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The RLG Partnership

Note: This is a pre-print version of a paper forthcoming in *Journal of Library Administration*. Please cite the published version; a suggested citation appears below. Correspondence about the article may be sent to the authors at [email address].

Abstract
Created in 2006 with the coming together of RLG and OCLC, the RLG Partnership is a transnational research venue for libraries, archives and museums. In concert with OCLC Research, the RLG Partnership focuses on a work agenda that includes system-wide organization and interactions of libraries, archives and museums; research information management; mobilizing unique materials in collections; metadata support and management; and infrastructure to support metadata flow in the Web environment.

Keywords
research libraries; research; archives; museums; scholarship; digital surrogates; global systems; best practices; architecture; standards; research community

Suggested citation:
Michalko, James. 2009. "The RLG Partnership." *Journal of Library Administration*, 49,6: 695-700. Pre-print available online at:
http://www.oclc.org/research/publications/library/2009/michalko-jla.pdf.

At the present time the RLG Partnership consists of over 150 institutions that have chosen to affiliate in this special venue sponsored by the Online Library Center (OCLC) and supported by OCLC Research. These institutions support the work of the Partnership through the payment of annual dues and active staff engagement in a program of work. These are self-selected institutions that want to work with similarly motivated institutions to address architectural, workflow, and service issues in the design of their future services.

Within OCLC, the RLG Partnership is unique. It is a transnational research venue for institutions wishing to coordinate their efforts and address the grand challenges (and opportunities) confronting research information organizations. Staff from the OCLC Research division coordinate and support the efforts of these affiliated libraries, archives, and museums. Through active collaboration, these RLG Partners develop shared solutions, participate in innovative experiments, assist in the design and testing of new prototypes, and reach consensus on exciting new approaches to shared challenges.

For libraries and other cultural organizations prepared to invest resources and staff expertise in collaboratively designing innovative programs and future services, the RLG Partnership is a global alliance of like-minded institutions that focuses on making operational processes more efficient and shaping new scholarly services by directly engaging senior managers. Unlike other regional, trade, or issue-driven groups in the community, the RLG Partnership is supported by the full capacities of OCLC Research. The Partnership influences and directs a substantial portion of the OCLC Research effort. It proceeds from an international, system-wide perspective, and it connects to the broad array of OCLC products and services.

Today's libraries, archives, and museums have to manage their collections differently, organize what they deliver more effectively, and create new infrastructures to sustain a new service array in order to be a valued part of the scholarly process. Confronted with disruptive technologies and challenging economics, they must genuinely transform how they make their collections available to their users—a feat that is beyond the ability of an individual institution. Libraries, archives, and museums prepared to invest and lead on these challenges and create a new future find the RLG Partnership an important part of their response.

THE COMBINATION

This special venue within OCLC was created during the merger of the Research Libraries Group, Inc. (RLG) into OCLC in July 2006.

During the discussions leading to the merger it became clear that both organizations wanted to grow their support for research institutions and that what was needed and wanted by research institutions could best be delivered by joining the distinctive capabilities of the two. Moreover, the institutions served by both organizations would benefit from economies achieved through integration of services.

The combined capabilities of both organizations would support an exceptional agenda for libraries, archives, and museums focused on applied research, community building, and prototyping of systems and services.

There were two key components to the combination: (a) the creation of a venue within OCLC Research that would support the RLG Partnership (the programmatic and leadership component of RLG's traditional activities); and (b) the integration of RLG's online products and services with OCLC's service lines.

The goal in establishing a venue for research institutions within OCLC was to reinvent for the 21st century effective forms of collaborative action. Renewed collective effectiveness depended on a broader range of capacities than either could provide alone. Within RLG the emphasis of many decades had been on collective issue identification, community building, and consensus making. OCLC Research provided the community with deep expertise in beta development, tool building, data mining and business intelligence, and broad enabling architectures and infrastructure.

With libraries, archives, and museums challenged by disruptive technologies that have altered information consumer behavior and made our operating environments increasingly uncompetitive, the combination of RLG Programs' experience with OCLC Research's expertise could support collective action with a much broader range of capabilities.

THE CONTEXT

The RLG Partnership shares a point of view about the current information context, the institutional operating environment, and the implications for the future of research collections.

In particular we think that within a generation the library's information sources and delivery services will be largely virtual. Libraries will continue to provide direct access to physical materials, but this will be very much focused on the special demands of their local constituencies. "Comprehensive" research collection building will be done by a very small number of institutions, while special collections of the special or unique materials of research will be maintained and featured at many institutions.

Within 10 years museums and archives will expand their primary missions to emphasize widely disseminated disclosure of their collections and the routine provision of digital surrogates of those collections.

The primary mission of cultural institutions will be to provide access to trustworthy, authoritative information in support of the research, teaching, and learning process.

Providing tools and services that enhance research and learning productivity around those knowledge resources will be a vital part of institutional operations.

Institutions will discharge this mission in new ways and provide alternatives for many of their traditional activities. Redundant physical collections will be consolidated and managed via a centralized system and set of processes. Library purchase or provision of physical materials not held locally will be done largely on demand, based on examination of digital surrogates. Disclosing what an institution collects and licenses in the most efficacious fashion will be a major investment.

Collecting materials that are distinctive to local mission and milieu will define research-focused institutions, while being an activity in which all libraries engage. This includes locally created intellectual assets, as well as those procured externally. As collecting activities become more focused on rare and unique materials, libraries, archives, and museums will increasingly depend on shared standards, processes, and technology. Moreover, there will be major reorganizations of staffing effort and major shifts in the types of staff expertise required to maintain vibrant and valued arrays of teaching, learning, and research support.

