

# **Refocusing Distinctive Capabilities: Strategic Shifts in Baker Library Services**

**“Doing More with Less”**

**The 8<sup>th</sup> Annual Columbia University Libraries Reference Services Symposium**

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### **Abstract**

This paper outlines how Baker Library Services, a department of Harvard Business School's Knowledge and Library Services, has refocused its distinctive capabilities in order to become more integrated with research and course development and increase the value its human and material resources contribute to research, teaching, and learning. As part of a multi-pronged strategy, this work has developed new individual and organizational capabilities, including a: Research Support Continuum, Research Services Delivery Model, Project Management Office, and service to support the development of Collaborative Research and Course Development Environment. The work is positioned as a journey with reference to an earlier report on the creation of a Curriculum Services Group, update on current initiatives, and outline of future plans for continuing priorities to achieve the group's strategic shifts.

*Keywords:* strategic alignment, capability development, research support, academic information services, library and faculty collaboration

## **Refocusing Distinctive Capabilities: Strategic Shifts in Baker Library Services**

### **Introduction**

At this symposium in 2007, we presented a first look at a new service from Baker Library that proactively engaged with faculty to integrate resources and information-rich learning opportunities, working in collaboration with them throughout the design, development, and implementation of Masters of Business Administration (MBA) and Executive Education courses. Our paper, *Shifting Gears*, provided a case study of the development of the Curriculum Services Group – a dedicated group of business librarians who were moved out of the reference environment and tasked with integrating information and information research skill development into courses and curriculum-related learning activities. Three years later, the world is very different.

The 2008 economic crisis has had, as in many of our institutions, an impact on our approach to providing services. This year's symposium theme, "Doing More with Less," is a sobering reminder that it's not "business as usual" in our institutions. However, we argue that we're neither "doing more with less" or even "less with less." Rather, we've taken the opportunity to fine tune our original transition strategy and rethink how we position our distinctive capabilities, leverage human and material resources, set priorities, and become even more closely align with our School's mission by creating value for our faculty, students, and community.

Worth a paper on its own, Knowledge and Library Services' vision is articulated by a comprehensive description of a future state. The result of a multi-year, collaborative strategic planning process (in which our entire staff participated), the future state narrative outlines where we're going based on the changes we expect to see within the information environment and our school and what KLS will look like in order to meet these changing needs (see Appendix A). The future state is our "beacon" – our stretch point – that keeps us focused on where we're going.

Achieving this vision relies on six primary strategic shifts:

- Integrate with research and course development
- Organize the School's priority information
- Develop an enterprise Web service

- Move to electronic products and services
- Support global research and education
- Increase the reach of faculty knowledge dissemination.

Used to track our progress with the Dean's office and our partners, we plot key accomplishments as strategic shifts in a chart form (see Appendix B) that clearly shows our transition from Baker Library to Knowledge and Library Services (KLS) at the Harvard Business School (HBS), a journey we started in the fall of 2004.

In addition to our Future State, we have three enduring goals – goals that have guided our transition from the very beginning. They're worth mentioning to help set the context for how we've refocused our services in BLS because they help us prioritize our efforts and keep us focused on our customers:

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.

In this paper, we'll highlight one of our strategic-shift streams and outline how we've refocused our distinctive capabilities in Baker Library Services in order to become more integrated with research and course development. This transition is part of a long-term process, a journey that started in 1927 with the birth of HBS and continues today as we seek to constantly refresh our view, align our capabilities, and find new ways to leverage our distinctive capabilities in order to meet our users' needs.

### **Baker Library Services – Then and Now**

Baker Library Services (BLS) was formed in 2005, a combination of the outward-facing service delivery points related to the contemporary collections. BLS was responsible for oversight of the physical and virtual spaces as well as 3 functional groups: research services, reference services, and access services. The staff included approximately 15 professionals (e.g., librarians,

statisticians, economists, and MBAs), 10 paraprofessionals, and a rotation of casual staff to supplement library operations.

Today, as part of the 2009 staff reduction and refocusing, we are a 20-FTE unit with approximately 17 professional staff and 3 paraprofessional staff (see Appendix C). Our areas of responsibility are the same as they were in 2005 with the exception that primary responsibility for the Baker Library | Bloomberg Center website now resides with Information Products, a relatively new KLS department.

