Collaboration and Convergence

Boundary-spanning leadership in libraries, archives, and museums

Katherine Skinner, PhD
IMLS, February 23, 2017
Presentation Roadmap

• Educopia’s mission and methods
• LAM-learning projects 2013-2017
  – Five projects and their intersection points
  – General application of methods
• Deeper dives
  – Coalition to Advance Learning
  – Mapping the Landscapes
  – Nexus and Nexus LAB
• Next steps
Presentation Roadmap

• Educopia’s mission and methods
Educopia’s mission

The Educopia Institute advances cultural, scientific, and scholarly institutions by catalyzing networks and collaborative communities to leverage and advance expertise, infrastructure, and information.

Photo Credit: Hudson Hintz, https://unsplash.com/@hudsonography?photo=ZTO5ntSqUKA
Systems tend toward stasis

Critical transitions are rare and recognizable

Human networks move innovations from fringe to center

Change depends on the support of networks of people

alignment is a transformative tactic
Methodology: Boundary-Spanning

buffering
reflecting
connecting
mobilizing
weaving
transforming
Methodology: Collective Impact
Cascading Levels of Collaboration

COMMON AGENDA

- Governance, Vision, and Strategy
- Action Planning
- Execution
- Public Will

- Steering Committee
- Working Groups
- Partners
- Community Members

(Shared measures)
Presentation Roadmap

• Educopia’s mission and methods

• LAM-learning projects 2013-2017
  – Five projects and their intersection points
  – General findings across the projects
Four projects, intersecting goals

• “Nexus: Spanning Boundaries”
  Educopia, 2013-14

• “Coalition for National Learning”
  OCLC/WebJunction, 2013-15; 2015-16

• “Mapping the Landscapes”
  Educopia, 2015-16

• “Nexus Leading Across Boundaries (LAB)”
  Educopia, 2014-2017
First there were 2...

Nexus: Spanning Boundaries
Educopia
2013-14
(Library focused)

Coalition for National Learning
OCLC/WebJunction
2013-15
(LAM focused)
Then we grew...

- Nexus: Spanning Boundaries
  Educopia
  2013-14
  (library focused)

- Nexus: Leading Across Boundaries
  Educopia
  2014-17
  (LAM focused)

- Coalition for National Learning
  OCLC/WebJunction
  2013-15
  (LAM focused)

- Coalition to Advance Learning
  OCLC/WebJunction
  2015-16
  (LAM focused)

- Mapping the Landscapes
  Educopia/ATSOTF Task Force
  2015-16
  (LAM focused)
Four projects, intersecting goals

Accelerate the spread of good ideas
Access diverse perspectives across stakeholders
Increase impact and reduce duplication of effort
Develop and strengthen community
Scale and extend LAM learning

Photo Credit: Pietro de Grandi, https://unsplash.com/search/bicycle?photo=TDFtL-teb5c
Theory behind the projects

Mission alignment positions libraries, archives, and museums to collaborate.
Finding #1

While LAM missions may be aligned, wide variance across them must be addressed:

- staffing models
- funding models
- organizational sizes
- governance structures
- user communities served
- disciplinary specializations
- acronyms and vocabularies
Finding #2

For multi-stakeholder initiatives, structure is key!

• Identifying an institution that can serve as “lead”
• Identifying the right stakeholders
• Mindfully addressing invitations (From whom? To whom?)
• Establishing a neutral meeting point and trusted “backbone”
• Reinforcing boundaries before attempting to span them
• Working towards concrete shared goals & shared measurement
• Cultivate “networked leadership”
• Design work so as to privilege all member voices and input
  – This last one is so much more difficult than it appears!
Finding #3

Areas particularly ripe for networked leadership:

• Education and professional development
  – Needs assessments, supply analyses, targeted offerings
• Technology transitions
  – Digital curation, digital forensics, digital preservation
• Funding, policy, and visibility challenges
• Leadership challenges
  – Succession planning
Presentation Roadmap

