

**REPORT**

**VISIONS FOR VALE  
VALE Strategic Planning Retreat**

**June 8, 2006**

**UMDNJ-School of Health Related Professions, Scotch Plains**

**Submitted to  
VALE Executive Committee  
Karen Avenick  
July 10, 2006**

**Visions for VALE**  
**June 8, 2006**  
**Executive Summary**

On June 8, 2006, VALE held its second planning retreat. Building on the strategic plan envisioned on March 12, 2002, the group (over 40 representatives from 36 member institutions) articulated new directions and priorities for VALE for the next three to five years.

Dr. George Pruitt outlined his ideas about the current library and academic environment in New Jersey.

Judy Cohn, Chair of the VALE Executive Committee, outlined VALE's accomplishments in the past four years.

Several members submitted and presented papers giving their vision of VALE in the future:

- Scherelene Schatz - improved resource sharing
- Ruth Bogan - digital institutional educational repository
- Jim Marcum - regional networks of book collections
- Ed Corrado - a common Open Library System (OLS).
- Rich Sweeney – extension of VALE's collaborations
- Ray Schwartz - leverage new business and service opportunities
- Jim Farrugia and Dorothy Meaney - leverage local work on the management of ScienceDirect titles and share of best practices in electronic resource management.
- Mary Mallery - cooperative collection management (not presented; copies distributed)
- David Pinto – Council and VALE proposed reorganization

A total of twenty-eight initiatives resulted from the brainstorming session. The top priorities were:

1. Negotiate with aggregators so that we get what we want, not what they want to give us – 247 votes
2. Implement universal borrowing among member institutions – 246 votes
3. Plan and implement collaborative collection development and last copy availability – 239 votes
4. Share books more fluidly – 237 votes
5. Develop a statewide catalog with a common ILS – 236 votes
6. Move from a volunteer organization to a sustainable organization – 232 votes

Next steps include discussion and acceptance by the VALE Executive Committee of the strategic directions identified at the planning retreat. Prioritizing the highest voted strategic directions and assessing the resources needed to begin working to fulfill them need to be addressed. The strategic priorities receiving the highest number of votes reflect the areas of concentration and focus for VALE operations for the next three to five years.

**VISIONS FOR VALE**  
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**1. Introduction**

On Thursday, June 8, 2006, representatives from VALE member libraries convened to review and update the organization's strategic plan. Over forty librarians, representing approximately 36 member libraries participated in the discussions as well as several representatives from the NJ State Library, NJ regional library cooperatives and PALINET (See Appendix A). The goal of the session was to articulate new directions and priorities for VALE over the next three to five years.

In order to solicit new and/or innovative ideas for the group to consider, a call for papers was distributed to all New Jersey academic librarians via the VALE and Council listservs in April (see Appendix B). A total of nine papers were submitted and posted to the VALE website for participants to read prior to the June 8 Retreat. Authors of the papers were invited to form a panel at the Retreat and each was asked to provide a three-minute synopsis of his/her idea for new collaborative directions for VALE. A complete list of the authors and their papers may be found in Appendix C or (as of this writing) at <http://www.valenj.org/newvale/eventswkshps/2006/retreat/proposals.shtml>.

The day was organized to provide participants with:

- A broad perspective on the current library and higher education environment in New Jersey
- A summary of VALE's accomplishments since the last Retreat in 2002
- Opportunities to suggest new visions and/or initiatives to guide VALE over the next three to five years
- An historical overview of VALE and the Council of New Jersey College and University Deans, Directors and University Librarians as a foundation for considering future realignment of the two organizations
- An opportunity to revisit the accuracy of VALE's mission statement in light of possible new directions.

The session started shortly after 9:30 am and concluded about 3 pm. The group acknowledged that the day's activities had succeeded in identifying many possible new initiatives.

