IMPLEMENTING ARL’S STRATEGIC PLAN:
A MEMBER REPRESENTATIVE DISCUSSION

Agendas, Preliminary Scope Statements, & Discussion Documents

146th ARL Membership Meeting
May 25–26, 2005
Philadelphia, Pennsylvania
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Implementing ARL’s Strategic Plan:
A Member Representative Discussion

Agenda, May 25–26, 2005

Wednesday, May 25, 2005

9:00 a.m.–12:00 noon  Implementing ARL’s Strategic Plan

   Grand Ballroom

   Ann Wolpert, Massachusetts Institute of Technology, ARL President

   The following reports will be interspersed with opportunities for questions and discussion; a 15-minute break will be called at approximately 10:00 a.m.

Strategic Plan & Implementation Team Reports

   • Brian E. C. Schottlaender, University of California, San Diego, Chair, Strategic Planning Task Force
   • Shirley Baker, Washington University, St Louis, Chair, Implementation Team

Preliminary Scope Statements

   • Carol Mandel, New York University, Chair, Scholarly Communication Steering Committee
   • Winston Tabb, Johns Hopkins University, Chair, Information & Other Public Policies Steering Committee
   • Betsy Wilson, University of Washington, Chair, Teaching, Learning, & Research Steering Committee

12:00 noon–1:00 p.m.  Lunch break

Two options are available:

   Over lunch in the Petite Ballroom, Jerry Campbell, University of Southern California, will brief the membership on the InCommon federation.

   Lunch without a speaker will be available in the Pantheon Room.
1:00 p.m.–3:00 p.m. Standing Program Committees Meet Simultaneously

Member representatives not currently serving on one of these committees are encouraged to attend the committee of their choice.

- **Collections & Access, Plaza III (third floor)**
  Alice Prochaska, Yale University

- **Diversity, Arden (second floor)**
  Barbara Dewey, University of Tennessee

- **Information Policies, Plaza I (third floor)**
  Lance Query, Tulane University

- **Intellectual Property, Plaza II (third floor)**
  Winston Tabb, Johns Hopkins University

- **Leadership & Management, Mellon (second floor)**
  Camila Alire, University of New Mexico

- **Preservation, William Penn (fourth floor)**
  Tom Leonard, University of California, Berkeley

- **Scholarly Communication, Betsy Ross (fourth floor)**
  Carol Mandel, New York University

- **Statistics & Measurement, Constitution (fifth floor)**
  Brinley Franklin, University of Connecticut

3:00 p.m.–3:30 p.m. Break

3:30 p.m.–5:00 p.m. Standing Program Committee Reports & Open Discussion

Grand Ballroom

Thursday, May 26, 2005

8:30 a.m.–9:15 a.m. Implementing ARL’s Strategic Plan—continued

Summary of Previous Days Findings and Next Steps

Grand Ballroom

Ann Wolpert, Massachusetts Institute of Technology, ARL President

- Carol Mandel, New York University, Chair, Scholarly Communication Steering Committee
- Fred Heath, University of Texas at Austin, reporting on behalf of the Information & Other Public Policies Steering Committee
- Betsy Wilson, University of Washington, Chair, Teaching, Learning, & Research Steering Committee
ARL Steering Committees

Charge

1. Define the scope of the strategic direction being attentive that the Guiding Principles in the Strategic Plan are appropriately reflected in the scope.
2. Involve ARL members in discussions of strategic directions.
3. Review current program efforts to assess whether they are consonant with the strategic direction in the Strategic Plan.
4. Propose initiatives within the scope of the strategic direction.
5. Develop mechanisms to advance the strategic direction initiatives (e.g., task forces, subgroups).
6. Work with the ARL Executive Director to identify appropriate ARL staff liaison.
7. Provide annual updates to the Board on progress on initiatives that can serve as a key ingredient in the Board’s assessment of ARL’s success in implementing the plan.
8. Monitor the environment, look forward strategically, and advise on adjustments to the direction.