Within this reduced headcount, we've repositioned our services to achieve our overarching goal:

*Leverage our distinctive capabilities through strategic shifts aligned with HBS priorities in order to institutionalize the integration of research and course development, creating greater value for our faculty, students, and community.*

Our strategy has been enabled by the development of 4 new individual and organizational capabilities:

1. **Research Support Continuum** – a shift in focus from reference to research enabled by the provision of self-service tools.
2. **Service Delivery Model** – staff and procedural shifts emphasizing research instead of reference.
3. **Project Management Office** – new individual and organizational capabilities to support proactive, project-driven work.
4. **Collaborative Research and Course Development Environment** – introduction of new technology to enable research and course development via a Microsoft SharePoint platform.

Let's look at each one in more detail.

### **Research Support Continuum**

Analysis of customer research behavior data from our reference question tracking system identified a significant shift in the types of questions that were being asked across our communication channels (i.e., through web forms & email, in person, and via phone) and an

increase in both the time to engage with the user and the level of expertise required to satisfy the query. To help us refine our service offering, inform our staffing approach, and identify our professional development needs, we developed the Research Support Continuum (see Appendix D).

The continuum defines progressive levels of assistance performed by a range of service staff. It enables more effective targeting of products and services to meet customer needs and to provide a greater understanding of customer behavior. We identified 5 tiers of service from self service (low touch) to knowledge creation (high touch). The tiers are based on the assumption that the largest number of customers served occurs at Tier 0—Self Service, which is also the “lowest-touch” tier characterized by the lowest level of personal contact and direct service effort. The higher tiers target fewer customers, but provide increasingly higher levels of service and usually require a larger investment in time interacting with the customers from staff who provide the service.

**Tier 0 – Self Service** occurs when BLS provides assistance primarily via our web site, but the transaction is not mediated by a staff member. Self-service tools have been targeted to assist users in identifying appropriate information resources such as research guides, frequently asked questions, and knowledge centers. While considered “low touch” because of the lack of staff mediation, the development of these tools is, in fact, quite labor intensive. The Information Resources and Contemporary Collections group (IRCC) is responsible for developing the self-service tools with input from subject matter experts across BLS and in partnership with KLS’s Information Products group.

For **Tier 1 – Ready Reference**, staff members provide assistance to straight-forward directional and reference questions, such as citation verification, use of primary catalogs and databases, and the location of specific materials or collections such as corporate reports. All BLS staff members (i.e., paraprofessional and professional) provide Tier 1 service.

**Tier 2 – In-depth Reference** includes reference interactions that require a higher degree of resource and/or subject expertise. At Tier 2 we distinguish staffing levels required to provide the

service. While all research support specialists function in this role, questions may be referred to specific subject matter experts or process owners.

**Tier 3 – Consultation** represents the move from reference to research support. All consultations are provided by appointment and involve advance preparation on the part of the Information Research Support Specialist. A wide range of queries fall into this tier, and depending on the client, span the reference – research divide. In the case of MBA and doctoral students, research is not completed on their behalf. For faculty, faculty proxies, alumni, and HBS administrators, research results, including analysis and findings, are completed.

**Tier 4 – Knowledge Creation** is the highest level of research support and includes our fee-based service available only to HBS faculty. It occurs when researchers provide contract deliverables, including: consulting on research methodologies; database creation, clean-up, and merging; fact-checking; teaching preparation; exhibit development; and co-authoring of papers. Baker Research Services (BRS) takes the lead on providing this service tier.

We've observed that customer use of higher tiered services, across all communication channels, has increased as more information is digitized and as web technology and our self-service tools have improved and increased in number. As well, staffing our public service points with professionals versus paraprofessionals has decreased the number of "dead-ended" ready reference and directional questions and increased our ability to add value, moving a Tier 1 query to a Tier 2 and sometimes Tier 3 level. Therefore, investment in the development of effective self-service tools results in a higher level of difficulty of questions being asked at higher level tiers. This phenomenon is significant because it suggests that staff servicing the Information Services Desk require higher level skills and has informed our Service Delivery Model, which we discuss in the next section.

The Research Support Continuum language provides a clear message to our users that BLS adds value beyond its traditional reference role. As partners in supporting research, both the continuum and the Research Services Delivery Model are key components of the information

ecosystem designed to meet customers' needs seamlessly and enhance our role as the trusted advisor for knowledge, information, and learning practices (as per our enduring goals).

### **Research Services Delivery Model**

Multiple factors converged in BLS that caused us to rethink how we were providing service and to subsequently revise our service model. In addition to the Research Support Continuum discussed in the previous section, our engagement in curriculum and course support (the focus of our 2007 symposium paper) increased from 3 pilot projects in 2007 to 78 projects at the end of the 2009 academic year. This increased involvement generated more use of the library's research services by students (e.g., MBA, Doctoral, and Executive Education) due to the integration of information resources and information research intensive assignments.