**2. New Jersey's Current Higher Education Environment**

Dr. George Pruitt, President of Thomas Edison State College and current chair of the New Jersey Presidents' Council, outlined his ideas about the current library and academic environment in New Jersey. In view of the fact that the state is facing a difficult budget year and that the Governor has proposed an unprecedented \$300 million cut to higher education, academic

institutions across the state will be asked to make difficult fiscal decisions. Dr. Pruitt expressed the opinion that the fiscal crunch is not so much a short-term shortfall in revenue, but a more fundamental problem emanating from the state's tax structure. Moreover, New Jersey's many municipalities, school districts and other governmental agencies are expensive to operate because they are numerous (566 municipalities and 604 school districts) and small. He used the analogy of an eight-lane bowling alley and a \$1 million bank branch, neither of which is cost effective in a business sense because their profit margins are not sustainable. New Jersey, he asserted, is a state of eight-lane bowling alleys and \$1 million bank branches. It will take courage and hard work to change the environment. He predicted that FY2007 will be difficult, as will the next two-three years, even if the tax structure is changed. Ending on a more positive note, Dr. Pruitt stated that the public has high regard for NJ's university and college presidents and their trustees. College and university presidents are working with the various state budget committees to reduce the budget cut to higher education from the original amount of \$300 million to \$100 million.

### **3. VALE Accomplishments, 2002-2006**

Judy Cohn provided a progress report on VALE strategic directions since the last planning retreat held in March 2002 at which the following objectives were identified. See Appendix E for the full list of accomplishments.

- (1) Expanding and sustaining an effective funding stream through collaboration
- (2) Actively pursuing advocacy and public relations efforts
- (3) Shaping a communications plan that will enhance the visibility of VALE to its constituencies, the state legislature and the public
- (4) Developing and implementing a remote reference service
- (5) Developing and implementing a shared information literacy Web site
- (6) Securing funds to publish, on the Web, appropriate and unique local databases
- (7) Identifying other potential areas of collaboration
- (8) Conducting ongoing assessments to measure accomplishments

### **4. Visions for VALE Panel**

Seven of the nine authors of submitted papers formed a panel and each provided a brief summary of his/her ideas. The paper on the future of the Council was discussed separately towards the end of the day and the author of the paper on cooperative collection development was unable to present. Marianne Gaunt, Rutgers University Librarian, served as the panel moderator.

- Scherelene Schatz, New Jersey State Library, proposed improving end-user access to materials by implementing a program of unmediated interlibrary loan using the JerseyCat system.
- Ruth Bogan, Georgian Court University, suggested the collaborative development of a digital institutional repository with an initial focus on providing access to digitized theses in education.

- Jim Marcum, Fairleigh Dickinson University, proposed the concept of developing regional networks of book collections to maximize access to scholarly monographs as faculty and research needs at various institutions change and evolve.
- Ed Corrado, The College of New Jersey, offered the vision of developing a common Open Library System (OLS). Based upon open-source software, the new OLS would replace the individual IL systems of participant libraries and offer many additional advantages.
- Rich Sweeney, New Jersey Institute of Technology, described four new ways VALE's collaborations could be extended for benefit to all.
- Ray Schwartz, William Paterson University, offered a vision in which VALE would assertively seek out and leverage new business and service opportunities, thus maintaining its relevance to user needs in a world of rapidly changing technologies.
- Jim Farrugia and Dorothy Meaney, Drew University, advocated leveraging local work done on the management of ScienceDirect titles and sharing best practices in electronic resource management.
- One additional paper was submitted by a colleague who was unable to attend, Mary Mallery, Montclair State University – Cooperative collection management. This paper was acknowledged but not discussed.

In summary, Marianne Gaunt remarked on common themes evident in several of the presentations:

- Make better use of staff resources and talents
- Focus on meeting customer needs
- Leverage existing systems and expertise
- Develop common infrastructures where costs can be spread across multiple libraries
- Support research and demonstrate library impact
- Work in areas where there is a critical mass, either physical or digital
- Value our “brand” and capitalize on our investments
- Promote VALE as a unified entity, not separate institutions.