Rosters & Terms of Appointment

Scholarly Communication
Carol Mandel, (NYU) Chair, 3 years
Carol Diedrichs (Kentucky) 3 years
Mark Haslett (Waterloo) 2 years
Jeffrey Horrell (Dartmouth) 3 years
Jim Neal (Columbia) 2 years
Jerome Yavarkovsky (Boston College) 1 year
Initial Staff Liaisons: Karla Hahn, Jaia Barrett, Duane Webster

Information & Other Public Policies
Winston Tabb, (Hopkins) Chair 3 years
Deborah Carver (Oregon) 3 years
Fred Heath (Texas) 1 year
Charles Lowry (Maryland) 2 years
Dana Rooks (Houston) 3 years
Jack Siggins (George Washington) 1 year
Initial Staff Liaisons: Prue Adler, Jaia Barrett, Duane Webster

Teaching, Learning, & Research
Betsy Wilson, (Washington) Chair 3 year
Barbara Dewey (Tennessee) 3 years
Joan Gieseke (Nebraska) 2 years
Wendy Lougee (Minnesota) 1 year
Gary Strong (UCLA) 3 years
Jim Williams (Colorado) 1 year
Initial Staff Liaisons: Julia Blixrud, Mary Jackson, Jaia Barrett, Duane Webster

April 28, 2005
Scholarly Communication Steering Committee
Preliminary Scope Statement

Strategic Direction I:
Scholarly Communication

*ARL will be a leader in the development of effective, extensible, sustainable, and economically viable models of scholarly communication that provide barrier-free access to quality information in support of teaching, learning, research, and service to the community*

—ARL Strategic Plan

Introduction
The challenge before ARL is to promote simultaneously:

- improvements in features of the traditional systems and markets that can be reshaped and
- transformative strategies that advance barrier-free, effective, and sustainable new models of research and scholarly communication.

While there will be multiple ARL initiatives to advance this strategic direction, it is important that each does so with the shared vision of the long term outcome: effective, extensible, sustainable, and economically viable models of scholarly communication that provide barrier-free access to quality information in support of research, teaching, learning, and community service. To achieve this vision, reshaped or new models of scholarly communication need to be responsive to disciplinary norms so that they will be widely adopted and must have embedded within them principles of good access and preservation. Recognizing that the landscape of scholarly communication is global and multinational, ARL seeks to build on the best of traditional and new methods that can be successful in this landscape.

Preliminary Scope Statement
The scope of this strategic direction includes:

1. Identifying, encouraging, and assessing new or enhanced models of scholarly communication that promote wide availability and enduring access.
2. Encouraging and facilitating the application of technology to enhance scholarly communication within a framework reflecting the norms and communicative practices of the disciplines.
3. Assessing business practices and developing responses that influence marketplaces and enhance the system of scholarly communication.
4. Enhancing outreach efforts to inform the research and educational communities about scholarly communication trends, findings, opportunities, and their impact on research, teaching, and learning.
5. Building alliances and pursuing opportunities for collaboration to improve or transform scholarly communication.

6. Understanding and facilitating research, analysis, and advocacy on key scholarly communication issues.

7. Facilitating linked digital repositories to archive and manage scholarly output.

8. Encouraging author rights retention strategies that enhance the long-term effectiveness of scholarly communication.

9. Promoting and facilitating the development of library professionals who have the expertise and knowledge to contribute to enhanced and transformed systems of scholarly communication.

Intersections

As noted in the strategic plan, a complete system of scholarly communication embraces a full range of functions. These functions include authoring, informal peer communication, editorial review and validation, acquisition, and access strategies, location and delivery of information (for the individual and for teaching), and preservation and archiving. In addition, the functions need to be able to embrace a growing array of research and education resources stretching far beyond the published literature to include great varieties of text, datasets, preprints, images, media, software, simulations, and other special collections. As a consequence, ARL initiatives within the area of scholarly communication will intersect with the work of the other two ARL strategic directions -- Information Policies and Teaching, Learning and Research.

For example, the Steering Committee identified intersections of scopes with Information Policies (e.g., intellectual property practices in the disciplines, and the digital rights management systems that facilitate those practices) and with Teaching, Learning, and Research (e.g., Scholars Portal and federated searching as they influence facilitating linked digital repositories). The Steering Committee recommends active communication and integration of findings across task forces or other subgroups as well as complementary collaboration with SPARC.

