



## Knowledge and Library Services Strategy Documents – University of Mumbai Pre-readings for July 31, 2012 Session at Harvard Business School

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#### Please also read:

Article on Dean Nohria’s 4+2 Formula for Sustained Business Success at: <http://hbswk.hbs.edu/item/3578.html>  
Update on the Dean Nohria’s Priorities at: <http://www.hbs.edu/about/docs/priorities-fpo-cmyk-120203.pdf>

## Knowledge and Library Services Enduring Goals

1. Deliver the greatest possible value to KLS's customers by integrating our expertise and resources in support of their teaching, learning, and research.
2. Build and enrich a knowledge and information ecosystem that delivers what the customer needs when they need it, seamlessly.
3. Be the "trusted advisor" for HBS in knowledge, information and learning practices.

## Knowledge and Library Services Three-Year Goals

Over the next three years, KLS will provide our priority audiences with distinctive information services, resources, and expertise so that they excel in their work. KLS's recent Strategy Reflection (Fall 2011) resulted in a restatement of our mission, vision, and priorities. They form the foundation for creating the next generation "Baker" -- building on the tradition of this pre-eminent business library and providing thought-leadership in shaping the 21<sup>st</sup> century academic library. The Dean's recommitment to HBS's Intellectual Ambition is our primary focus.

### ***Research and Course Support***

- Partner with faculty, their proxies, and doctoral students to increase research productivity through innovative methodologies and research program/data management. Use our network of research support organizations (e.g., Center for Geographic Analysis, Office of Scholarly Communication, IQSS, etc.) our unique collections, and our information management tools to enable faculty innovation in research program/project design (e.g., data mining, text analysis, etc.).
- In partnership with customers and stakeholders, create information-rich, contextually relevant learning environments, including a focus on FIELD, EC course redesign, EE program development and revision, and the Doctoral Program review findings.
- Support the Dean's Office and the Dean's Management Group's exploration of innovation requests in areas such as digital scholarship, integrative research support, impact measures, tracking nascent ideas and establishing an HBS-wide competitive intelligence program that gathers information and insights from across the School using a collaborative, knowledge construction approach.

### ***Information Products***

- Design and implement an information product strategy and lifecycle management program that utilizes our unique collections and knowledge of the world of business information. Innovate in the use of technology to create and deliver information products that meet users' needs and exemplify thought leadership for using information to add value.
- To highlight our unique collections for course development and scholarship, develop at least one new exhibit and one collection guide each year.

### ***Information Management Services***

- Define and invest in an information management infrastructure/platform and service in support of iTRAC projects and critical customer services (e.g., Intranet, Faculty and Research Web site, Digital Media Asset Management).
- Meet academic and program administration needs for managing their information, specifically with respect to findability, data management, taxonomy, metadata, analytics, and information lifecycle management so that the content created at HBS can be easily found, aggregated and reused. Participate in iTRAC projects so that information management standards ensure a quality end product.
- With the Research Directors, DRFD, the Harvard Library Office of Scholarly Communication determine how to integrate our information and data management expertise to support effective research data management and use (e.g., practice, tools, repositories, search, reuse, etc.).

### ***Collection Development/Content Sourcing and Management***

- Implement a collection development plan that supports the priorities of HBS research and academic programs. Align with the Harvard Library's collection policy development efforts.
- Refine the economic model for funding the acquisition of and access to information required to support research and academic programs.
- Work with faculty and External Relations to implement a program to identify and collect unique contemporary business and industry materials in priority geographies. (Note the dependency on a funding model to facilitate identification, selection, and incorporation into Baker Library collections and an information management infrastructure to make the material "findable" and reusable over time.)
- Implement a communication program to increase the awareness of content and services available to support research and teaching.
- Define and implement a digital preservation program (i.e., people, processes, technology) that enables us to extend our collecting formats, make them accessible over time, and reusable in a variety of ways (i.e., products and sites).