As a transition to considering the panel's initiatives and others identified by the participants, Gaunt offered the following criteria for determining which ideas might maximize our collaborative synergy:

- Which project(s) will have the greatest return on investment?
- Which project(s) will have the greatest value to our users?
- Which project(s) will best leverage existing expertise and resources?
- Which project(s) can be most easily implemented?
- Which project(s) offer the best risk/safety ratio?

## **5. Identifying and Prioritizing Initiatives**

Participants broke into five groups of about nine people each to discuss the initiatives that each thought was important. Overall, twenty-eight ideas were generated and shared. Some ideas were

similar and were conflated, while others remained discrete ideas. These twenty-eight potential initiatives can be found in Appendix D.

During lunch, participants were asked to review the 28 initiatives and identify the three initiatives they felt were most important to the continuing success of VALE. Based upon the numbers of votes received, the list of initiatives was narrowed to thirteen. In an activity following lunch, participants prioritized these thirteen ideas using a forced choice methodology. In this exercise, each participant ranked every initiative against all others to form a rank order. The individual scores were then summed to provide an overall aggregate ranking. The following scores were noted:

1. Negotiate with aggregators so that we get what we want, not what they want to give us – 247 votes
2. Implement universal borrowing among member institutions – 246 votes
3. Plan and implement collaborative collection development and last copy availability – 239 votes
4. Share books more fluidly – 237 votes
5. Develop a statewide catalog with a common ILS – 236 votes
6. Move from a volunteer organization to a sustainable organization – 232 votes
7. Strengthen advocacy efforts beyond the New Jersey Knowledge Initiative – 218 votes
8. Develop a mutual talent pool for sharing staff expertise among member institutions – 207 votes
9. Expand the New Jersey Digital Highway project by including masters' theses – 206 votes
10. Develop a marketing campaign for both internal and external purposes. Include a PR campaign to the media – 188 votes
11. Work collaboratively with other organizations, for example NJLA, NJEdge, business, community and service group; develop a focus on the R&D community – 180 votes
12. Offer users a “My Library” concept – use the iPod model – 161 votes
13. Perform a frequent swat assessment of VALE activities – 56 votes

The VALE Executive Committee will consider this input as it sets plans and goals for the coming years. They will review the full list of strategic directions and develop action steps to insure that the organization is ready and able to plan and implement the directions which its members have indicated are the most important. Some of the initiatives relate to changes in the organizational structure while others are more print oriented, and another group proposes deploying technologies not currently used. There is an underlying assumption that VALE will continue to broker electronic resources for its members.

## **6. Discussion of Relationship between the Council and VALE**

The possibility of reorganizing and/or realigning the Council of New Jersey College and University Library Deans, Directors and University Librarians and VALE was presented and discussed at the May meeting of the Council and the substance of David Pinto's submitted paper, "[\*Proposal for the Reorganization of the Council and VALE\*](#)". Andrea MacRitchie, incoming President of the Council, and Library Director at Union County College, provided a brief history

and overview of the relationship between VALE with the Council. Following discussion the group recommended that the VALE Executive Committee and the current Council leadership appoint a team to review the relationship further and make recommendations for the future organizational ties of the two entities.

## **7. Review of VALE's Mission Statement**

In a final exercise, the participants reviewed and reaffirmed the current VALE mission statement. In light of possible new initiatives, the mission remains relevant and valid.

### **VALE Mission Statement (2002)**

The Virtual Academic Library Environment (VALE), a consortium of New Jersey college and university libraries and the New Jersey State Library, is dedicated to furthering excellence in learning and research through innovative and collaborative approaches to information resources and services.

## **8. Recommendations and Next Steps**

The participants at VALE's second planning retreat were an enthusiastic and dedicated group. Each is committed to VALE's continued success. The VALE Executive Committee needs to develop a strategy for selecting which directions should be addressed first. Karen Avenick, retreat facilitator, offers the following methodology for addressing the newly identified strategic directions:

- Set up teams to address the top six projects. Some of these teams will be cross-functional.
- Develop a steering committee. This team will create a work plan to ensure that the teams complete their work
- The work plan will consist of:
  - Establish the direction – the goal for the specific initiative.
  - Determine who will be involved – the stakeholders, the providers
  - How the initiative will unfold – what are the action steps required to make the initiative a reality
  - Time line – when the work will be accomplished
- The steering committee should monitor the academic environment and the remaining initiatives to be sure that they respond to constantly and rapidly changing need.

