

Portal Opportunities Implementation Group Charge

In support of the library's strategic plan for Integrated Access, ILTS (then called the Systems Office) hosted a retreat in December 2003 to explore integrated technology initiatives using Lorcan Dempsey's white paper "The recombinant library: portals and people" (http://www.oclc.org/research/staff/dempsey/recombinant_library/default.htm), as a key talking point. A crucial conclusion reached in the retreat was that in an increasingly diverse online environment, the Library cannot hope to become the sole portal of choice for researchers. The Library needs to work diligently to integrate Library resources and services in other local and national online research environments. In December 2004, the Portal Opportunities group (POG) was charged by the Integrated Access Council to follow up on this conclusion and identify specific opportunities to "embed Library resources and services in the diverse environments where readers and researchers conduct their daily intellectual lives – course management systems, non-library portals, personal information management tools, etc." POG was charged to investigate and document library portal and interface development projects at peer institutions and at Yale, then recommend specific avenues for focused development in the Library, with particular emphasis on opportunities presented by the implementation of the Sakai learning management system (LMS) at Yale.

After reviewing projects at other institutions as well as the developing portal and LMS environment at Yale, the members of POG arrived at a series of policy recommendations supported by IAC and a list of potential library integration projects that will maintain the library's visibility at Yale and serve users at their point of need. The Portal Opportunities Implementation Group, a cross-departmental committee formed to promote library service implementation, integration, and advocacy in the Portal / LMS environment, will follow up on the work of POG. The group's overall charge is to facilitate the implementation of integrated access initiatives in this environment.

The group, under the sponsorship of IAC, will:

- Continue to investigate and encourage communication about ongoing portal and learning management system projects at Yale and other institutions, through activities like serving on University-wide committees related to Portal and course management system activity.
- Evaluate, document, and disseminate integrated access standards, policies and practices in order to encourage library and vendor compliance with these standards.
- Periodically inform Yale faculty and staff of portal technology developments, standards, policies, best practices and implementation issues via Yulib postings, Forums, and other communication methods.
- Develop a detailed, prioritized description of the POG recommended projects, including:

- An impact analysis in terms of both patrons and Library departments
 - A functional analysis of the infrastructure required to implement the projects.
 - Memorandum of specific project recommendations for IAC approval and LMT action.
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- Collaborate with faculty, students, ITS staff, library departments, and committees in order to advocate for and track POG projects as they are implemented.
 - Working with the Library Usability Program, conduct assessment activities to determine user needs and usability of new services recommended in the report.
 - Work with Library Human Resources and other appropriate groups to create a training program for library staff focused on new library services in the portal / Sakai environment.
 - Report regularly to the Integrated Access Council and the Research and Planning Group.
 - The purpose of the Portal Opportunities Implementation Group will be reviewed every two years in IAC. Members will serve a two-year term, subject to renewal.

Core Membership

Katie Bauer
Emily Horning
Julie Linden
Roy Lechich
Scott Matheson
Karen Reardon
Judy Spak
Kalee Sprague (chair)

Consultants

Katherine Aydelott
Jeffrey Barnett
Matthew Beacom
Audrey Novak
Jennifer Weintraub