## Knowledge and Library Services Strategic Shifts

Strategic Shifts	FY07	FY08	FY09	FY10	FY11
<b>Integrate with Research and Course Development</b>	<ul style="list-style-type: none"> <li>3 pilot MBA projects</li> </ul>	<ul style="list-style-type: none"> <li>34 projects</li> <li>Model developed</li> </ul>	<ul style="list-style-type: none"> <li>36 projects</li> <li>Develop - 3</li> <li>Revise - 2</li> <li>Enhance – 31</li> </ul>	<ul style="list-style-type: none"> <li>79 projects</li> <li>Develop - 9</li> <li>Revise - 9</li> <li>Enhance – 53</li> </ul>	<ul style="list-style-type: none"> <li>92 projects</li> <li>Develop – 16</li> <li>Revise – 10</li> <li>Enhance - 66</li> </ul>
<b>Organize the School's priority information</b>	<ul style="list-style-type: none"> <li>Catalog books</li> <li>Socialize info mgt</li> </ul>	<ul style="list-style-type: none"> <li>Catalog electronic info</li> <li>Institutional Memory (IM)</li> <li>Info Lifecycle Mgt</li> </ul>	<ul style="list-style-type: none"> <li>Finish IM &amp; Centennial Assets</li> <li>Start Scholarly Assets</li> <li>Stds for SharePoint</li> </ul>	<ul style="list-style-type: none"> <li>RIS, LMS</li> <li>Content types</li> <li>Web content mgt</li> <li>Search/Findability</li> </ul>	<ul style="list-style-type: none"> <li>Findability</li> <li>Analytics program</li> <li>HBS IM practice</li> <li>Data curation &amp; mgt</li> <li>iTRAC large projects</li> </ul>
<b>Move to electronic products and services</b>	<ul style="list-style-type: none"> <li>Status Quo</li> <li>2.5X electronic vs. print expenditure</li> </ul>	<ul style="list-style-type: none"> <li>First Knowledge Center – BBOP</li> <li>HC web properties</li> <li>2.9X electronic vs. print</li> </ul>	<ul style="list-style-type: none"> <li>Institutional Memory</li> <li>Agribusiness Knowledge Center</li> <li>OPM eBaker</li> <li>2.7X electronic vs. print</li> </ul>	<ul style="list-style-type: none"> <li>11 research/course support ShareSites</li> <li>2.6X electronic vs. print</li> </ul>	<ul style="list-style-type: none"> <li>Self-service support via Knowledge Centers, Web parts for ShareSites and Learning Hub</li> <li>2.7x electronic vs. print</li> </ul>
<b>Support Global Research and Education</b>	<ul style="list-style-type: none"> <li>No Focus</li> </ul>	<ul style="list-style-type: none"> <li>Alliance with CBS</li> <li>Network with European universities</li> <li>Relationship with HBS Research Centers</li> <li>Global databases added (China, India)</li> </ul>	<ul style="list-style-type: none"> <li>Network w/Chinese universities, Harvard</li> <li>Launch GKEN – 40</li> <li>Track global aspect of research support – 269</li> <li>Q3 -1<sup>st</sup> sourcing in China</li> </ul>	<ul style="list-style-type: none"> <li>Partnership with APRC</li> <li>China content resource network developed</li> </ul>	<ul style="list-style-type: none"> <li>APRC and IRC</li> <li>Economic model for content, including global support</li> <li>India content resource network developed</li> </ul>
<b>Increase reach of faculty knowledge dissemination</b>	<ul style="list-style-type: none"> <li>Working Knowledge website and newsletter</li> </ul>	<ul style="list-style-type: none"> <li>Working Knowledge for Exec Ed, Publishing, media</li> <li>WK moved to daily content</li> </ul>	<ul style="list-style-type: none"> <li>Economic Crisis site</li> <li>Working Knowledge for Initiatives</li> <li>Alignment with Marketing Plan</li> </ul>	<ul style="list-style-type: none"> <li>Analysis to support FY11 <i>Working Knowledge</i> redesign</li> </ul>	<ul style="list-style-type: none"> <li>Increase junior faculty representation</li> <li>Marketing &amp; Communication plan</li> </ul>
<b>Harvard Integration</b>	<ul style="list-style-type: none"> <li>University Library Council (ULC)</li> <li>ULC committees</li> </ul>	<ul style="list-style-type: none"> <li>ULC</li> <li>ULC Standing Committees</li> </ul>	<ul style="list-style-type: none"> <li>Harvard Task Force on University Libraries</li> <li>ULC Convening Com.</li> </ul>	<ul style="list-style-type: none"> <li>Library Implementation Working Group (LIWG)</li> </ul>	<ul style="list-style-type: none"> <li>LIWG</li> <li>Professional Schools shared services</li> </ul>

