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**TRAINING TO MEET THE DIGITAL CHALLENGE:
REPORT ON THE SUMMER INSTITUTE ON CHINESE STUDIES
LIBRARIANSHIP IN THE ELECTRONIC ENVIRONMENT**

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Sponsored by the University of Washington (UW) Libraries in collaboration with the Committee on Chinese Materials (CCM) of Council on East Asian Libraries (CEAL) and many other institutions, the Summer Institute on Chinese Studies Librarianship in the Electronic Environment (hereafter referred as the Summer Institute) was successfully implemented on the campus of the University of Washington in Seattle, July 19-August 1, 2008. The Summer Institute was a training program designed to meet the urgent need of Chinese studies librarians to enhance their core competency in digital technology and leadership to provide high quality electronic library collections and services for Chinese studies in North America. Thirty-seven librarians from thirty major East Asian libraries in the United States and Canada participated. Twenty senior librarians and library school and China studies faculty members from the United States, Mainland China, and Taiwan taught or spoke at the Summer Institute. The Summer Institute was a great success. Its three components: the two-week rigorous on-campus classes (July 19-August 1); a one-and-half-day pre-conference, *the Symposium on CNKI Standards and Chinese e-Publishing* (July 19-20, 2008), co-sponsored by the Tong-fang Knowledge Network Technology Group and the University of Washington Libraries; and a post-curriculum field trip to Mainland China (October 16-24, 2008) have all received enthusiastic and positive feedback from participants.

Background

While the rapid development of information technology transforms our libraries, Librarians face unprecedented challenges of a changing work environment, changing collections, and a changing user population of different generations of users with very diverse information needs. All of these have heightened the expectations of librarians and information professionals, demanding that they reinvent library services and constantly renew their professional skills and knowledge. Chinese studies librarianship is a specialized area within library and information science. It requires librarians to have a particular combination of subject expertise, language proficiency, and information skills. Technology has resulted in rapid growth of electronic resources in the Chinese language demanding a different set of professional skills of Chinese studies librarians.

The need for training is evident; however, the lack of systematic education programs in professional schools of library and information science has caused the profession to lag behind in the provision of quality professionals to meet the country's need for Chinese studies librarians. In 1988, funded by a Department of Education grant, the East Asia Library at the University of Washington hosted The Summer Institute on East Asian Librarianship, a two-week in-depth training for East Asian Librarians held on the campus of the University of Washington. In 2004, thanks to the generous support of the Henry Luce Foundation, the Luce Summer Institute on East Asian Librarianship: China Focus was held at the University of Pittsburgh. This was the only in-depth training for Chinese studies librarians that had been offered in more than a decade. The 2004 training program received such positive feedback from its participants that there was a strong voice from the Chinese studies librarian community that such training be offered on a regular basis and more often.

In response to this need, the 2005-2008 CEAL CCM, chaired by Zhijia Shen, working closely with the libraries of the sponsoring institution, the University of Washington, initiated the planning and fund raising for another training program to be held at the University of Washington in the summer of 2008. Different from the 2004 training program, the 2008 summer institute was planned to focus on the electronic environment for Chinese studies librarianship. In November 2007, the Taskforce on the Summer Institute of the CEAL CCM (hereafter referred as CEAL Taskforce) was formed and approved by CEAL Executive Board with the charge of carrying out the task of the summer institute after the term of the 2005-2008 CCM ended in April, 2008. The CEAL Taskforce became an active member of the management team of the Summer Institute.

Management and Faculty

The Summer Institute was an international, national, multi-institutional, and inter-departmental collaboration involving scholars and librarians from Mainland China, Taiwan, all over the United States, and various departments of the University of Washington, pooling expertise and resources from all directions.

The management team consisted of deans and directors of the University of Washington Libraries, the Information School, the Jackson School of International Studies, and the East Asia Library; the CEAL Taskforce; and the Advisory Committee of senior East Asian librarians in the United States. The faculty and speakers reflected a broad spectrum of subject expertise and included senior librarians, library school faculty, and China studies faculty from Mainland China, Taiwan, and the United States.