Student queries were at a higher tier on the Research Support Continuum and required deeper knowledge of resources and course content, especially the learning objectives related to the assignments. Reference services statistics also showed an increase in higher tiered questions in general. We believe that this increase is related to the fact that lower tiered questions are often answered by self-service tools (Tier 0) as seen from our web analytics. Thus, customers who can't find the answer to queries using Tier 0 move up the continuum using higher tiered services. Finally, the economic downturn prompted a Harvard University-wide reduction in full time employees. Directly affected by this mandate, Baker Library Services eliminated several positions. Based on our use statistics and aligned with our enduring goals, we decided to reduce the number of paraprofessional positions that supported customers at the lower end of the Research Support Continuum.

These factors led to the reconfiguration of our Service Delivery Model (see Appendix E). Informed by the recent changes in our statistics and prior analysis related to the Research Support Continuum, we knew that we needed a service delivery model that would leverage our distinctive capabilities through the individual knowledge and skills of our staff. Additionally, increased engagement in course development required a change in organizational infrastructure that supported the management of multiple simultaneous projects. The reorganization included merging the curriculum and research support services specialists into one group, Curriculum and



Information Research Support (CIRS). To reflect and support the changing transactional service levels, the focus of Access Services staff shifted to Baker Library Operations (BL Ops).

This realignment has led to improved communication of project status and service needs. Simultaneously, the new structure increased our flexibility to allocate our staff resources more efficiently and to leverage subject matter expertise across projects and services. Staffing at the services desk now includes two information research support specialists at the busiest times of the day with Baker Library Operations staff on call. In this way, we've proactively positioned research librarians, who were formerly "on call," directly at the point of service. Since the realignment, our statistics continue to show an increase in higher tiered questions being asked from our customers and an increase in our ability to move a Tier 1 question to a Tier 2 and often Tier 3 service, once again showing how we add value to research, teaching, and learning activities at HBS.

### **Project Management**

A third factor contributing to the strategic shift in Baker Library Services is the creation of our Project Management Office (PMO). This office is responsible for managing our growing number of internal and customer-facing projects, developing tools and procedures to facilitate effective project management, collecting statistics on our project work, and implementing a consistent approach to acquiring projects and efficiently shepherding them to successful completion.

Soon after establishing the PMO, training was provided for staff to learn basic project management skills, outline methodologies for clearly defining projects and assigning responsibilities, and develop consistent terminology, templates, and approaches department-wide.

A toolkit was developed to support project work, including a Work Process Design Flow (see Appendix F). This diagram maps how all projects are funneled through an Opportunity Clearinghouse and considered for acceptance. If a project meets our strategic objectives and aligns with our areas of responsibility, it's assigned to a project manager who then facilitates the process from launch to completion. A Project Charter Template also is part of the toolkit. The charter ensures that a project is properly scoped with deliverables, team member roles and

responsibilities, and timeframes for completion. Once possible projects are identified, they are logged in our Project Pipeline that tracks the project's life cycle from opportunity to launch to completion. Having all project information consolidated in one place facilitates the successful completion of a project and identifies synergies across projects, which impacts our effectiveness.

With the creation of the PMO came a cross-department system for time tracking. Each staff member is required to keep track of his or her work each week, tracking time spent by categories that include customer service (e.g., quick reference, in-depth research assistance, and consultations); administrative time (e.g., meetings, reading email, and other types of communications); and professional development activities (e.g., formal and informal learning and liaison with a specific customer group or faculty unit).

A separate category of time tracking is for project work. Each project is tracked as a subcategory. Having staff keep track of the time they spend on various kinds of project work provides a more accurate picture of the work done by the organization and informs subsequent resource allocation. Tracking each project provides us with the ability to see not only how many people are working on the same project, but how much time each project requires. At project completion, it's possible to provide concrete data when considering the ramifications of accepting a similar project in the future. Specifications of future projects can be adjusted accordingly. This system provides a consistent way for human resources to be tracked and allocated for subsequent projects and informs our Service Delivery Model.

Another aspect of the PMO is weekly our Stand-Up Project Meetings. The meetings are attended by all staff engaged in or support project work, including the department manager and Director of the PMO. They are structured similar to an Agile development approach to a daily "quick check-in" where no one sits down, but remains standing to emphasize the need for focused, concise information exchange. Staff provide updates on projects, highlighting issues and opportunities related to the work. These meetings allow time for staff to be updated on each other's work and be alerted to any synergies that could be created from multiple staff working on the same project or leveraging work done for one project for another project. The meetings also allow the opportunity for the department's manager to provide tips on overcoming hurdles and

recommending enhancements to projects and opportunities for new projects. The ultimate goal is to have individual staff update the Project Pipeline as they progress, recording a project's status from active to complete then archiving details to be used for new projects – a function that will be managed in the BLS ShareSite, which is currently under development.