## Knowledge and Library Services Strategy Map

**Vision:** We are the world renowned leader in knowledge of business-relevant information, unique business-related content, and the innovative user experience with information and knowledge assets for business education and research.

### CUSTOMER PERSPECTIVE

- C1. Support me in my interdisciplinary and dynamic research, teaching, and learning activities.
- C2. Give me easy, 24/7, personalized, universal access to global business information.
- C3. Support my collaborations with my networks of colleagues and peers.
- C4. Help me manage my information.

### INTERNAL PROCESSES PERSPECTIVE

- I1. We are innovative and experimental in our approach to providing products, services, and content to our customers.
- I2. We are the thought leaders at HBS for information and knowledge asset management
- I3. We focus on the user experience, integrating our products, services, and content seamlessly into the work processes of our customers, 24/7.
- I4. We develop and maintain partnerships within and outside of HBS to support the work we do for and with our customers.
- I5. We follow a rigorous project management approach that enables consistent, high quality results.

### EMPLOYEE PERSPECTIVE

- E1. I am passionate about my work and am focused on achieving the KLS mission.
- E2. I am collaborative, innovative, service-oriented, and accountable.
- E3. I am committed to my own lifelong learning and to supporting the lifelong learning of my customers.
- E4. I am knowledgeable about my customers' requirements and engage in program management, projects, and/or planning to meet them.
- E5. I am a flexible, cross-disciplinary, informed risk-taker.
- E6. I reflect, evaluate, think critically, and share knowledge in performing my work.

### FINANCIAL PERSPECTIVE

- F1. We meet our budget targets.
- F2. We optimize the use of our existing resources.

## Knowledge and Library Services Future State 2011

In 2011, the reach of the Web and the effects of globalization, among other factors, have further transformed the way we live and work, learn and educate. User-created and self-published content such as blogs and posts on the Web have become far more accepted as a means of disseminating scholarly work, and the Web itself is the starting point for most information research. The sheer volume of electronic information available overwhelms attempts at filtering, finding, and managing it. Moreover, less and less digital content has a paper equivalent. New avenues have opened with advances in search and metadata technologies, as well as in mobile devices, virtual worlds, and social software (collaboration tools). These advances allow greater personalization of services and products in all segments of the information industry. They also enable more innovative research and teaching environments, in which geographically dispersed communities of scholars and students can, in real time, jointly create information and aggregate data.

Answering the question of who owns the information on the Web has been trailing behind the technologies that have spurred new forms of content creation and use. The forms of copyright-based ownership model of the publishing industry continue to be debated within the scholarly community. New attempts to regulate and standardize “open-source publishing” have not yet taken firm hold, nor has academic recognition of new forms of publishing to include in metrics for scholarly authority and attribution. Peer-reviewed publications still drive the U.S. scholarly infrastructure; however, a new, powerful wave of open-access peer review is gaining strength across the globe, pressing for new forms of financing scholarly work. Europe is embracing the open-access model by centralizing institutional publications in a single repository open freely to all European universities. Such universal access encourages global research and collaboration, and provides a forum for questions of intellectual property rights, collection policies, and archival preservation. Individual ownership of intellectual property continues to be complicated by the ease with which information is shared and “re-purposed.”