The Steering Committee’s preliminary review suggests the following as examples of ARL activities that may be included, or be reshaped to include within this strategic direction:

- digital archiving/preservation of digital content;
- encouraging authors to retain their intellectual property rights; and
- development of resources and forums that prepare library professionals to contribute in the arenas.

Illustrations of New Task Forces or Subgroups

The Steering Committee concluded it was premature for it to suggest possible new task forces or subgroups to carry out this strategic direction until the full ARL membership has an opportunity to reflect and comment on the preliminary scope statement and the committee identifies its highest priority initiatives.
Information & Other Public Policies Steering Committee
Preliminary Scope Statement

Strategic Direction II:
Information & Other Public Policies

ARL will influence information and other public policies, both nationally and internationally, that govern the way information is managed and made available.

—ARL Strategic Plan

The scope of this strategic direction includes:

1. Actively influencing laws, policies, regulations and judicial decisions that are key to research libraries and their users, such as those governing the use of copyrighted materials, privacy, intellectual and academic freedom, access to government information, and the funding and infrastructure required to sustain the mission of academic and research libraries.

2. Providing leadership in the international library, research, information technology and educational communities with regard to policies and laws affecting research libraries and their users.

3. Working to reduce legal barriers to access and use of the research results from publicly funded research projects.

4. Increasing the understanding by administrative and academic leaders of the implications of public policy choices.

5. Undertaking and facilitating research, analysis and advocacy on key public policy issues; developing policy proposals (e.g., “white papers”) based on this work; and disseminating these policy proposals and the results of that research and analysis.

6. Building strategic alliances—e.g., AAU, Library Copyright Alliance, NASULGC, and HEITA (Higher Education Information Technology Alliance).

7. Supporting initiatives of other ARL steering committees when they require executive, legislative or judicial action.

The Steering Committee on Information & Other Public Policies anticipates that time-limited task forces and other ad hoc groups will address specific issues and legislative and judicial initiatives. For example, the Working Group on Digitizing Government Documents might continue, and we would likely create a working group on orphan works once the Copyright Office proposes changes to existing copyright law to address the orphan works problem.
Teaching, Learning, & Research Steering Committee
Preliminary Scope Statement

Strategic Direction III:
Teaching, Learning, & Research

ARL will promote and facilitate new and expanding roles for ARL libraries to engage in the transformations affecting research and undergraduate and graduate education.

—ARL Strategic Plan

The scope of this strategic direction includes:

1. Identifying, encouraging, and assessing new models of library engagement in teaching, learning, and research in a diverse environment.

   Examples from “old” committees:
   Special collections primary resources to transform undergraduate courses.
   Data curation and cyber infrastructure.
   Open access models. Learning outcomes.
   Intersection with Scholarly Communication and Statistics & Measurement committees.

2. Advancing the development of information infrastructure that supports teaching, learning, and research (e.g., tools, policies, and systems).

   Examples from “old” committees:
   Open Archives Initiative.
   Semantic web.
   NDIIPP.
   Cyberinfrastructure.
   Intersection with Information Policy Committee (e.g., privacy and managing intellectual property).

3. Promoting and facilitating the development of library professionals engaged in and leading partnerships that advance teaching, learning, and research.

   Examples from “old” committees:
   Reshaped Leadership and Career Development Program.
   Refocused work of the Research Library Leadership Committee.

4. Creating and facilitating strategic partnerships to advance library engagement in teaching, learning, and research (e.g. EDUCAUSE’s National Learning Infrastructure Initiative, accrediting agencies).
Examples from “old” committees:
Partnership with HBCUs.
Encouraging library science research on preservation and digital archiving.
Collaboration on the National Diversity Conference.

5. Developing methods for monitoring and analyzing trends in pedagogy and the conduct of research.

Examples from “old” committees:
Cyberinfrastructure for e-science.
Intersection with Scholarly Communication.

6. Identifying implications for libraries resulting from the changing global (i.e., international, interdisciplinary, intercultural) nature of scholarly and learning communities.

Examples from “old” committees:
Special collections that reflect local cultures.
Global Resources Network.
I. Transition to a New Committee Structure

The ARL Board has accepted the structure set forth in the Strategic Plan Implementation Team Report as an initial working model and anticipates that the transition to a new committee structure will be complete by October 2005.

The goal of this committee discussion is to identify questions that need to be resolved as the new structure is put into place.