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• Deeper dives
  – Coalition to Advance Learning
  – Mapping the Landscapes
  – Nexus and Nexus LAB
Coalition to Advance Learning

3-Part Webcast Series

Stories of Inclusion: Inclusive Practices at Cultural Institutions

October 7, 14 and 28, 2015
2–3:30 p.m. (ET)

THE COALITION TO ADVANCE LEARNING IN ARCHIVES, LIBRARIES AND MUSEUMS

LEARNING BETTER TOGETHER

The Coalition to Advance Learning aligns around a common purpose—to work in deliberate coordination across boundaries to advance sustainable continuing education and professional development (CEPD) programs that will transform our profession and strengthen a nation of learners.

Welcome to The Coalition to Advance Learning in Archives, Libraries and Museums website!
Coalition to Advance Learning

Research
- Data sets
- Survey instruments
- Evaluation tools

National Agenda

CE/PD Exploration & Frameworks
- Leadership (Nexus)
- Diversity/Inclusion
- Other Topics

Communities of practice

In-person cross-sector opportunities

“Knowledge Diffusion” as organizing principle
Mapping the Landscapes

Leverage community partnerships in order to document the continuing education/professional development needs of staff in and across libraries, archives, and museums.

Mapping the Landscapes Team

- Academy of Certified Archivists
- ALA/SAA/AAM Committee on Archives, Libraries, and Museums (CALM)
- American Institute for Conservation of Historic and Artistic Works
- Association for Information Science and Technology
- Association for Library Collections and Technical Services
- Association of Academic Museums and Galleries
- Association of Children's Museums
- Association of College and Research Libraries
- Association of Midwest Museums
- Association of Research Libraries
- Association of Science-Technology Centers
- Association of Southeastern Research Libraries
- Califa
- Chief Officers of State Library Agencies
- Council of State Archivists
- Digital Preservation Management Workshop
- Educopia Institute
- Heritage Preservation
- InfoPeople
- Internet Archive
- Library Information Technology Association
- Lyra
- Midwest Archives Conference
- Mid-Atlantic Regional Archives Conference
- National Association for Interpretation
- National Association of Government Archives and Records Administrators
- New England Museum Association
- New Media Consortium
- North American Serials Interest Group (NASIG)
- Northeast Document Conservation Center
- OCLC
- Public Knowledge Project (PKP) School
- Public Library Association
- Regional Archival Associations Consortium
- Society of American Archivists
- Southeastern Museums Conference
- Urban Libraries Council
- Virginia Association of Museums
Mapping the Landscapes Team

- Project Leadership
  - Coalition to Advance Learning
  - Educopia

- Partner Advisory Board
  - 38 Partners

- External Consultants
  - Lyrasis
  - TrueBearing

- Task Forces
  - Survey
  - Focus Groups
  - Field Assessment

Graphic by Christina Drummond, Educopia
What we’ve produced

• Field Research
  – Spanning Boundaries report
  – Needs Assessment “how to” guide
• Focus Group methodology and questions
• Survey instrument and competencies map
• Data from surveys and focus groups
• Analysis
  – Self-Identified LAM Professional Development Needs
  – Tableau dashboards
Mapping the Landscapes

Spanning Our Field Boundaries: Mindfully Managing LAM Collaborations

LAM Education Needs Assessments: Bridging the Gaps

Community Needs

Field-wide  Organization  Individual
Mapping the Landscapes

Focus Groups hosted 2015-16:

- SAA
- AASLH
- ALA
- AAM
- Virtual
98 shared competencies organized into:

- 6 areas: basic operations, collections, institutional management, leadership, technology, and public-facing
- 25 sub-areas (in total)

