needed special attention if we are to be key players in education and the dissemination of information in the future. We will also discuss barriers which we encountered in our process.

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Title: **Revolutionizing Electronic Document Delivery: Transforming and Integrating Electronic Reserves, Interlibrary Loan, and Document Delivery**

Presenters: Ruth Dickstein, Cheryl Neal, Lee Hemphill, Marianne Stowell Bracke, and Gabe Vincent

By using a system's analysis approach, a team of six developed and implemented a plan that merged the work activities of three distinct units, Interlibrary Loan, Electronic Reserves, and Document Delivery. This team, EDAT (Electronic Delivery Analysis Team), was charged with three tasks:

- Increase efficiency
- Eliminate duplication of efforts and process
- Offer new reserve services

The result of EDAT's efforts are exemplified by the successful implementation of audio reserves, electronic color and graphic reserves, full implementation of ILLiad, and merged scanning and paging processes. EDAT members will discuss the process and challenges it faced during the system's analysis and implementation phases.

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Title: Informed Importance: Customers Tell Us What Is Important in Reference

Presenters: Marianne Stowell Bracke, Michael Brewer, Robyn Huff-Eibl, Dan Lee , Robert Mitchell and Michael Ray

The Library recognized that the culture and context of reference was changing for a variety of reasons. For example, the Library has been striving towards an atmosphere of self-sufficient users, a desire expressed by users in past customer surveys. At the same time, users may still struggle with issues of access during the growing pains of increasing electronic resources and require some form of assistance. The Finding Information in a New Landscape (FINL) Team began in Fall 2003 to investigate the effectiveness and cost-efficiency of all Information and Referral processes wherever they took place in the Library. This included a customer survey to measure action rather than satisfaction and to discover what is most important to users in the reference process.

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Title: Transforming Higher Education: New Roles for Libraries

Presenters: Joe Brewer and Sheril Hook

This interactive discussion focuses on library strategies for supporting institutional transformation. Attendees will explore ways that library expertise--particularly in integrating informational technology and information literacy into the curriculum--can contribute to improved student outcomes and faculty/staff satisfaction, while controlling the costs of higher education.

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Title: Information Access Budget Allocation Modeling

Presenters: Hitoshi Kamada and Karen Tallman

Abstract: "The Information Access Budget Allocation Project Team reviews the Team's development of a new information resource budget allocation model that 1) is more responsive to current and future research and educational directions of the University, 2) better reflect the current information access environment, and 3) enables the Library to manage funds more effectively."

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Title: Collaborative Efforts in Building Scholars Portal: Roller Coaster, not Rocket Launch

Presenter: Michele Saunders

Abstract: The benefits and challenges of interlibrary and intra-library collaboration experienced by the University of Arizona Scholars Portal Implementation Network (SPIN) in building Scholars Portal.

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Title: **How SPRAT Sprouted: Using Decision-Making Tools to Create Resource Profiles in Scholar's Portal**

Presenters: Mary Feeney & Jill Newby

Abstract: The Scholar's Portal Resource Access Team's (SPRAT) approach and decision-making tools used to develop groupings of resources for the initial launch of Scholar's Portal at the University of Arizona Library.

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Title: **Space Planning in Times of Budget Crises-Combine, Compact, and Get Creative**

Presenters; Jim Fromm, Jim Martin, Nora Simmons, and Mina Parish

Abstract: The cross-functional Space Planning Team reviews actions and plans developed to deal with space shortages and changing Library requirements. In face of a severe campus Library space shortage, aging facilities, tight budgets, and changing University directions, the team in coordination with other Library teams is developing and implementing creative solutions to deal with collections density problems, and changes in customer needs.

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Title: **The Arizona Electronic Atlas: from Planning to Reality**

Presenters: Atifa Rawan, Louise Greenfield, and Jeanne Pfander

The UA Library has created a dynamic web-based interactive state atlas that allows users to create, manipulate and download accurate and current maps and data through an easy-to-use interface. This project is an example of the library's ability to translate vision into reality.

The University of Arizona Library has been the driving force behind the creation of this resource, with the collaboration of the Arizona Department of Library, Archives, and Public Records, the Arizona State Cartographer's Office, Arizona Geographic Information Council, and Arizona State University. In this presentation, we will discuss our project plan, initial grant awarded, data conversion, site creation and usability test., plans for use in the classroom and the larger state community.