The new committee structure recommended by the Implementation Team is intended to provide ARL member representatives with a greater variety of ways to participate in the work of the association. These include:

- Steering committees will scope and guide ARL’s agenda in the three new strategic directions defined in the plan.

- Task Forces, Subgroups, Working Groups, Discussion Groups will be formed as needed to advance each of the three strategic directions of the association. As appropriate for the assignment, these groups could be populated with ARL member representatives, senior staff from ARL libraries, and/or scholars or other experts.

- An expanded group of ARL Board committees will advance the business aspects of the association.

- Advisory groups will guide self-funded or grant supported initiatives.

- The steering committees of parallel organizations such as SPARC and CNI will continue to guide those efforts.

Resource Document

Recommendation on ARL Committee Structure

(See Implementation Team Report on pp. 14–15 of ARL: A Bimonthly Report, no. 238/239, included in Membership Meeting folder.)

Outcome Expected

Questions or comments on the new structure
2. Review of Current Committee Program Activities

The strategic plan proposes (in the section titled “Redefining Core Programs”) that current program activities be reviewed “to determine if they serve—or could be reshaped to serve—as enablers for advancing the strategic directions.” The plan goes on to suggest that some of the criteria to be considered are:

- Do the program activities advance the Strategic Plan?
- Do the program activities contribute something distinctive that is not available from other organizations?
- Is it possible for an individual library to undertake such activities on its own?
- Could or should the activities be pursued in whole or part by other organizations?

The plan also calls for the application of the full range of financial strategies that are available to support ARL activities. These financial strategies are:

*Member dues* are the primary financial strategy for funding ARL’s core programs. In addition, there are a number of complementary financial strategies that provide additional revenue streams to support ARL activities. These include:

*Cost Recovery Funds*
Funds from the sale of ARL products and services such as publications or registration fees for workshops, webcasts, or conferences. Products or services provided to nonmembers aim to exceed cost recovery within the limits of ARL’s 501-c-3 status as a nonprofit organization.

*Restricted Funds*
Grants and/or contributions or voluntary fees from participating libraries are used to support a specific project or initiative.

*Parallel Organizations*
Separate but closely affiliated organizations created by ARL with other entities to attract membership and funding from beyond the ARL membership to advance shared goals (e.g. CNI, SPARC, Library Copyright Alliance).

The goal of this committee discussion is to use the criteria above to review current activities that fall within the committee’s purview and assess where ARL is working uniquely well and where ARL agenda items are also being addressed elsewhere and could be transferred or undertaken in collaboration with another organization.
Specifically, standing committees are asked to:

1. respond to the steering committee preliminary reports, perhaps suggesting how current activities could be reshaped or identifying task forces or subgroups that could be formed;

2. identify any program activities that do not fall explicitly or obviously within the scope of the strategic directions;

3. consider the strength of ongoing member interest in each activity in this second category, and if there is some interest; and

4. reflect upon what, if any, alternatives to ARL dues support may be available to pursue the activities either inside or outside the ARL framework. Within ARL, this could include subsets of members deciding to self-fund an activity they want to work on together. Other options are to look for another organization to pursue the activity instead of ARL, or, if some ARL funding is available, to undertake the activity as a collaboration between ARL and another organization.

To facilitate this discussion, members are asked initially to compare the charge of this committee with the scope statements for each strategic direction.

Committee members may also wish to consider the results of what the committee has put into action over the recent past and prepare an impact report that could be fed back into the deliberations of the steering committees and membership.

**Resource Documents**

2A. Steering Committees Preliminary Scope Statements (included, see pages 6–10)
2B. A Look Back at ARL Standing Committees & Their Charges (included, see pages 14–17)

**Outcomes Expected**

- Recommendations for the new Steering Committees about program activities that are within the scope of strategic directions
- Recommendations for membership on program activities that are outside the scope of strategic directions
- Ideas for an impact report on committee issues/activities

**3. Elements of a Report to Membership**

From 3:30 p.m. to 5:00 p.m., each committee is asked to make a brief report to the full membership on their discussions re questions on the new committee structure, recommendations about activities within and outside the scope of strategic directions, and as time allows, a report card on past committee accomplishments.