The implementation of a PMO has resulted in several benefits. It provides a streamlined approach to considering the viability of projects. The reality is that we just don't have the resources to complete all projects. Therefore, we need a process to assess the opportunity, prioritize it against the School's and KLS's objectives, and then set up the project for success. A focus on resource allocation ensures that individual staff's project workloads are easily identified and we effectively manage the ebb and flow of our cyclical workflow, based on the academic year and faculty research behavior. The toolkit ensures a consistent approach to methods across projects. As individuals lead projects, they develop capabilities transferable to future projects. Project work is leveraged across multiple projects increasing productivity and responsiveness to customer needs. Having a view of project life cycles allows staff to be proactive in generating new project work. Overall, the PMO keeps the work of individuals connected to the overall work of the organization and enables more efficient delivery of customer products and service.

### **Collaborative Research and Course Development Environment**

HBS's Information Technology Group (ITG) implemented the Microsoft SharePoint environment in early fall 2009. In addition to setting HBS-wide information management standards for this new application, KLS took the lead on positioning this new technology with faculty as a collaborative research and course development environment. With a cross-functional team of KLS staff, our IRCC manager established 10 pilot projects with the goal of identifying models of cost-effective, easy-to-use collaborative research spaces. Given the unique characteristics of faculty research, we anticipated that faculty would need guidance in the design, build, and ongoing support of these sites. As such, this opportunity enables KLS to:

- Establish a boutique service that adds value to faculty research
- Embed KLS products, services and expertise into the research process
- Integrate information management principles and practices into ShareSites

- Identify research use models and create templates and guidelines for easy replication by other faculty
- Identify opportunities to engage other KLS projects and services to meet faculty needs while strengthening faculty relationships
- Build ShareSite expertise in KLS staff for use in our own projects and information delivery sites.

At the point of writing, we're close to completing our pilot project phase with an evaluation of user satisfaction. After an analysis of that data, we will complete the project deliverables of:

- Standards for research collaboration sites, including life cycle management and analytics guidelines for site owners
- Definitions of and templates for standard collaborative research model types to be used as a basis for creating new research collaboration spaces
- Training and guidance for IT help desk staff to support faculty requests for research ShareSites
- Gap analysis of ShareSite functionality and faculty research needs
- Standard KLS tools/resources web part to meet research needs
- Communication plan for expanded faculty outreach.

While each of the 10 pilot projects has provided us an opportunity to learn how we can more effectively support faculty research collaborations, one project in particular yielded a proverbial “mother load” in that it encompasses multiple initiatives and audiences – all of which are spawned by one faculty research program.

A research collaboration between two HBS faculty who were swamped with email exchanges of documents was identified. Upon further discussion with the faculty, we found that creating a central site on the research program topic could then feed multiple subsites in support of related teaching, writing, and outreach activities. The collaboration included not only multiple HBS community members, but partners in other academic institutions and private/public sector firms. Fourteen related initiatives across 7 audiences were identified. But for the pilot project, we decided to focus on 3 components, building

interconnected spaces for: the overarching research program (i.e., sustainable urbanization); a private space for creating a case about a sustainable city development firm; and, a course support space for one of the faculty member's doctoral seminar (see Appendix G).

This multiple-streamed project is providing us with an extremely rich test environment that is, as we're learning, fairly typical of how faculty are starting to engage in digital scholarship. The opportunities to integrate KLS products and services that utilize all of our distinctive capabilities and further all 3 of our enduring goals has been extremely energizing – both challenging and rewarding in that learning curve on ShareSite functionality is relatively steep but our distinctive capabilities are well positioned to add a great deal of value to this collaborative research environment.

## **Conclusion**

We noted in the Introduction to this paper that our strategic shifts are part of a journey. As next steps in this journey, BLS plans to:

1. Continue to develop our individual and organizational capabilities in research support, us of information in course development, project management, subject matter expertise, collaboration research environments, and digital scholarship.
2. Build out a research and course development toolkit: self-service tools, project templates, resource allocation methods, statistics gathering and reporting, assessment/evaluation feedback and analysis loops.
3. Expand targeted marketing and outreach to faculty.
4. Develop a broader knowledge-sharing community on course development and digital scholarship.
5. And last, but definitely not least given a change that will certainly impact our direction: Position our products and services in alignment with our new Dean's priorities.

