

## VALID Project Principles

The purpose of VALID is to allow all New Jersey academic libraries to have the opportunity to benefit equally from their membership in the consortium. Where possible, VALID is working to unify policies, improve and foster collaboration and create a sum greater than their parts. A key factor in this is the adoption of a shared, community-source, library service platform that will allow us to share the same library system, thereby reducing redundancy, reduce our reliance on commercial system vendors, and enjoy the advantages of completely new system architecture based on the evolving formats and practices in our profession.

**VALID is committed to the following objectives:**

- A cost-effective, shared library service platform;
- Resource discovery , borrowing and delivery between participating institutions;
- Standardized polices of acquisition, description and delivery;
- Shared development of enhancements that benefit all participating institutions;

## Sharing the Common; Enabling the Unique

VALID has at its core a commitment to shared governance whereby all participants are involved in decision-making. All VALE institutions will have the opportunity to explore what VALID implements and decide whether it is a good fit for them. There is no obligation to participate. VALID believes that abundant and effective communication, ensuring transparency and accountability is vital. VALID intends for the products of its work to make good business sense and be supportable and affordable for all who participate.

From its inception, the VALID project seeks to make the resources of its members available to all its participants, foster a rich and dynamic academic and research environment in New Jersey that reduces redundant efforts, yet highlights and respects the uniqueness and diversity brought together by our individual institutions. We all benefit from both our collaboration and our individuality.

Learn more about the VALID project at [www.valeni.org/valid](http://www.valeni.org/valid).

## Operationalizing VALID

How can all of this be made to happen? What must occur for this vision to become a reality? These (and other) questions have been asked and many of you have been involved in conversations at the VALE Executive Committee, VALID OLS Steering Committee (VOSC) and VALID OLS Implementation Taskforce (VOIT) meetings.

Working within the bounds of its new strategic partnership with NJEdge.Net, VALE issued an RFP for the organization and operation of VALE's shared integrated library system.

Perhaps this was a task that no one outside of our own membership felt able to take on. With only one response to the RFP it was withdrawn. Alternatively, VOSC invited two consultants: Carl Grant and Liz Bishoff, to work with the steering and implementation committees on establishing a clear vision for the project and laying out the organizational and administrative structure. Summaries of these workshops can be found on the following pages.



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### Special points of interest

- VALID seeks to eliminate organizational silos, reduce redundancy and promote efficient operations
- VALID propositions aim to transform libraries and preserve their relevance
- VALID is intended from the start to fit your libraries needs and culture.



## Carl Grant on Library Transformation

To help VALID better plan and organize its work, VOSC (encouraged by the VALE Executive Committee) engaged the services of Carl Grant as a one-day consultant. Carl is Associate Dean for Knowledge Services and Chief Technology Officer at the University of Oklahoma Libraries. He brings comprehensive experience in library technologies as an innovator of systems, an executive on the corporate side, and a respected consultant to libraries worldwide.

Grant presented a sobering reality check for libraries. In the face of a rapidly evolving information environment, traditional resources are replaced by digital ones and the value of libraries themselves are being questioned. Perhaps his most direct message to us

involves the myopia in which we place too much importance on formats, books in some cases, and not enough on how we should be promoting the use of the information they contain. He used the example of Kodak, thinking they were in the film/camera business rather than in the photography business. Grant warned us against being identified too closely with formats, practices, and brands already becoming obsolete.

Led by Grant, a group composed of VALID Steering & Implementation Committees, library administrators, and member institution CIOs explored roles for the library outside of traditional ones, engaging our constituencies, seeking to produce new knowledge and make it widely available.

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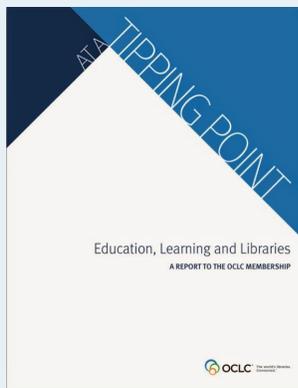
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### At a Tipping Point:

#### Education, Learning and Libraries.

Grant referred several times to an OCLC report on the transformation of how we consume and evaluate information.