**Outcome Expected**

Agreement on the elements for a report to the full membership.
A Look Back at ARL Standing Committees & Their Charges

The scope and charge of ARL’s standing committees tended to be defined broadly. With active involvement and assistance from Association staff, committee members developed targeted agendas within the scope of their charge. The agendas were adjusted each year based on the greatest need and potential payoff for member libraries. Committee members also provided guidance to the Board and to the Association staff on the development of program capabilities to advance ARL’s previous eight strategic objectives. A brief review of each standing committee is given below in the following order:

- Collections and Access Issues Committee
- Diversity Committee
- Information Policies Committee
- Intellectual Property and Copyright Committee
- Preservation of Research Library Materials Committee
- Research Library Leadership and Management Committee
- Scholarly Communication Committee
- Statistics and Measurement Committee

Collections and Access Issues Committee

This standing committee was formed in January 2003 by merger of two previously distinct committees. It was charged to examine issues raised by new approaches to collection development and access services, including: integrating content and services with research and learning, expanding the availability of resources for research library constituencies, new uses and functions of physical library space, and organizational implications of new roles for libraries. In addition, the committee was expected to kindle links and discussions that could lead to increased synergy among the ongoing activities of the Association on special collections, global resources, portal applications, and other initiatives that expand the availability of resources for research library constituencies.

At its initial meetings in 2003, the committee members considered the broad scope of its charge and decided to focus its agenda on 1) integrating content and services with research and learning and 2) expanding the availability of resources for research library constituencies. To that end, the committee explored among themselves and with guest speakers such diverse topics as: the application of technology to teaching and learning (e.g., SAKAI, LOCKSS); emerging cyber-infrastructure initiatives; efforts to enhance catalog browsing; international library partnerships; cooperative international collection development initiatives; and user-initiated resource sharing activities. Many of these discussions were undertaken in collaboration with the leadership from CNI. The committee also hosted periodic reports from the ARL Task Force on Special Collections, ARL Portal Applications Working Group, the AAU/ARL Global Resources Network, and three agencies of importance to the membership: Center for Research Libraries, the Library of Congress, and Library and Archives Canada. The committee also contributed to the work of the Task Force on New Ways of Measuring Collections.

Diversity Committee

The Diversity Committee was charged to consider strategies that contribute to the promotion and development of research library workforces that are representative of a diverse population and to foster workplace environments where all employees are valued for their uniqueness and personal contributions.
The Diversity Committee agenda addressed 1) recruitment and retention of library personnel from a variety of backgrounds, particularly those from groups traditionally underrepresented in the research library workplace and 2) opportunities for professional development that lead to promotions of librarians from underrepresented groups. The committee plays a central role in the ARL Leadership and Career Development Program and the Initiative to Recruit a Diverse Workforce, selecting candidates and recruiting mentors. The committee also advises on the Diversity Program’s grant and restricted fund activities (e.g., the pilot project to recruit from undergraduates in HBCUs and fundraising to expand the endowment supporting the Initiative to Recruit a Diverse Workforce). The committee also maintains a relationship with the National Library of Medicine, the Association of Library and Information Science Educators (ALISE), and several units within ALA as a means to collaboratively address diversity needs in the library profession.

Information Policies Committee

The Information Policies Committee is charged to help ARL shape and influence national and international information policies that affect the availability, access to and usefulness of research resources. While U.S. legislation and policies are of primary interest, the committee is also asked to monitor and advise on state government actions or international activities that affect the transborder flow of information and access to information among the international community of scholars and researchers. The committee is specifically charged to monitor related Canadian issues via an ongoing relationship with the Canadian Association of Research Libraries. The Committee advises staff on matters regarding the plans and strategies of the ARL program capabilities on Federal Relations and information Policies.

The Information Policies Committee agenda is currently focused on the following ongoing issues: government information access and dissemination programs, telecommunications and networking, privacy and civil liberties, and support of agency programs that are of direct importance to North American research libraries.

Intellectual Property and Copyright Committee

The Intellectual Property and Copyright Committee, formed in 2003, was charged to monitor and influence current developments affecting copyright law, intellectual property at the state, national, and international levels, and research institutions’ management and use of intellectual property. In conjunction with the Scholarly Communication and Information Policies Committees, this committee contributes to the definition of ARL’s strategic activities. This committee, with the Scholarly Communication Committee, developed the ARL Action Agenda on Copyright and Intellectual Property.