As stewards of this particular part of our journey, Baker Library Services and our other Knowledge and Library Services colleagues, are constantly challenged to rethink, refocus, and renew. Along with the stereotypical comfortable shoes, any notion of "business as usual" has to be discarded and our energies need to be channeled into a cycle of continuous improvement through building new individual and organizational capabilities that enable us to add value to our customers.

## References

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## Appendix A: KLS Future State



### KLS FUTURE STATE 2011

#### External Information Environment

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. Strategic partnerships with ITG and with Marketing and Communications have delivered significant value to HBS. 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. The 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. Along with its strategic partners, KLS 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, and in partnership with ITG and M&C, the Web and Intranet now deliver a world-class experience aligned with key HBS processes, giving staff, students, and faculty a competitive advantage. HBS recently won awards for the world-class user experience.

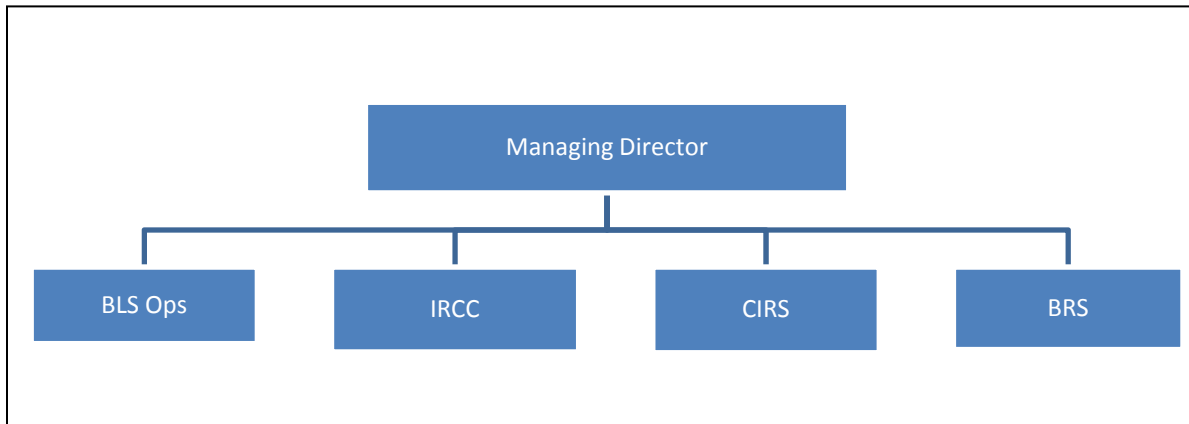
The KLS Web development experts now have very strong interaction design and information retrieval/visualization expertise. Personalization prevails. Our customers have now full access to HBS Web and Intranet resources on mobile devices; they can easily interact with and search across HBS applications 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, strategic partnerships, focused on the customer and the HBS priorities.

