To: **John Wilkin, University Librarian**
              Executive Committee
From: **Lisa Janicke Hinchliffe**
Re: **Innovation Funding Proposal**
Date: **December 23, 2014**

Attached is a proposal for an Innovation Fund award to plan and pilot the establishment of a University Library Occasional Reports Series. I look forward to receiving your feedback. Please let me know if you have questions or requests for additional information.

INNOVATION FUND PROPOSAL

Proposed Project: University Library Occasional Reports Series
Proposed by: Lisa Janicke Hinchliffe
Date: December 23, 2014
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1. **The Project Idea**

This Innovation Fund proposal seeks to establish the University Library Occasional Reports Series as an ongoing publication of the University Library.

Faculty and staff of the University Library conduct a wide-ranging program of research and development as part of their responsibilities in carrying out the management and operations of the Library. While some of this work is published in the professional and scholarly literature, much of it is not and is only inconsistently recorded in committee and task force minutes. This work is thus hidden both from others in the Library who might find it useful but also from the profession at large, meaning that other libraries do not benefit as they might from our work and the University Library does not have as prominent a profile in this area as it should.

Though individual faculty do publish some of the research that is conducted, it is often cast as general findings, recommendations, etc., as is appropriate to the scholarly literature. Scholarly articles typically do not present the findings within an organizational context and do not document the specific programs or practices we adopt or the decisions we make about how to actually manage a library over time. So, for example, though Bill Mischo and others have published studies of transaction log analysis, the Library's reports on how we have assessed discovery systems over time (e.g., WebFeat and Primo) relative to our operational needs have not been. Likewise, I co-authored a study on student perceptions of video tutorials with Merinda Hensley and Melissa Bowles-Terry; however, there is no easily available report of how we re-thought our online instruction strategy as a result.

It is the application of our research that would be so inspiring to other libraries and is the kind of thing for which some academic and research libraries have become known. In my files for the Discovery and Delivery Study Team, for example, I have reports from the University of Minnesota, North Carolina State University, University of Michigan, Harvard University, and the University of California at Los Angeles. These research-in-action reports are very helpful in managing a library and understanding decision-making influences and processes.

As a Library, we already have many internal documents that could easily be put into an Occasional Reports Series template. The design of such a template and editorial practices would be intentionally lightweight in order to minimize the effort required in order to maximize the output of the series. In addition, IDEALS is available to serve as a repository for the documents, requiring therefore minimal effort to "publish" the series and providing metrics for assessing the impact of the reports. The publish.illinois.edu WordPress platform supported by CITES would be a lightweight and straight-forward way to publicize each report.

As principal investigator on the project, I would draw upon my experiences in project management as well as my service as editor of a scholarly journal and two professional society newsletters as well as on numerous editorial boards in order ensure the success of the project.

Finally, as a side benefit, publishing an Occasional Reports Series would be consistent with campus approaches. Many campus units and centers publish occasional papers or technical reports. Having such a series would help make visible to the campus the kind of research and development work that the Library does and how it contributes to the professional community of practice.

2. Objectives

In light of the description provided above, this project has three objectives:

1. To document the research and development work carried out by the University Library.
2. To make such reports discoverable by others in the University Library and the profession at large.
3. To raise the profile of the University Library as key contributor to research and development in academic and research libraries.

3. How It Fits With Existing Activities in the Library

The proposed University Library Occasional Reports Series amplifies the impact of existing research and development work in the Library. The templates that will be developed for the series also have the potential effect of streamlining report writing by providing a general framework and editorial guidelines that can be used to improve effectiveness in presenting information and efficiency in document production.

4. Resources Needed

Graduate Hourly Assistance - 100 Hours at $20.62/hour = $2062

The graduate hourly assistant will be responsible for assisting with reviewing how other libraries publish their reports (starting with the list of libraries that have reported to the Library Publishing Coalition that they publish technical reports series), gathering input from library faculty and staff about how they would like the Occasional Reports Series scoped and what templates, guidelines, and production processes would be most helpful, and creating sample reports from existing committee and task force documents.

The proposed number of hours is based on past experience managing graduate hourly and practicum project work that included similar tasks as well as my experience editing a scholarly journal and overseeing newsletters for the ACRL Instruction Section and IFLA Information Literacy Section.

5. Sustainability

The Reports Series will only be sustainable with continued allocation of resources to the production of the publications. The work funded through the Innovation Fund proposal is intended to provide the up-front investment in establishing templates, practices, and procedures. Much of the production work long-term will be de-centralized in that it would be carried out by a committee, task force, team, etc. as a component of doing its work; however, a central editor will be needed to ensure ongoing coordination and adjustments of workflow as needed over time.

Long-term, I believe Library Advancement may be able to find donors who would be interested in supporting this endeavor as many campus units have donor support for research dissemination. In addition, I could imagine pursuing partnerships with the scholarly publishing/communications courses in GSLIS and perhaps courses in journalism, technical writing, etc. in order to engage graduate and undergraduate students in producing the series – either as credit-bearing internships/practica or in donor-funded positions. These possibilities would be investigated as part of the Innovation Fund proposed project.

6. Timeline

February 2015:	Innovation Fund Award Received
March 2015:	Review of detailed project plan and activities with advisors for the project – Beth Sandore Namachchivaya (Associate University Library for Research and Technology), Atoma Batoma (Chair, Library Research and Publication Committee), and Dan Tracy (Visiting Librarian for Library and Information Science and Research Support Services) have all agreed to provide advice during the course of this project. In addition, I plan to ask for input from the Research and Publication Committee as well as the Strategic Communications and Marketing Committee.
March-April 2015:	Hire graduate hourly assistant.
April-May 2015:	Review how other libraries publish their reports, identify IDEALS options for publishing (e.g., as a "community" or under some other structure), and establish the publish.illinois.edu WordPress site.
April-June 2015:	Gather input from library faculty and staff about how they would like the Occasional Reports Series scoped and what templates, guidelines, and production processes would be most helpful.
July-August 2015:	Create sample reports from existing committee and task force documents, deposit in IDEALS, and publicize via WordPress site.
July-October 2015:	Monitor downloads from IDEALS and other metrics for use and impact.
September-October 2015:	Explore possible partnerships with GSLIS, journalism, and technical writing, etc. courses.
November 2015:	Draft report and recommendations.
December 2015:	Submit report and recommendations to the University Librarian and Executive Committee.

7. How to Measure Benefits of the Project

Measuring the benefits of the proposed project would be done relative to the objectives of the project.

Objective	Measures
1. To document the research and development work carried out by the University Library.	This objective is an output objective. Metrics used to assess the benefits could include the number of reports published and the response rate from committees, tasks forces, units, etc. when invited to submit.
2. To make such reports discoverable by others in the University Library and the profession at large.	This objective is an output objective. Metrics used to assess the benefits could include an assessment of report adherence to editorial guidelines, degree of full record details in IDEALS, and number of subscribers to the publish.illinois.edu WordPress site for the reports series.
3. To raise the profile of the University Library as key contributor to research and development in academic and research libraries.	This objective is an impact objective. An indirect measure of the benefit would be the number of downloads for each report from IDEALS. Tracking mentions of each report, citations, etc., would provide further evidence. Such data would have to be collected manually until such time that the Library or campus might invest in a tool such as Plum Analytics or Impact Story for the organization.

8. How to Determine Whether the Project Has Succeeded or Failed

The success of the project should be determined based on the evidence gathered relative to the benefits of the project as assessed against its objectives considered in relation to the relative investment required and ongoing sustainability costs.