In addition, the steering committee needs to review the accomplishments of the 2002 Planning Retreat to ensure that the stated goals remain valid. If so, the group should determine if the new initiatives build on past successes or if new goal statements need to be crafted to create a context for the new initiatives. Since few organizations can accomplish large numbers of goals and initiatives, setting priorities and realistic targets for a largely volunteer organization such as VALE will be an especially important task for the executive committee.

## **9. Conclusion**

The group accomplished a great deal on June 8, 2006. The long list of initiatives and priorities reflects the creativity and impact of VALE on its members. I want to thank Judy Cohn, Anne Ciliberti and Judith Jeney for their planning expertise and good humor in preparing for the day. Thank you is also extended to Marianne Gaunt and Andrea MacRitchie for their presentations as well as to all of the panelists who shared their insights and directions for the future of VALE. Melissa John, Rutgers University Libraries administrative intern, is acknowledged for sharing her report of the day, sections of which are used in this document.



**Appendix A: Participants at the Visions for VALE Planning Retreat  
June, 2006**

1	Bergen Community College	Denholm	Pat
2	Berkeley College	Doty	Marlene
3	Burlington County College	Briant	Susan
4	Caldwell College	Ladany	Mary
5	Camden County College	Getaz	Joan
6	Centenary College	Madacsi	Nancy
7	CJRLC	Paul	Connie
8	College of St. Elizabeth	Chervenie	Bro. Paul
9	County College of Morris	Cohn	John
10	Cumberland County College	Schmid	Patti
11	Drew University	Farrugia	Jim
12	Drew University	Meaney	Dorothy
13	Drew University	Scrimgeour	Andrew
14	Facilitator	Avenick	Karen
15	Fairleigh Dickinson University	Marcum	Jim
16	Georgian Court University	Bogan	Ruth
17	Gloucester County College	Crocker	Jane
18	Hudson County Community College	Reilly	Pat
19	INFOLINK	O'Connor	Cheryl
20	Mercer County Community College	Price	Pamela
21	Middlesex County College	Ostar	Lewis
22	Monmouth University	Gardner	Rachel
23	Montclair State University	Hunt	Judith Lin
24	Montclair State University	Mallery	Mary
25	Montclair State University	Rodriguez	Luis
26	New Jersey City University	Almodovar	Juan
27	New Jersey State Library	Blake	Norma
28	New Jersey State Library	Daze	Colleen
29	New Jersey State Library	Schatz	Scherelene
30	NJCU	Bulaong	Grace
31	NJIT	Sweeney	Richard
32	Ocean County College	Huacuja	Yvonne
33	Palinet	Martire	Chris
34	Palinet	Wilt	Cathy
35	Passaic County Community College	Fallon	Greg
36	Ramapo College	Jeney	Judith
37	Raritan Valley Community College	Maginn	Julie
38	Raritan Valley Community College	Nebeker	Birte
39	Richard Stockton College	Pinto	David
40	Rider University	Chickering	William
41	Rider University	Weeks	Meghan
42	Rutgers University	Gaunt	Marianne
43	Rutgers University	Hoover	Dave

44	Seton Hall University	Stern	Richard
45	St. Peter's College	Myers	Charles
46	The College of NJ	Corrado	Ed
47	The College of NJ	Pavlovsky	Taras
48	UMDNJ	O'Rourke	Kerry
49	UMDNJ	Skica	Janice
50	UMDNJ	Tran	Susan
51	UMDNJ	Cohn	Judy
52	UMDNJ / Camden	Miller	Barbara
53	Union County College	MacRitchie	Andrea
54	VALE	Avrin	Judy
55	William Paterson University	Ciliberti	Anne
56	William Paterson University	Hutchison	Jane
57	William Paterson University	Schwartz	Ray