**Appendix B: KLS Strategic Shifts**

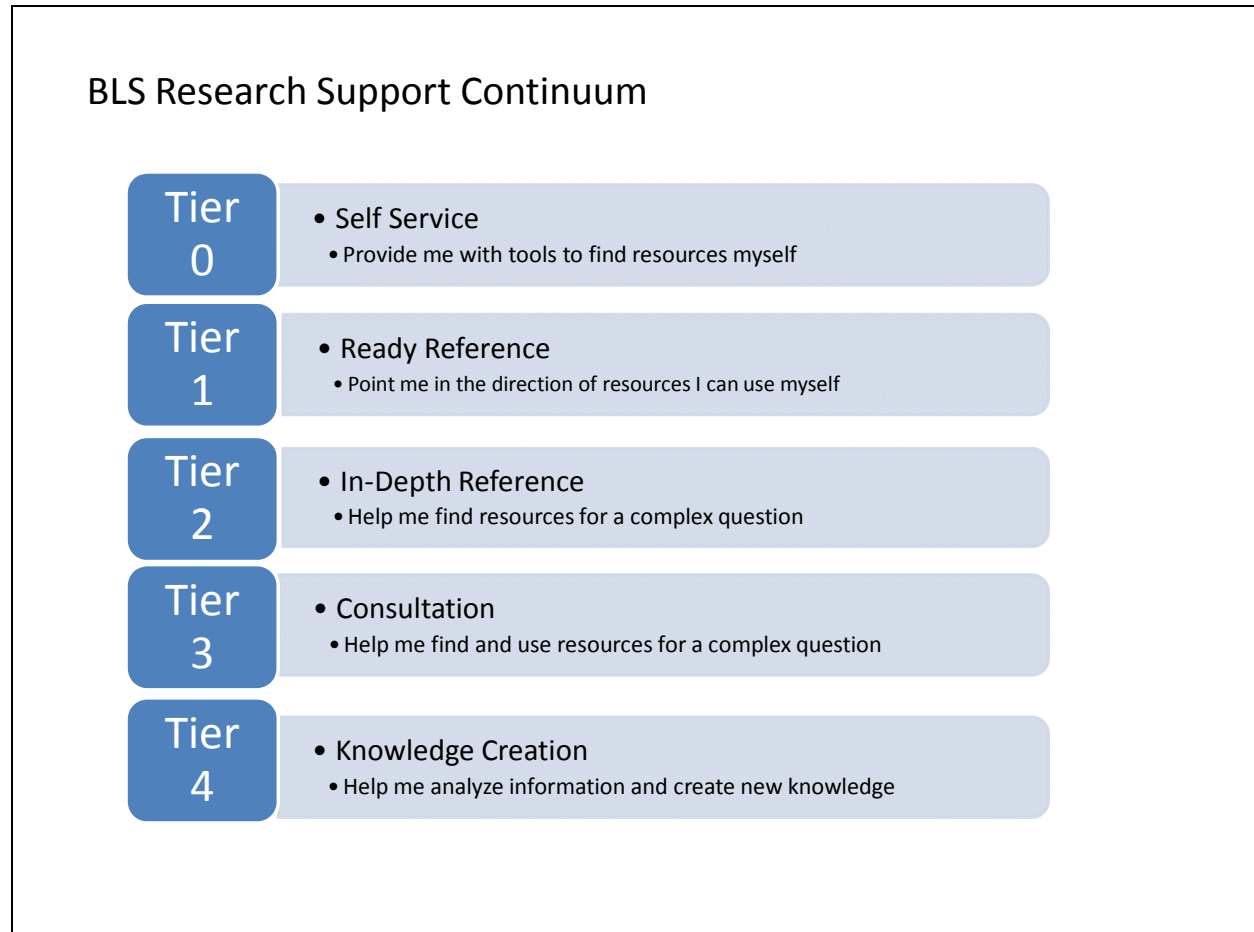
Strategic Shifts	FY07	FY08	FY09	FY10 Targets
Integrate with Research and Course Development	3 pilot MBA projects	34 projects Model developed	Develop - 9 Revise - 9 Enhance - 60	10% Growth Focus MBA and Exec Ed
Organize the School's priority information	Catalog books Socialize information management	Catalog electronic information: Institutional Memory (IM) Information Lifecycle Management Program	IM and Centennial Assets Scholarly Asset Standards for SharePoint (Intranet)	Scholarly Assets Information management standards and governance Expert resource
Develop an enterprise Web service	Ad hoc – mainly work for KLS	iTRAC 89 projects	74 + projects Intranet Program Office	Transferred to ITG
Move to electronic products and services	Status Quo 2.5X \$ electronic vs. print	First Knowledge Center – BBOP HC web properties 2.9X \$ electronic vs. print	Institutional Memory Agribusiness KC OPM eBaker 2.9X \$ electronic vs. print*	Deliver our products in SharePoint 2.3X \$ electronic vs. print*
Support Global Research and Education	No Focus	European universities Research Centers Global content (China, India)	Chinese Universities Harvard collaborations Launch GKEN – 40 269 global research reqs	GKEN + China , Europe, India China Knowledge Center
Increase reach of faculty knowledge dissemination	<i>Working Knowledge (WK)</i> website and newsletter	<i>WK</i> for Exec Ed, Publishing, news media <i>WK</i> moved to daily content	<i>Economic Crisis</i> site <i>WK</i> for School's Initiatives Align with HBS Marketing Scholarly Communications Task Force	Strategy for knowledge dissemination <i>WK</i> stakeholder analysis "Platform" management Healthcare collaboration Scholarly Communications