Funding and Budget

The summer institute was extremely grateful to receive generous financial support from various grants and private donors from the United States, Taiwan, and Mainland China. It was truly an international joint venture aiming to enhance the proficiency of the librarians for Chinese studies to meet the need of learning, teaching, and research about China and Chinese culture in North America. With the strong support of the University of Washington Libraries, a total of \$92,250 was raised, including a grant of \$5,000 from the 21st Century Fund of the University of Washington Libraries, a grant of \$20,000 from the Chiang Ching-kuo Foundation, and a grant of \$25,000 from the Henry Luce Foundation. Private donors include Tongfang Knowledge Network Technology Group (TKN), China International Book Trading Corporation, Oripobe Information Services/Wanfang Data, SuperStar D-Library Information Technology Co., LTD, Apabi Technology Limited, Starmark International, Inc., China National Publishing Industry Trading Co., Transmission Books & Microinfo Co., Ltd., Pan Asian Publications, Inc., China Education Publications Import and Export Co., Sino Economic Books Import & Export Corporation, and National Library of China. In addition, the pre-conference symposium was fully funded by Tongfang Knowledge Network Technology. A complete list of supporters is posted on the Honor Roll at the institute's website <http://www.lib.washington.edu/east-asia/institute/sponsors.html>. To all our supporters and donors, we express our profound gratitude. It was their generosity that made this excellent training program possible.

Thanks to such generous support, the summer institute was able to provide all the participants free of charge single dorm-rooms and meal packets including large plans of breakfast, lunch, and snack; free tuition, teaching materials, and all the activities organized by the institute including local cultural tours and a field visit to Microsoft, as well as the opening and closing ceremonies, and a farewell party. The Summer Institute also awarded three travel grants.

Application and Selection Process and Participants

An application and admission process was used to select participants. The program was announced to the CEAL Listserv and the Listserv of the Chinese American Librarians Association early in 2007. An information gathering meeting was held with the "alumni" of the 2004 Luce Summer Institute during 2007 AAS/CEAL conference. During the application period, between December 2, 2007 and February 29, 2008, forty-eight applications were received. These applications were then reviewed by a review group formed of four CEAL taskforce members. In the review process, priorities were given to librarians 1) responsible for Chinese studies collections or services and who had a significant responsibility for Chinese studies 2) with two or more years of experience 3) in leadership or potential leadership positions. We made a special effort to accommodate as many applicants as possible. Thirty-seven applicants were admitted, including the seven CEAL Task Force members. A waiting list was established and used in the admission process. Online registration was completed on April 21, 2008. Each participant was required to pay a \$200 registration fee to reserve his/her space. A Q&A session was held for prospective participants during 2008 AAS/CEAL conference. Travel funds were made available to librarians from institutions that were unable to provide such support. Three librarians from the University of Florida, Arizona State University, and University of North Carolina at Chapel Hill received a travel stipend.

Pre-Conference Symposium

The Summer Institute started with a one-and-half-day intensive pre-conference symposium on CNKI standards and Chinese e-publishing. Ten senior librarians and library specialists from major academic libraries in the United States and Taiwan, and seven CNKI engineers and managers spoke at the symposium. All Summer Institute trainee librarians participated in the symposium discussions. The symposium provided our trainee librarians with an opportunity to learn how databases are designed and to give input on behalf of our library users. The symposium was an excellent way to begin the two weeks of training for librarianship in the electronic environment.

Program and Curriculum

The Summer Institute implemented a two-week rigorous program. The curriculum was made up of thirty-five classes, each lasting from 1 to 3 hours including several evening sessions. Classes touched upon all aspects of library collection and service in the digital age, including trends in research and publication in Chinese studies, collection development addressing issues of electronic resources in the Chinese script, digital technology, and hybrid libraries; cataloging and preservation of digital materials and digitization of unique local collections of individual libraries; library user services and bibliographic instruction using electronic resources; library management and creative leadership in handling digital collections and services; and the challenge of keeping pace with technology and staff development in the electronic age. The instruction languages of the Summer Institute were Chinese and/or English. Trainee librarians were expected to understand both languages.

The curriculum included the following topics:

- 1) Introduction to the state of the field of Chinese studies and publishing trends, to assist the trainee librarians to position their daily library work in the larger context of the academic field. Madeleine Dong, professor of Chinese History and Chair of the China Studies Program at the UW Jackson School for International Studies lectured on this topic. Kam-Wing Chan, Professor of geography at UW, who gave a presentation at the pre-conference symposium, also provided a discussion session at the summer institute.
- 2) Developing collections of electronic resources for Chinese language materials while balancing the print format, including selection and assessment of electronic resources, copyright and licensing issues. This was to enhance the trainees' skills in selecting and managing the acquisition process to optimize library budgets to build collections with integrity and reflecting the focus of the research and teaching missions of their home institutions. The classes provided participants with important tools and knowledge to handle new challenges. Tim Jewell, Director of Information Resources and Scholarly Communication, and Diane Grover, Electronic Resources Coordinator of UW Libraries; Yuan Zhou, curator of East Asian Library of University of Chicago; and Chuanfu Chen, professor and Dean of School of Information Management of Wuhan University in China, offered classes to address these issues.
- 3) The latest developments in information technology pertinent to the Chinese language, including language software, Internet skills relating to the Chinese script, digitization of Chinese language materials and the latest development in cataloging and using vendor records. Joyce Chao-Chen Chen, professor of information science and director of Taiwan Normal University Library; Jennifer Ward, web service librarian of University of Washington; Ann Lally, Head of Digital Initiative Program of University of Washington; and Jim Cheng, Head of the International Relations and Pacific Studies Library and East Asian Collections at the University of California San Diego, offered classes in these areas. Professor Allyson Carlyle of the UW Information School offered a class on the development of cataloging of electronic resources. There was also a discussion session led by Kuang-Tien Yao, Chinese studies librarian of University of Hawaii, to provide an opportunity for trainee librarians to share their experiences in utilizing vendor records for acquisitions. In addition, four major Chinese electronic-resource providers – CNKI, SuperStar, Wanfang Data, and Apabi, from Mainland China each provided a one-hour hands-on session about their latest products.
- 4) Current developments and accessibility of new electronic resources, virtual reference, faculty liaison, and library instruction on research methodology for Chinese studies using electronic resources. Long XIAO, professor and deputy director of Beijing University Library and Nancy Huling, Division Head