## **Appendix B: Visions for VALE: Planning Retreat & Call for Papers**

- WHAT?** A chance to share your vision and add your voice and ideas! An opportunity to influence new collaborative directions for VALE over the next three to five years! What collaborative ventures should VALE be considering for the future? In what new ways can the synergy of our combined efforts improve academic library services across the state?
- WHO?** Staff at all VALE member libraries are invited to participate in the VALE planning process by submitting their ideas for collaborative projects for consideration as VALE charts new strategic directions.
- HOW?** Prepare a brief (one to two page) paper describing needs/opportunities/new directions to be considered at the upcoming Visions for VALE planning retreat (details below). Think outside the box, be creative, thought-provoking, forward-thinking!
- WHEN?** Submit papers by May 26, 2006 to Dr. Anne Ciliberti at [cilibertia@wpunj.edu](mailto:cilibertia@wpunj.edu). Papers will be published on the VALE web site and all ideas will be considered at the Visions for VALE planning retreat. Authors will be invited to attend the retreat and two will be selected by lottery to receive \$50 Barnes & Noble gift certificates.
- RETREAT?** The VALE Executive Committee will be hosting a day-long planning retreat for all VALE member library deans and directors, VALE committee chairpersons and authors of submitted papers on Thursday, June 8, 2006. Details to follow!

## Appendix C: Visions for VALE Submitted Papers

- [\*A Vision for VALE\*](#) Submitted by Ed Corrado, The College of New Jersey, and Jim Robertson, NJIT
- [\*Electronic Resources: Some Opportunities for Sharing\*](#) Submitted by James Farrugia on behalf of several Drew University librarians
- [\*North Jersey Regional Network Research Library: Creating Dynamic Print Book Collections\*](#) Submitted by James Marcum, Fairleigh Dickinson University
- [\*Proposal for Digital Repository for Graduate Theses in Education\*](#) Submitted by Ruth Bogan on behalf of Georgian Court University Library staff
- [\*Proposal for the Reorganization of the Council and VALE\*](#) Submitted by David Pinto, Richard Stockton State College, on behalf of the Council of NJ College & University Library Deans, University Librarians & Directors
- [\*Service Proposal from the Resource Sharing Committee\*](#) Submitted by Scherlene Schatz, NJ State Library, and Judy Gardner, Rutgers University, on behalf of the VALE Resource Sharing Committee
- [\*So Many Projects, So Little Time: Visions for VALE\*](#) Submitted by Ray Schwartz, William Paterson University
- [\*Vision for VALE 2007-2010\*](#) Submitted by Richard Sweeney, NJIT
- [\*Visions for VALE 2006: Cooperative Collection Management Proposal\*](#) Submitted by Mary Mallery, Montclair State University, on behalf of the VALE Cooperative Collection Management Committee.

## **Appendix D: Master List of All Suggested Initiatives**

1. Develop a statewide catalog – one ILS
2. Institute a mutual talent pool, - share expertise among member institutions
3. Build on the New Jersey digital highway – begin with a thesis repository
4. Offer users a “My Library” concept – use the iPod model
5. Put member library holdings on Google Scholar
6. Share books more fluidly
7. Implement universal borrowing among member institutions
8. Start and continue a marketing campaign both on campus and outwardly to organizations – include a PR campaign to the media
9. Move from a volunteer organization to a sustainable organization
10. Develop a virtual catalog using Endeca
11. Implement information literacy and a shell for information literacy using discipline-specific models statewide
12. Collaborate and share outside of New Jersey
13. Plan and implement unmediated resource sharing
14. Enhance VALE communication beyond email
15. Strengthen advocacy beyond the New Jersey Knowledge Initiative
16. Work collaboratively with other organizations, for example NJLA, NJEDge, business, community and service group – develop a focus on the R&D community
17. Encourage full membership participation in virtual reference
18. Find ways to share best practices and establish pilot projects based on results
19. Develop new librarians - address recruitment and training issues
20. Emphasize and better educate librarians in optimized use of JerseyClicks
21. Expand and develop digital video collections
22. Negotiate with aggregators so that we get what we want, not what they want to give us
23. Plan and implement collaborative collection development and last copy availability
24. Institute grant writing with R&D organizations – collaborate with other campus entities
25. Synergize
26. Meet to evaluate initiatives
27. Institute a VALE research assistance group
28. Perform a frequent swat assessment of VALE activities