### Table 2: Source lists of professional competencies

<table>
<thead>
<tr>
<th>Organizational Source</th>
<th>Competency Document</th>
</tr>
</thead>
<tbody>
<tr>
<td>Archives</td>
<td></td>
</tr>
<tr>
<td>National Archives and Records Administration (NARA)</td>
<td>Competency Models – Core, General and Technical</td>
</tr>
<tr>
<td>Society of American Archivists (SAA)</td>
<td>Guidelines for Archival Continuing education (ACE)</td>
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<tr>
<td>Libraries</td>
<td></td>
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<tr>
<td>OCLC Online Computer Library Center, Inc. WebJunction</td>
<td>Competency Index for the Library Field</td>
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<td>Special Libraries Association (SLA)</td>
<td>Competencies for Information Professionals of the 21st Century</td>
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<td>Museums</td>
<td></td>
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<tr>
<td>International Council of Museums (ICOM)</td>
<td>Curricula Guidelines for Museum Professional Development</td>
</tr>
<tr>
<td>Committee on Museum Professional Training, American Association of Museums</td>
<td>Training for Entry-Level Museum Professionals</td>
</tr>
<tr>
<td>American Institute for Conservation of Historic and Artistic Works (AIC)</td>
<td>Defining the Conservator: Essential Competencies, and Requisite Competencies for Conservation Technicians and Collections Care Specialists</td>
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</tbody>
</table>

### Table: Common LAM Competency Taxonomy

<table>
<thead>
<tr>
<th>Competency Area</th>
<th>Competency Sub-Area</th>
<th>Competency</th>
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</thead>
<tbody>
<tr>
<td>I. Basic</td>
<td>A. Research</td>
<td>1. Methodologies for research</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Methodologies for research</td>
</tr>
<tr>
<td></td>
<td>B. Project Management</td>
<td>1. Project management principles</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Lead work teams</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3. Monitor/Adapt project progress</td>
</tr>
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<td></td>
<td>C. Awareness of Professional Context</td>
<td>1. Theoretical/historical professional underpinnings</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Basic professional models of practice</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3. Relationships with allied professions</td>
</tr>
<tr>
<td></td>
<td></td>
<td>4. Record-keeping</td>
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<tr>
<td></td>
<td></td>
<td>5. Professional standards and best practices</td>
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<td></td>
<td>D. Professional Ethics</td>
<td>1. Draw on basic values and ethics of sector</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Laws, regulations, institutional policies, ethical standards</td>
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<tr>
<td></td>
<td></td>
<td>3. Culture of ethics/accountability</td>
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<tr>
<td></td>
<td>E. Communication</td>
<td>1. Variety of communication methods</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Communicate effectively with diverse audiences</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3. Situation-specific communication</td>
</tr>
<tr>
<td></td>
<td>F. Collaboration</td>
<td>1. Develop relationships to achieve common goals</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Work effectively in teams</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3. Manage org. politics, conflict, difficult coworkers</td>
</tr>
</tbody>
</table>
Mapping the Landscapes
Data sources

- 61 focus group participants
- 2,788 survey respondents

![Focus Group and Survey Participant Count](image)

Figure 1: Focus Group and Survey Participant Count

Mapping the Landscapes

Use PDF Bookmarks to navigate quickly to a competency area of interest.

Nexus: Leading Across Boundaries (LAB)

Build a community for the experts providing museums, archives, and libraries leadership training to:

1. increase trainer capacity through cross-sector knowledge sharing and curriculum and evaluation resource development

2. develop a network of leadership trainers for cultural memory institutions

Photo Credit: Clem Onojeghuo, https://unsplash.com/search/cross?photo=VIrwcwdr2Bc
Nexus LAB Team

Archives
• Academy of Certified Archivists
• Archives Leadership Institute
• Council of State Archivists
• Regional Archival Associations Consortium
• Society of American Archivists

Museums
• American Association for State and Local History
• Association of Zoos and Aquariums
• Getty Leadership Institute
• Institute for Cultural Entrepreneurship
• Johns Hopkins Museum Studies Program
• Mid-Atlantic Association of Museums
• Mountain-Plains Museums Association
• Southeastern Museum Conference