Based on this view of the future, the RLG Partnership supported by OCLC Research has committed itself to a continuing work agenda that can impact this future while at the same time preserving and renewing the value of research libraries, archives, and museums, thereby ensuring that they are important in the emerging new processes by which research is done and learning occurs.

THE WAY THE PARTNERSHIP WORKS AND ITS AGENDA

Where the Partnership invests effort reflects key areas for shared attention and collaborative action. The following criteria are consistent with the capabilities of OCLC Research and serve as a way of identifying priorities and maximizing impact as we help libraries, archives, and museums design their future. The criteria include:

- Eliminates a redundant effort or process
- Affects system-wide behaviors
- Creates shared capacity
- Changes community economics
- Cuts across cultural sectors
- Transforms something (process, standard, etc.) into a routine
- Translates something (process, standard, etc.) into community terms
- Responds to a known and shared Partner need
- Provides opportunities for Partner engagement

The actual work agenda is dynamic and influenced by the advisory body elected from staff within RLG Partner institutions. Because of the emphasis on changed operational processes and new services, our advisors usually come from the senior manager cohort within Partner institutions. They are the ones charged with making these changes real and are best positioned to advise on the collective contributions that could make these changes faster, more effective, or more efficient.

The current agenda of the RLG Partnership has five broad themes representing persistent areas of shared uncertainty and change for the communities we serve. They also represent areas where a leadership subset of the Partnership could make an impact, areas where OCLC Research brings distinctive capabilities, and areas where other organizations have not successfully engaged.

Initial program focus areas include the following.

The first program focus is on system-wide organization, where the objective is to provide the evidence and the frameworks that will allow libraries and other cultural institutions to reshape their services based on a broad understanding of how individual institutions are parts in broad and complex regional and global systems of service provision. Areas of interest include user studies; the interactions of libraries, archives, and museums; system-level risks and challenges; and finally, methods for managing print collections as a collective resource.

The second area is in research information management. Here, the objective is to reach a collective understanding of the responsibilities of and opportunities for libraries in an environment where research is done differently and E-research becomes the norm. The Partnership is exploring new prospects for adding value to the scholarly communication process, helping scholars get the most out of new technologies that can enhance the quality of their work, and helping academic institutions with the assessment of their research outputs.

Mobilizing unique materials is the third area of focus. The objective is to achieve economies and efficiencies that permit these unique materials in archives and museums to be effectively described, properly disclosed, successfully discovered, and appropriately delivered. Overall the RLG Partnership wants to bring about greater collaboration among libraries, archives, and museums by surfacing models for sharing data, services, and expertise.

The fourth area is in metadata support and management, whose purpose is to provide new structures for controlled data and improve current metadata workflows. As new service ambitions emerge that allow library, archive, and museum processes to be done at their most efficient level—locally, regionally, or globally—new structures for controlled data will be necessary as will changes to the current flows of metadata between the machine systems that consume and depend on these services. We can advance this by providing prototypes that demonstrate the value of aggregating, enriching, disclosing, or

manipulating structured data for use in different discovery and metadata creation environments.

Finally, the Partnership is focusing on infrastructure and organization to enable consistent, reliable metadata flows in the Web environment through the provision of Web development tools, reference implementations, and the management of identifiers. All of these provide important scaffolding on which the library, archive, and museum community can rely as they build new services.

OUTPUTS OF THE PARTNERSHIP

The outputs of the RLG Partnership efforts may be about creating change and building community, synthesizing best practices and supporting architecture or standards that embody those practices, delivering beta development or tools, and providing evidence for decision making and future change, research work, best practices, specifications, and prototypes.

The activities of building change and creating community are associated with mobilizing the library, archive, and museum community in support of collaborative action and reform of inefficient workflows, or building consensus about a preferred set of solutions. They are characterized by direct engagement with members of the RLG Partnership and other research institutions in shared work and expressed in authoritative recommendations or "blueprints" for community change. For example, editorial pieces are created that are intended to stimulate community response and that include specific recommendations for changed practice or investment of resources. Working groups provide direct engagement opportunities for the members of the RLG Partnership to shape outcomes of our work. Partner events are held with a thematic focus on consensus building or agenda planning.

The Partnership's engagement in best practices, architecture, and standards ranges from recommendations to architectural implementations. There is a continuum for many projects, including final recommendations or conceptual frameworks.

Beta development involves the creation of experimental software or systems to explore ideas (proof-of-concept), elicit feedback, and confirm interest in a proposed design. Access to beta software, tools, or systems may be open to the world or limited to select groups of users.

Another important output of the Partnership is developing evidence. This activity is about building context around problems and discussions, including such work as data-mining studies that provide an empirical context for issues of interest and/or support decision making; user studies that illuminate important aspects of information-seeking behaviors; literature reviews/ syntheses that summarize current thinking in a particular area; and technology watch reports that educate the community on important technologies, standards, etc. The common theme to all work in this area is that it is aimed at furthering

understanding: of the contours of an issue or problem, of the user community, of a new technology, and so on.

Through deliberate investment and leadership the RLG Partnership can help libraries, archives, and museums design compelling new institutional futures, building and delivering collections and services that are responsive to a dynamic information context. The aim of the Partnership is to enhance the ways in which libraries, archives, and museums create value in the research and learning process.