## **APPENDIX E: VALE ACCOMPLISHMENTS**

### **PROGRESS REPORT SINCE LAST VALE PLANNING RETREAT WITH COUNCIL DIRECTORS**

1. Expanding and sustaining an effective funding stream through collaboration
  - a. Participating with the NJSL in the funding of the NJKI bringing \$6 million in electronic resources to all academic libraries
  - b. Worked to conduct the first internal audit of operations including licenses, finances, and general procedures with only minimal recommendation finding VALE and its affairs to be effectively managed
  - c. Participated in an IMLS grant submission with the WPUNJ library to build the NJ digital video consortium
  
2. Advocacy and public relations efforts
  - a. Participating with the NJSL in the funding of the NJKI bringing \$6 million in electronic resources to all academic libraries
  - b. Recognized as a valued partner in higher education as evidenced in the Report of the Higher Education Transition Policy Group submitted to Gov-Elect Jon S. Corzine, in its stated objective to “strengthen the state’s higher education research capacity” by its recommendation to “invest in collaborative research programs (e.g., Edison Innovation Fund, Vale Collaboration, Commission on Science and Technology)
  
3. Shaping a communications plan that will enhance the visibility of VALE to its constituencies, the state legislature and the public
  - a. Publicity / Communications Committee expanded its charge and developed a Public Relations and Communications plan to better channel internal and external communications
  - b. Updated, printed and distributed new VALE leaflet for wide dissemination to member libraries, administrators and other related organizations
  - c. Developed and distributed second VALE Biennial Report (2002-2003)
  - d. Redesigned and updated the VALE web site
  
4. Developing and implementing a remote reference service
  - a. VALE member libraries participating in QandA NJ
    - i. Creation of academic queue to provide a streamlined service for college students
    - ii. Over 6500 online transactions in 2005 with 13 participating college and university libraries
  
5. Developing and implementing a shared information literacy Web site
  - a. Shared information literacy committee established
    - i. Product developed to be rolled out and shared with VALE member libraries in mid-2006

- b. Wrote and submitted a FIPSE grant proposal for funds to advance the project (unfunded)
- 6. Securing funds to publish, on the Web, appropriate and unique local databases
  - a. Developed a shared information literacy committee charged with project implementation
- 7. Identifying other potential areas for collaboration
  - a. Created a Digital Video Planning Committee to develop a plan for licensing video over IP content to member institutions
  - b. Assist member libraries in understanding, justifying and acquiring EZProxy software to streamline remote access to online resources and to provide a secure, easy to manage authentication system eliminating the need to locally manage usernames and passwords
  - c. Developed preferred licensing terms to facilitate working with vendors and provide expected terms and conditions
  - d. Charged a “Last Copy Working Group” to study retention issues in NJ’s academic libraries
    - i. Produced a thorough White Paper presented at the Annual Users’ Conference and widely distributed among member libraries
    - ii. Evolved into the Cooperative Collection Management Committee charged with taking issues to the next level
  - e. Developed a VALE Union Catalog using the SiteSearch software.
- 8. Conducting ongoing assessments to measure accomplishments
  - a. Wrote an RFP soliciting proposals to assess, document and report the economic value and benefits of VALE services and programs to VALE member libraries and their constituents, and NJ higher education community
  - b. Eleven members formed a VALE group and conducted the national LibQUAL survey.
  - c. Conducted a survey of VALE of librarians to determine the level of satisfaction with the growth and development of VALE.
  - d. Planned and sponsored a day-long workshop on electronic usage statistics
  - e. Conducted a survey of VALE Directors to elicit potential areas for future collaboration.