Libraries
• ALA, Public Program Office
• Association of College and Research Libraries
• Association of Research Libraries
• Chief Officers of State Library Agencies
• Illinois State Library ILEAD U
• Medical Library Association
• National Library of Medicine / Association of Academic Health Science Libraries
• Online Computer Library Center
• Public Library Association
• Virginia Tech Libraries

Multi-Perspective
• Council on Library and Information Resources
• Dartmouth College
• Ithaka S&R
• Maureen Sullivan Associates
• University of North Carolina - Chapel Hill SILS
• University of North Texas

Core Consultants
• Center for Creative Leadership
• TrueBearing Consulting
• Toolkit Consulting

Photo Credit: Clem Onojeghuo, https://unsplash.com/search/cross?photo=VIrwcwdr2Bc
Nexus LAB Team
Nexus LAB: What we’ve produced

• Common Leadership Competency Framework
  Layers of Leadership across Archives, Libraries, and Museums

• Evaluation Suite (in pilot phase, open invitation)
  Pre/Post event and 3-6 month impact assessment tools connected to common competencies

• Curricular Resources (in pilot phase, open invitation)
  Open, adaptable instructor guides, slide decks and learning aides for seven “leading the field/profession” level topics

Photo Credit: Clem Onojeghuo, https://unsplash.com/search/cross?photo=VIrwcdwdr2Bc
Nexus LAB: Layers of Leadership

• Series of 6 frameworks
• Leadership competencies and related outcomes for each
• Co-produced and built upon CCL 360 by Design competency library
## Nexus LAB: Layer 6