<http://bit.ly/1oYIKZ8>



## Carl Grant's Questions to Us

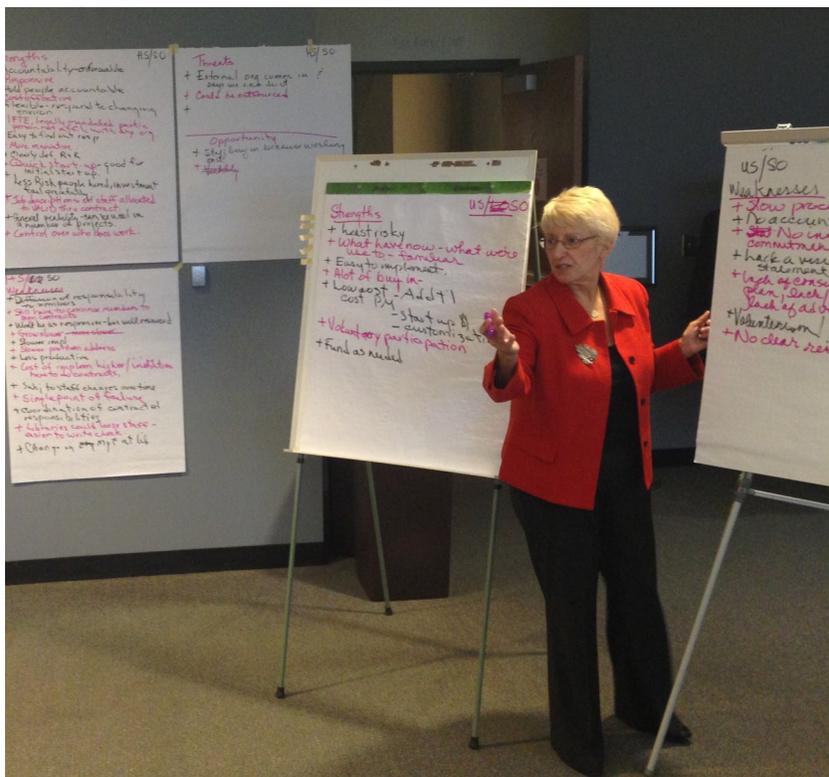
Carl Grant encouraged us by showing that libraries have the power to transform themselves and their institutions, moving from being information warehouses to knowledge factories. He provided a set of questions we should ask ourselves and whose answers help lay out an evolutionary path.

1. What programs do you think you could launch on your campus that underscore the library as an intellectual commons area?
2. What collaborative ideas do you want to explore that involves other libraries?
3. Draft a change management plan for moving your library to a new system. What steps would you undertake?
4. Develop a list of barriers in your libraries that users face. What can you do to remove them?
5. Suggest ways to get your library teams more engaged with the communities they serve. What new technologies would be needed?
6. What are your plans for extending the value of librarianship in the future?
7. Describe how you market your library services. How do you make people aware of your services?
8. How do we turn our library organizations inside out, so as to seamlessly embed ourselves in our users work and lives, to the benefit of all?
9. How can libraries work together to better support innovation and entrepreneurship?

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See full summaries of both Grant and Bishoff workshops at [www.valenj.org/valid](http://www.valenj.org/valid)

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## Liz Bishoff on VALID Project Organization

Liz Bishoff provides management consulting services to libraries, museums and other cultural heritage organizations. An authority on library management, Bishoff has held positions at university libraries and OCLC and consulted widely in the field of digital initiatives. She is a member of ALA Council and Board. Bishoff was engaged by VALID to work with us on organizational structure.

Bishoff said that the library service platform (LSP) must have a sound structural foundation, but that, using the analogy of selling a house, this foundation is both not easily visible nor the part of the house used to sell it to a buyer. She said that finding a compelling message of value for both the internal library staff and the external group of college and university administrators are important initial steps to change.

Related to this is the relationship of the VALID project with VALE as a whole. VALID has the potential to serve as the consortium's R&D arm, with the work on OLE being a prototype. We must always be aware that VALE is composed of a range of institutions with a range of needs and abilities. One way of looking at the work of VALID is that it is focused on the 20% of our work that is considered "emerging" and how, as a consortium, we can transform ourselves.

For the active, participatory phase of the workshop, the attendees broke into four sections, each representing a hypothetical VALID organizational structure:

Highly structured— Small organization	Highly structured— Large organization
Unstructured— Small organization	Unstructured— Large organization

The group concluded that "Highly structured – Small organization" fit VALID the best, but was only a recommendation. Such

a small, yet highly structured organization was deemed best able to innovate and nimbly respond to the current volatile educational and IT environments. This model was felt to be cost effective, less risky, and able to pursue a variety of innovative projects.

## About SWOT Analysis

A **SWOT analysis** is a structured **planning** method used to evaluate the **strengths, weaknesses, opportunities and threats** involved in a **project** or in a **business** venture. A SWOT analysis can be carried out for a product, place, industry or person. It involves specifying the objective of the business venture or project and identifying the internal and external factors that are favorable and unfavorable to achieve that objective. - Wikipedia

## Implementation Milestones

### COMPOSITE CATALOG

As first demonstrated at the 2014 VALE Conference, the VALID OLE Implementation Taskforce, VOIT, has successfully created a composite record architecture for a consortial catalog. For this year's conference the Reference Services Committee will present their work on optimizing the user interface for the most effective display of search results.

<http://Validnj.org/vufind>

### CONSORTIAL BORROWING

The VALE OLS Implementation Taskforce (VOIT) and Resource Sharing Committee team have produced a working prototype of the Quali OLE Delivery Module—consortial borrowing. At their VALE Conference session (B02) they will demonstrate basic circulation, borrowing privileges, loan periods, renewals, holds/requests and recalls.

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## Lehigh Visit Summary

Along with the Implementation team (Ann Hoang, Chris Sterback, Yongming Wang, Gracemary Smulewitz, Guy Dobson & Mark Sandford), Dave Hoover and I visited Lehigh University in Bethlehem, PA where the Kuali OLE library system was installed over the summer.



Their implementation team had just presented on their experience at the Kuali Days conference, and they shared their presentation slides with us, reviewed the system and answered our questions. They are happy with OLE. It does what they need it to do.

They have made some changes to their workflows to accommodate OLE's functionality, but these have not been major.