Harvard is active in opening access to scholarly research results. The Office of Scholarly Communications, established in 2008 as an open-access university-wide institutional repository, is capturing a significant percentage of scholarly output of several Harvard faculties. Discussions now focus on the inclusion of new forms, such as simulations, software, datasets, annotations and aggregates thereof. In various pockets, the University already leverages text analysis and data mining techniques to uncover information patterns and research trends, particularly where interdisciplinary research and education occur. Data sets created in the research process are now available alongside the analysis and findings. Meta data registries make it easier to find the information, although a managed repository is seen to increase this capability. University librarians are examining the appropriate modes of research support, trying to balance their investments in commercial content against “in-progress” online-only resources created by scholars.

Greater cross-University collaboration and integration has resulted in new joint degree programs. The University is building rich networks of data and people, and firms hungry for innovation are joining through new forms of cross-sector partnerships.

## **Harvard Business School (HBS)**

The Global Initiative has grown and thrives. It includes efforts such as the Global Database on International Business and Global Research and Education Centers. The growth in demand for management education in new and emerging as well as existing markets has prompted HBS to establish classroom facilities in China, India and Europe, supporting a small portion of programs and other HBS activities. Research initiatives in healthcare management and the sciences, as well as in social enterprise, leadership and entrepreneurship continue to grow and deliver significant new knowledge for those involved. January Immersion Experiences supplement on-campus education by providing practical “immersion” in academic, cultural, and corporate- or organization-based fieldwork around the world.

Blended learning and lifelong learning communities have created strong networks connecting faculty and practitioners. MBA programs are hands-on and especially in the EC year, experimental, with a growing number of students cross-registering into the MBA program to “build their own” joint degree programs, notably in engineering and life sciences; new dual degree programs have been created for business/real estate, business/urban planning, business/education and business/public health. The doctoral programs have intensified efforts to increase the number of scholars who are prepared to join the faculty. Through all of these programs, the alumni remain active and even more involved in HBS teaching and learning.

At HBS, faculty remains focused on teaching and research. Case-based teaching remains the defining characteristic of HBS, enriched through the use of new information technology and social software. The impact of faculty’s research is measured increasingly in ways that reflect the collaborative and dynamic digital nature of knowledge creation and dissemination evident in the sciences. eResearch, particularly in interdisciplinary and global work, is the preferred mode for many of the younger faculty members.

New types of students have entered our doors, in part due to the HBS 2+2 Program and a new fellowship program. The MBA class of 2011 includes more students who have work experience in world-class, knowledge-based science and engineering organizations, and are accustomed to employing a full spectrum of cutting-edge IT technologies. They prefer to work collaboratively and expect information to be easily accessible. HBS has responded to student’s changing expectations by offering Web-based tools, video cases, simulations and virtual communities in the classroom. This working environment seems to be preferred by young faculty and doctoral students as well. Executive Education participants have varying comfort levels with new learning technologies; new programs adopt similar technologies and approaches popular in the MBA.

## **Knowledge and Library Services (KLS)**

KLS is a team of experts passionate about its mission, collaborative, innovative, service-oriented and accountable to its customers, partners, and team members. It is committed to the School’s values and to the importance of lifelong learning. Success requires spanning disciplines, risk taking, flexibility, innovation, and transparency. Success also requires reflection, evaluation, critical thinking, and knowledge sharing, as well as meeting expectations through planning, program and project management. KLS team members recognize the value of partnering with each other and with other organizations in the design, development and delivery of products and services. KLS is a meritocracy where collaboration,

knowledge sharing, team work, idea exploration and delivering on commitments are recognized and rewarded. Within the realities of the economic environment and given the dynamic nature of the information industry, KLS tests what is core and non-core to its customers, and adjusts its products and services accordingly. Customers working around the globe benefit from services available virtually 24 X7, and from staff, as appropriate. KLS' powerful combination of process, technology, information and expertise ensures that the integration of our work continues to deliver the support needed for world-class teaching and research.

Through its own work and the advisory role it provides to others, KLS supports the full cycle of knowledge creation, information management, presentation and information and knowledge use. True to its mission, KLS' impact is best reflected in the ease with which multiple types and disparate sets of unique information, ideas and expertise are used to support HBS' research and educational objectives. It is this uniqueness and multi-disciplinary expertise that puts HBS at an information advantage over others.