### Nexus LAB: Layers of Leadership across Libraries, Archives and Museums

#### Layer 6 – Leading the Profession: Design Framework

<table>
<thead>
<tr>
<th>My daily challenge</th>
<th>Key leadership tasks</th>
<th>Skills to perform tasks</th>
<th>Change I (and others) want to see</th>
<th>Greater outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>“How do I make an impact on the growth, development, sustainability and reputation of my profession?”</td>
<td>In order to develop as a leader in my profession, I need to excel at:</td>
<td>Role-specific skills</td>
<td>By the end of the training, leaders will be able to:</td>
<td>At my organization</td>
</tr>
<tr>
<td></td>
<td>Practicing and communicating thought leadership</td>
<td>Negotiate political entities</td>
<td>Articulate issues shared by archives, libraries, and museums</td>
<td>Across Libraries, Archives, and Museums</td>
</tr>
<tr>
<td></td>
<td>Challenging norms</td>
<td>Gather, synthesize, test, adapt and use ideas and information from across LAMs, nonprofit and for-profit sectors</td>
<td>Articulate/develop standards and best practices/models/case studies for collaboration across libraries, archives, and museums</td>
<td></td>
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<tr>
<td></td>
<td>Ensuring scalability and sustainability</td>
<td>Sharpen critical thinking, writing, and speaking skills</td>
<td>Diplomatically draw divergent voices into conversations about the future of libraries, archives, and museums</td>
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<td></td>
<td>Building relationships/forging networks across libraries, archives, and museums to break down silos</td>
<td>Lead or participate in large-scale change efforts that can be used across LAMs</td>
<td>Work leading the profession into my daily/weekly/monthly routines</td>
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<td></td>
<td>Seeing and understanding libraries, archives, and museums holistically, as a single integrated ecosystem</td>
<td>Build strong cases for change that can be used across LAMs</td>
<td>Be transparent and trusted</td>
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<tr>
<td></td>
<td>Interacting and partnering with library, archives and museum leadership nationally and internationally</td>
<td>Work leading the profession into my daily/weekly/monthly routines</td>
<td>Shared skills</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Key Role: Help my profession constructively examine itself and evolve</td>
<td>By the end of the training, leaders will be able to:</td>
<td>Leading organizational culture</td>
<td>At my organization</td>
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<td></td>
<td>Role-specific skills</td>
<td>Negotiate political entities</td>
<td>At my organization</td>
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<td>– Practicing and communicating thought leadership</td>
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<td>– Challenging norms</td>
<td>Sharpen critical thinking, writing, and speaking skills</td>
<td>At my organization</td>
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<td>– Seeing and understanding libraries, archives, and museums holistically, as a single integrated ecosystem</td>
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<td>At my organization</td>
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<td></td>
<td>– Interacting and partnering with library, archives and museum leadership nationally and internationally</td>
<td>Be transparent and trusted</td>
<td>At my organization</td>
<td></td>
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<tr>
<td></td>
<td>Shared skills</td>
<td>LEADERSHIPS:</td>
<td>Lead innovation strategy</td>
<td></td>
</tr>
<tr>
<td></td>
<td>– Leading organizational culture</td>
<td>Transform the profession</td>
<td>Lead innovation strategy</td>
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<td></td>
<td>– Polarity thinking</td>
<td>Develop professional expertise</td>
<td>Lead innovation strategy</td>
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<tr>
<td></td>
<td>– Envision emerging polarities</td>
<td>Develop professional expertise</td>
<td>Lead innovation strategy</td>
<td></td>
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<tr>
<td></td>
<td>– Agile learning</td>
<td>Enable community partners to be actively learning</td>
<td>Lead innovation strategy</td>
<td></td>
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<tr>
<td></td>
<td>– Encourage community partners to be actively learning</td>
<td>Be transparent and trusted</td>
<td>Lead innovation strategy</td>
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<td></td>
<td>Effective communications</td>
<td>Appreciate strengths in self and others</td>
<td>Develop effective teams across organizational boundaries</td>
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<tr>
<td></td>
<td>– Persuasive and influential communicator</td>
<td>Influence without authority</td>
<td>Lead innovation strategy</td>
<td></td>
</tr>
<tr>
<td></td>
<td>– Appreciate strengths in self and others</td>
<td>Navigate multiple types of boundaries</td>
<td>Lead innovation strategy</td>
<td></td>
</tr>
<tr>
<td></td>
<td>– Spanning boundaries</td>
<td>Influence without authority</td>
<td>Lead innovation strategy</td>
<td></td>
</tr>
<tr>
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<td>– Influence without authority</td>
<td>Navigate multiple types of boundaries</td>
<td>Lead innovation strategy</td>
<td></td>
</tr>
<tr>
<td></td>
<td>– Develop expertise</td>
<td>Develop professional expertise</td>
<td>Lead innovation strategy</td>
<td></td>
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<tr>
<td></td>
<td>– Act as thought leader</td>
<td>Develop professional expertise</td>
<td>Lead innovation strategy</td>
<td></td>
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<td></td>
<td>– Develop professional expertise</td>
<td>Advocate voice for the profession</td>
<td>Lead innovation strategy</td>
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<tr>
<td></td>
<td>– Brand</td>
<td>Team-building</td>
<td>Lead innovation strategy</td>
<td></td>
</tr>
<tr>
<td></td>
<td>– Team-building</td>
<td>Build effective teams across organizational boundaries</td>
<td>Lead innovation strategy</td>
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<td></td>
<td>– Build effective teams across organizational boundaries</td>
<td>Innovation leadership</td>
<td>Lead innovation strategy</td>
<td></td>
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<tr>
<td></td>
<td>– Innovation leadership</td>
<td>Lead innovation strategy</td>
<td>Lead innovation strategy</td>
<td></td>
</tr>
<tr>
<td></td>
<td>– Lead innovation strategy</td>
<td>Cultivate culture of innovation</td>
<td>Lead innovation strategy</td>
<td></td>
</tr>
<tr>
<td></td>
<td>– Cultivate culture of innovation</td>
<td>Act as role model</td>
<td>Lead innovation strategy</td>
<td></td>
</tr>
<tr>
<td></td>
<td>– Act as role model</td>
<td>Greater recognition of organizational value within and across distinct communities</td>
<td>Greater recognition of organizational value within and across distinct communities</td>
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<tr>
<td></td>
<td></td>
<td>Recognition of organization as a critical part of the community fabric</td>
<td>Recognition of organization as a critical part of the community fabric</td>
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<tr>
<td></td>
<td></td>
<td>Libraries, archives, and museums have a stronger voice on national and international stages</td>
<td>Libraries, archives, and museums have a stronger voice on national and international stages</td>
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</tr>
</tbody>
</table>
Online Evaluation Suite pilot using Layers of Leadership Frameworks