**Appendix C: Baker Library Services Organizational Chart**

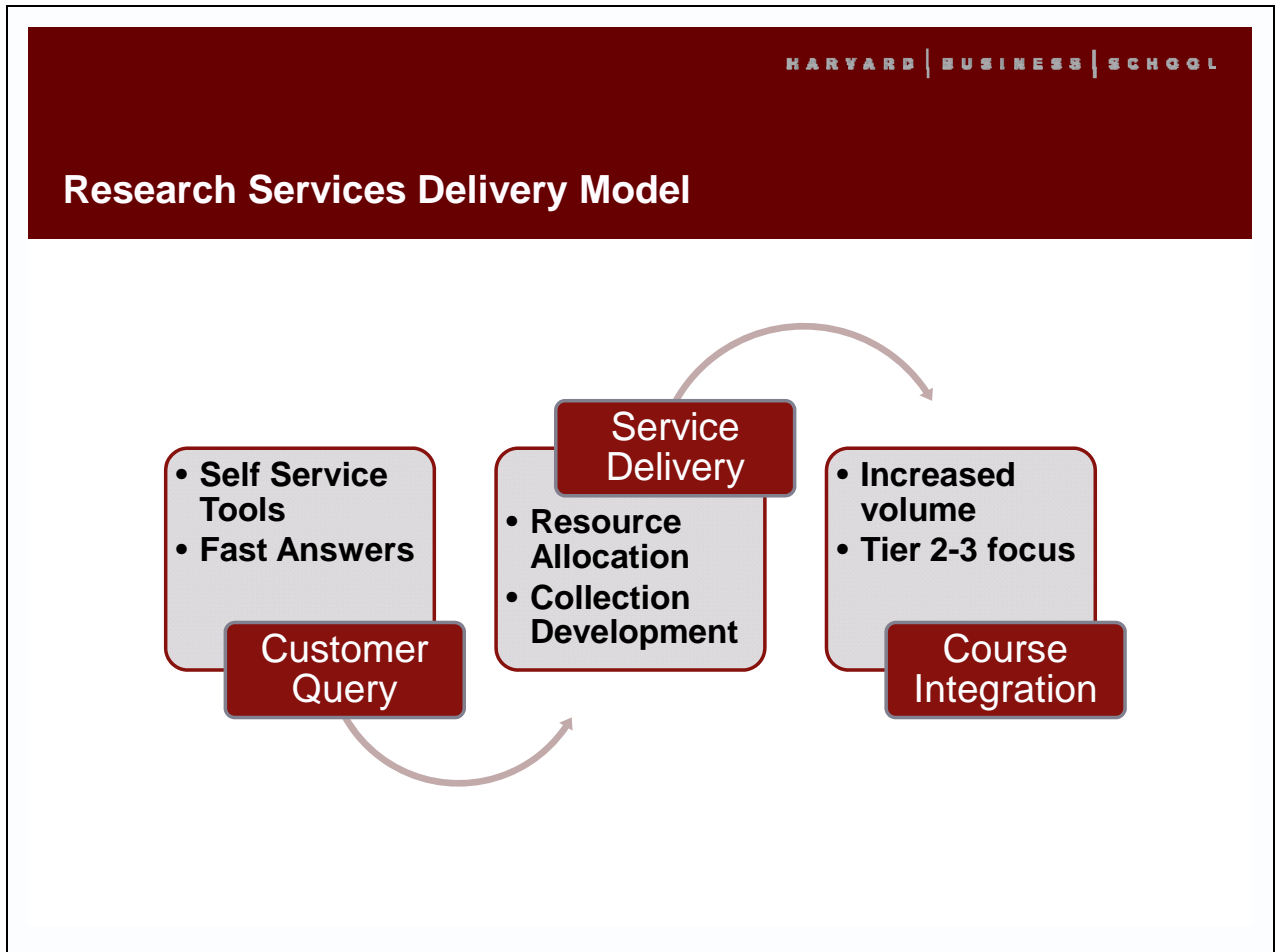


<b>Baker Library Services Operations (BLS Ops)</b>	<b>Information Resources &amp; Contemporary Collections (IRCC)</b>	<b>Curriculum &amp; Information Research Services: (CIRS)</b>	<b>Baker Research Services (BRS)</b>
Assistant Director .25 Process manager 3 Access services specialists	Assistant Director	3 Curriculum specialists  3.25 Information research specialists	Assistant Director  5 Business information specialists  2 Business information analysts
Manages BLS infrastructure and library service operations to leverage our expertise and contemporary collections in support of teaching, research, and learning.	Ensures that the contemporary collection is relevant and used in support of teaching, learning and research	Supports the creation, implementation, and evaluation of courses and curriculum activities related to teaching and learning	Finds and/or creates information to support research and teaching
Project Management	Information Resources & Products	Curriculum Support & Information Research	Research Methodologies & Specialized Databases/Programming
Develops and maintains project management processes, tools Manages project pipeline Manages & tracks	Provides intellectual oversight for collections Educates KLS about the contemporary collection contents Develops self-service tools and learning	Positions business information, creates information products, and enables information research capability development for lifelong learning	Provides information research support to faculty, doctoral students, HBS administrators