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Tough Times, Tough Decisions: Streamlining, Studying, and Experimenting to Save \$ and Better Serve Customers

Presenters: Patricia Ballesteros, Travis Teetor, Becky Gonzalez, Mina Parish, Robyn Huff-Eibl , and Norma Perez

- Creating a new staffing model and building leadership within the team - reducing circulation staff by moving to Express Check out (moving from providing mediated to unmediated service for basic circulation transactions allowing staff to focus their time on providing Information and Referral) and reallocating student wages to .5 positions.
- Transitioning to Information & Referral Services at the Circulation Desk-building competencies.
- Cost analysis of hiring and training shelvers.
- "Where's the book?" - addressing the customer's "biggest" problem
- Managing customer expectations and streamlining processes, developing new circulation and reserve policies and developing innovative service delivery (placing materials such as holds, CDs, reserve materials, videos and audio tapes either out in the general stacks or online so that we do not have to check them out at a desk)

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Title: Becoming a Virtual Federal Depository Library

Presenters: Cheryl Malone and Atifa Rawan

Abstract: The UA Library has made a strategic decision to become the first virtual federal depository library and to explore this new model. The decision fits the UA Library's general policy of preferring electronic over tangible formats, but the continuing availability of the information resources remains an issue. Consequently, the transition to virtual depository status requires continued monitoring, staff commitment, and ongoing assessment to ensure that the library's staff and customers are benefited rather than disserved by the decision. Equally clear, in the case of the UA Library, is the feasibility of moving forward with the transition. In this presentation, we will discuss our project and how we are surviving the virtual depository environment.

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Title: Information Literacy: Scaling up for Student Achievement and Creating a Plan for Success

Presenters: Rebecca Swift and Leslie Sult

Abstract: The University of Arizona Information Literacy team will present an overview of current strategic directions, including efforts to develop models of scalable instruction as well as an Information Literacy program plan.

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Title: **GROW: A National Civil Engineering Education Resource Library Meeting the Needs of a Diverse Audience of Users**

Presenters: Muniram Budhu, Maliaca Oxnam and Yan Han

Abstract: The Geotechnical, Rock and Water Resources Library (GROW) (<http://www.grow.arizona.edu>), Funded by the National Science Foundation (NSF), is the first phase of the National Civil Engineering Education Resource Library and a part of the National Sciences Digital Library (NSDL) (<http://nsdl.org>). The GROW collection contains peer-reviewed resources from the web and resources created internally which are interactive multimedia learning objects. Winners of the 2003 Macromedia MAX award, the GROW team is expanding on its collection by collaborating with K-12 students and teachers throughout the U.S. and finalizing Flash learning object templates that integrate with XML and are SCORM compliant.

Non U of A Confirmed Presentations :

Loyola

Theme: Strategic Reallocation for the 21st Century Library

Title: **The Technology Cycle: A Team Approach to Technology Decisions and Budgeting**

Presenters: Laurie Gibson, Technical Services Coordinator and Susan Brower, Media Services Coordinator

San Jose

Theme: **Strategic Partnering** (merged public and state university library; reference service for different constituencies)

Presenters: Sandra Belanger and Lisa Rosenblum

Stanford

Theme: Supporting Staff through Transformational Change (recent brain research on how anxiety affects thinking; natural systems theory and human interaction in the workplace)

Title: **To be announced**

Presenter: Katherine Kott, Head of Cataloging and Metadata Services

U. Kansas

Theme: Strategic Partnering

Title: **High Velocity Change through High Volume Collaboration: A Unique Approach to Transformation**

Presenters: Stella Bentley, Dean of Libraries; Donna Liss, Associate Vice Provost, Information Services; Jenny Mehmedovic, Assistant to the Vice Provost for Information Services

U. Maryland

Theme: Supporting Staff through Transformational Change

Title: **Summer Camp Revisited: UM Libraries Summer for Supervisors**

Presenters: Sue Baughman, Lori Goetsch, Johnnie Love, and Maggie Saponaro

U. of Southern California

Theme: Strategic Partnering

Title: **Strategic Planning for the 21st Century Library: Mission-Driven Strategies for Library and Information Services**

Presenters: Karen Howell, CIS Committee Vice-Chair for Strategic Planning and Director, Center for Scholarly Technology

University of Maryland Libraries

Summer Camp Revisited: UM Libraries Summer for Supervisors

The UM Libraries, as a team-based learning organization, must address the ongoing challenge of defining, understanding, and practicing shared leadership. As an organization, we pursue service excellence at all levels and strive to nurture both a shared vision and set of values among staff that define the way we work together. In addition, as we change as an organization, we must change as individuals to understand and fulfill our role within the Libraries and to sustain the organization's progress. One way the UM Libraries have attempted to do this is through a leadership development plan as presented in Working Paper # 7, <http://www.lib.umd.edu/groups/learning/WP7.html>. This session will address one component of the plan, the Summer for Supervisors series, which provides a framework supporting and nurturing leadership skills. Come sit around the campfire to learn about this program and share your stories about creating a new image for supervisors.

Sue Baughman, Lori Goetsch, Johnnie Love and Maggie Saponaro

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