- Testing competency-based impact-oriented evaluation tools
- Online survey engine (Survey Gizmo) allows instructors to select relevant leadership competencies for learner survey generation.

Three assessments
1. Pre-event
2. Immediate post-event
3. Follow-up 3-6 month out
Nexus LAB: 7 Curriculum Modules

inspired by Layer 6 - Leading the Profession/Field Layer

• Plug and play design

• Designed to work within multiple types of offerings: conference sessions, pre-conference workshops, existing programs

• Unbranded – meant to be customized/branded by instructors and programs

• Piloting through summer 2017
## Seven Nexus LAB Curriculum Module

### Topics

*inspired by *Leading the Profession/Field* Layer*

<table>
<thead>
<tr>
<th>Topic</th>
<th>Duration</th>
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<tbody>
<tr>
<td>Articulating the Case for Change</td>
<td>2 hours 20 minutes</td>
</tr>
<tr>
<td>Engaging Diverse Stakeholders to Lead Change</td>
<td>2 hours 10 minutes</td>
</tr>
<tr>
<td>Are you Moving the Needle? Assessing the Impact of Advocacy Efforts</td>
<td>1 hour 50 minutes</td>
</tr>
<tr>
<td>Fostering Innovation and Creativity</td>
<td>2 hours 30 minutes</td>
</tr>
<tr>
<td>Positioning your Organization in Community, Economic and Social Issues</td>
<td>2 hours</td>
</tr>
<tr>
<td>Building a Networked Approach to Leadership</td>
<td>2 hours</td>
</tr>
<tr>
<td>An Advocacy Primer for Libraries, Archives, &amp; Museums</td>
<td>2 hours 20 minutes</td>
</tr>
</tbody>
</table>
Curriculum Module Components

**Trainer’s Guide (.doc / .pdf)**

- Session walk-through with exercises, talking points, examples, resources

**Lightly formatted slides (.ppt)**

- For customization/branding

**Learning Aids (.doc / .pdf)**

- Supporting in-class activities and providing take-aways
## Pilot counts by target audience

<table>
<thead>
<tr>
<th></th>
<th>Libraries</th>
<th>Archives</th>
<th>Museums</th>
</tr>
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<tbody>
<tr>
<td>Curriculum pilots</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>scheduled</td>
<td>9</td>
<td>3</td>
<td>6</td>
</tr>
<tr>
<td>tentative</td>
<td>2</td>
<td></td>
<td>1</td>
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<tr>
<td>Evaluation pilots</td>
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<td></td>
<td></td>
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<tr>
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<td>11</td>
<td>2</td>
<td>5</td>
</tr>
<tr>
<td>tentative</td>
<td>8</td>
<td>2</td>
<td></td>
</tr>
</tbody>
</table>

- Session reflected multiple times if serving multiple audiences
- 15 pilot sessions in total: 3 evaluation only, 4 curriculum only
Next steps

• Needs Analysis, next steps (organization and field-level analyses to triangulate with individual)
• Supply Analysis (initial research completed by LYRASIS)
• Test efficacy of Nexus model in another topical area of importance (technology? diversity and inclusion?)
  – interested in how we might benchmark and access and analyze evaluation data that is generated at the point of classroom evaluation
Contact info:    Katherine Skinner
                404 783 2534
                katherine@educopia.org
                @educopia
                http://educopia.org