The committee agenda was focused on: intellectual property legislation; electronic reserves practices in research libraries and possible litigation; international copyright and intellectual property treaties, in particular, the WIPO development agenda; and, amicus briefs in support of library interests.

Preservation of Research Library Materials Committee

The Preservation of Research Library Materials Committee was charged to advocate for strategies that enable coordinated and comprehensive planning of national preservation activities. It encourages ARL libraries to recognize their responsibilities in preserving their own individual collections as part of the research resources of North America; communicates issues and developments relevant to the management of preservation activities to the ARL membership; recommends as appropriate, to the ARL Board of Directors, actions to be taken by the Association to further national preservation planning or to support member libraries’
preservation activities; and works with the Collections and Access Issues Committee to accomplish the goals of ARL pertaining to the development and use of research library collections. The committee also monitors developments and advises ARL staff on copyright issues related to preservation.

The Committee’s recent agenda was endorsing digitization as a viable preservation reformatting strategy and asserting a leadership role in encouraging community acceptance and use of digitization standards and best practices. In collaboration with CLIR, the Library of Congress, and the University of Texas, the committee also encouraged the identification of issues associated with the preservation of audio collections and an action agenda for addressing the issues.

**Research Library Leadership and Management Committee**

The Research Library Leadership and Management Committee was charged to provide a continuing focus on issues of leadership and management in research libraries as well as in the broader information environment. These issues include planning, service assessment, organizational development, resource management, staff training and human resources development, the broader application of technology to library functions and services, and the role of the library in the broader information services structures of the research institution.

The Leadership Committee pursued its charge by monitoring developments, determining critical issues requiring ARL attention, informing members, and designing strategic responses that could serve to strengthen the management of research library resources. The committee was also charged to serve as a general advisory body to OLMS.

The Committee’s recent agenda included identification of core elements in library staff development programs and oversight for the development of several new national programs that focus on targeted recruitment and succession planning in ARL libraries. A recent example is the IMLS-funded ARL Academy: Careers in Academic and Research Libraries, a collaborative program between ARL and three library schools to prepare PhDs for careers in ARL libraries. The same meetings that led to the ARL Academy, between the Committee and library school educators, also led to an IMLS-funded research project to study supply and demand of subject specialists in research libraries and work with directors of ARL libraries to create appropriate recruiting approaches. The ARL Research Library Leadership Fellows Program, a self-funded program that prepares mid-to upper-level administrators for directorships in large ARL libraries, is another example of a model for succession planning that has grown out of the Committee’s agenda.

**Scholarly Communication Committee**

The Scholarly Communication Committee was charged to help the Association understand, contribute to, and improve systems of scholarly communication. The committee is charged to monitor developments, determine critical issues requiring ARL attention, inform members, and design strategic responses that can serve to influence the future of scholarly communication. The committee also advises and guides the ARL staff on the plans and strategies of the Office of Scholarly Communication.

The committee’s recent agenda was to pursue strategies to promote open or barrier-free access, to develop a deeper understanding of changes in the disciplines, to expand awareness among faculty of the dysfunctions of the marketplace, to promote change in antitrust policies for scholarly publishing, and to build alliances between libraries and university presses. Many of these discussions were undertaken in collaboration with the leadership of SPARC.
Statistics and Measurement Committee

The Statistics and Measurement Committee charge was to describe and measure the performance of research libraries and their contribution to teaching, research, scholarship, and community service. The focus has been on measuring the continuing and emerging realities of the modern research library. The committee advises the Statistics and Measurement program on traditional measures of collections, budgets, and staffing, while seeking credible indicators for research library performance, service, consortia arrangements, electronic information, Internet influence, and ways that students and faculty interact with each other and with research libraries. In collaboration with the Research Library Leadership and Management Committee, and other interested member leaders, the Statistics and Measurement Committee continued developing an agenda of new measures for research libraries.

The committee’s recent agenda was the measurement of service quality for digital libraries, the measurement of expenditures for and use of e-resources, the impact of networked electronic services, the impact of consortia on data collection, learning outcomes, and most recently, new ways of measuring research library collections.

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