KLS leads its peer organizations in innovations in Scholarly Communications, knowledge asset management, Web and Intranet design and development, and the application of deep subject and information expertise in support of global business research and education. KLS champions new collaborative approaches to research and knowledge sharing; it has created its first multidisciplinary Knowledge Commons and a prediction market that aggregates knowledge of information professionals about future trends in the information industry. It has completed the 2009 initiative to build a 2.0 version of the Intranet and the Web for HBS. KLS continues to experiment with new methods of knowledge sharing, such as creating targeted, web-delivered, content "databases," expressly designed for user exploration and research, including end-user tools for linguistic analyses. Successful examples include the ongoing Institutional Memory program and next-generation Working Knowledge products.

KLS' customers (faculty, students, alums, staff and business practitioners) recognize our high standards of quality and expertise in designing the user experience, supporting the development of courses and curricula, supporting the creation of new knowledge through research, and in developing, managing, and disseminating authoritative information and data products in a world marked by a deluge of digital content. KLS products and services span research and course support, knowledge and information access, information management, Web development and knowledge sharing.

Since 2008, KLS has developed advanced capabilities in data and digital content management, program management, web "interaction design," and information retrieval and visualization. Our capabilities in product management and information research are now mature. In terms of data management, KLS professionals include experts in knowledge asset management, data preservation and curation, text mining and other forms of large data set analyses. KLS has partnered with DRFD to create a global, collaborative network of information, archives and data sets on international business. KLS chairs the governance of information and knowledge asset management at HBS.

Strong project and program management skills as well as deep subject expertise and knowledge of the audience requirements ensures the integration of our expertise into the primary processes of HBS, including course development, research, learning and administration. KLS programmatically supports the enhancement, revision and development of new courses and educational programs. Under the program



leadership of KLS, the Web and Intranet now deliver a world-class experience aligned with key HBS processes, giving staff, students, and faculty a competitive advantage. The Web and Intranet team recently won awards for their world-class user experience.

The KLS Web development experts now have very strong interaction design and information retrieval/visualization expertise. Personalization prevails. Our customers have now full access to HBS Web and Intranet resources on mobile devices; they can easily interact with and search across HBS applications and Web properties, including locating and using knowledge assets available anywhere.

KLS is well-positioned to continue to lead in knowledge and information services for the next decade, having taken an approach to innovation based on rigor and discipline, focused on the customer and the HBS priorities.

## **Knowledge and Library Services – Distinctive Capabilities#**

### **Information Research**

Expertise on how to access, analyze and present findings based on published, licensed, or publically available information. See KLS Information Research Standards for additional information about of standards of service.

### **Knowledge Sharing and Information Management**

Expertise in enabling the sharing of what people know, and in capturing, organizing, managing, packaging, preserving, presenting and disseminating content (historical, archival, institutional, published) both physically (e.g., Knowledge and Library Services) and virtually.

### **Information Product Design and Management**

Expertise in understanding user behavior and implementing an information environment that best meets the requirements (e.g., portals, personal workspaces, web sites).

### **Information Architecture**

Expertise in structuring information so that the right information is available at the right time and place (e.g., search, taxonomy, navigation, thesauri, topic maps).

## Knowledge and Library Service – Strategy Reflection 2012 for FY13 – FY15

### MISSION

We advance HBS's mission by providing distinctive information services, resources and expertise so that our community excels.

### VISION

Within the next 3 years, KLS will build on our unique collections, individual capabilities, digital tools and information management best practices that are integral to the School's intellectual ambition.

### PRIORITIES

- Create an adaptable organization that empowers us to succeed in achieving our priorities.
- Create a collaborative culture that fosters trust, recognizes performance, values innovation and enhances our capabilities.
- Strengthen our unique collections in: geographic regions of strategic importance to HBS, HBS-created data and contemporary business records.
- Establish best-practice services for managing information to ensure that content created at and collected by HBS can be retained, found, reused and promoted.
- Continue to innovate and improve on our ongoing work.
- Promote a better understanding of who we are, what we do and the value we add to the HBS community.
- Influence the strategy and implementation of the new Harvard Library.