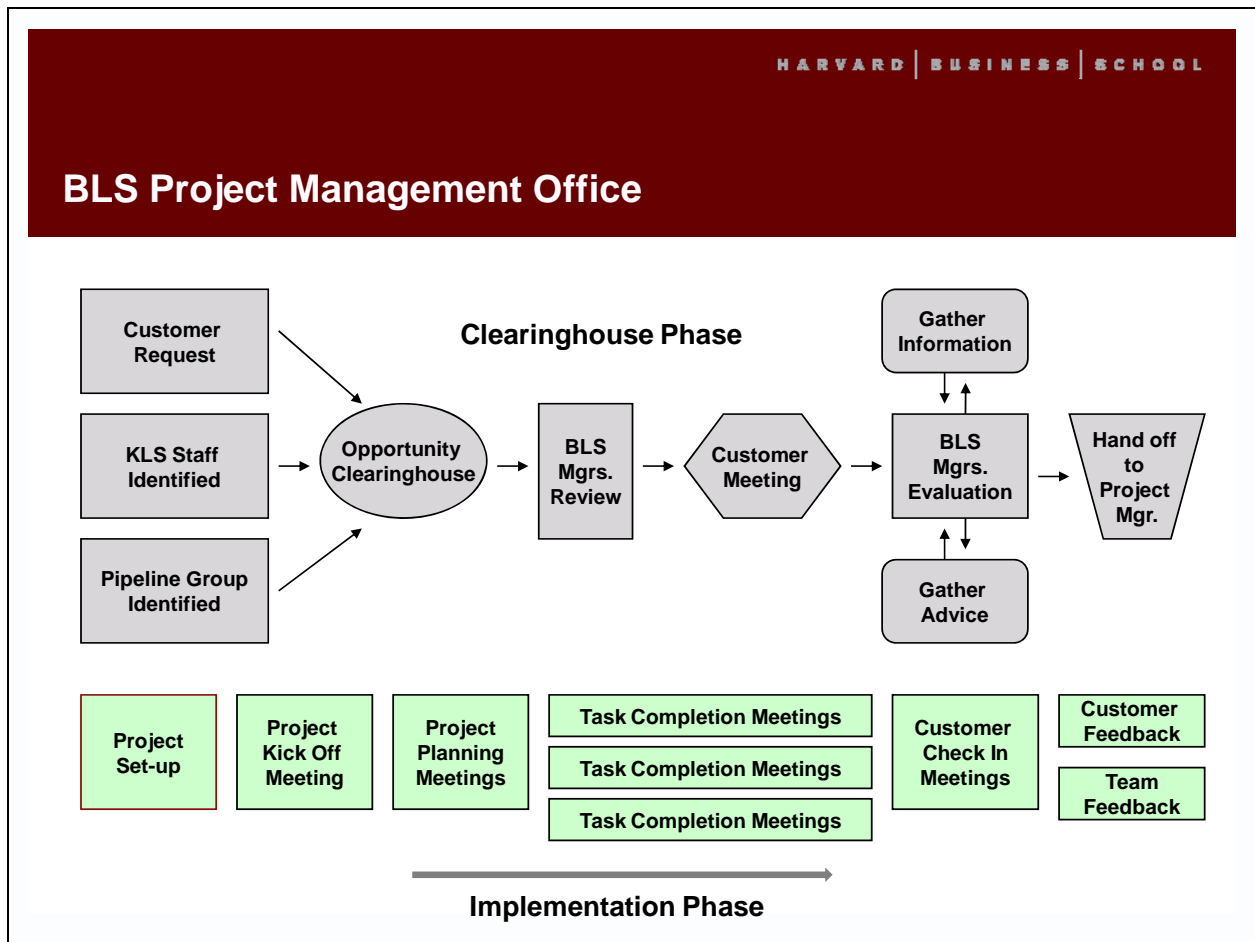
<p>resource allocation                  Collects and analyzes BLS statistics                  Facilitates user access to information resources                  Maintains Stamps Reading Room, Stacks, Exchange                  Manages library systems                  Provides DocDel/III Services</p>	<p>resources                  Responsible for BL BC Website Content</p>	<p>Supports student and alumni information research needs</p>	
<p>1</p>	<p>0 &amp; 1-4 support</p>	<p>1-4</p>	<p>1-4</p>

**Appendix D: Research Support Continuum**

Appendix E: BLS Service Delivery Model



Appendix F: BLS PMO – Work Process Design Flow Diagram





**Appendix G: Research and Course Development Collaboration Environment – Pilot Project Example**