of Reference and Research Services, offered classes focusing on these issues.

5) Library management and leadership skills to address issues including fundraising, outreach, institutional collaboration and resource sharing, and staff development. The training also encouraged the future leaders of East Asian libraries to apply creative leadership to open up new areas of library services and to lead the profession in new directions of the digital information age. Dr. Hwa-Wei Lee, former chief of Asian Division of Library of Congress and Dean Emeritus of Ohio University Libraries, lectured on this important topic, providing both theoretical discussions and empirical perspectives toward library management. He also addressed the importance of leadership development tailored to address the particular concerns and needs of Chinese studies librarians.

6) A final project was completed by participants through their group work on various practical topics and problems. The final project was intended to allow the trainee librarians to explore solutions to some of the practical problems from their work, using the knowledge and skills learned from the summer institute. Completed final projects were submitted to the institute two weeks after the conclusion of the on-site classes and are now available on the institute's website.

7) Keynote speaker, Dr. Ching-chih Chen, Professor at Graduate School of Library and Information Science of Simmons College in Boston and an internationally renowned expert of information science and digital strategist, gave a two-hour keynote lecture at the opening ceremony entitled "Opening up Potentials: Use of Cutting-Edge Technology in Libraries with Chinese and Other Asian Collections." The inspirational keynote lecture set the stage for the two-week intensive curriculum.

Local Cultural Tours and Field Visit to Microsoft

The Summer Institute organized two local cultural tours in Seattle: a boat tour fully funded by Tongfang Knowledge Network Technology, and a city tour covering major historical sites in the Seattle area. In addition, participants and some faculty members took a weekend trip to Mount Rainer on their own. The cultural tours provided participants with local experience and understanding. A field visit to Microsoft was organized by the Summer Institute. On the Microsoft visit, presentations about the transition and services of Microsoft Research and library were given by Lee Dirks of MSR Scholarly Communication and Linda Shaw of MS Library. The presentations led to a lively discussion with the visiting trainee librarians about libraries in the future. Presentations were followed by a group tour to the "Center for Information Work," which showcased the evolving vision of Microsoft for the future of information work. The visit concluded with a reception in the Visitors Center, where various new computer technology and products on display were demonstrated. It was a very informative and enriching visit.

Opening and Closing Ceremonies

At the opening ceremony, Dean Betsy Wilson of the University of Washington Libraries, Director of the Summer Institute; Professor Anand Yang, Director of the Jackson School of International Studies and Associate Director of the Summer Institute; Professor Harry Bruce, Dean of the Information School and Associate Director of the Summer Institute, delivered welcome speeches. Philip Melzer, the immediate past president of CEAL, spoke about his personal experiences as a trainee librarian at the summer institute exactly twenty-years ago on the same UW campus in 1988. He commented that the concerns and reasons why we needed training twenty years ago still remain relevant today. Also at the opening ceremony, Ms. Peg Walther, Information Resource Officer, American Center for Educational Exchange, U.S. Embassy in Beijing, gave a speech. Ms. Walther is an alumna of the UW Information School. Twenty years ago, she was a graduate student serving as a note-taker for the summer institute in 1988. These inspirational speeches and stories of personal experience and memories connecting the two significant summer institutes in twenty years highlighted the UW tradition of service and dedication and vision about the education of East Asian librarians.

The Summer Institute concluded on August 1, 2008. A closing ceremony in the afternoon was made up of two parts: Commencement Addresses and Graduation. The Commencement Addresses featured four distinguished speakers, all world-renowned librarians and scholars. Dean Betsy Wilson spoke on "Leadership of Research Libraries in the 21st Century;" David Knechtges, Professor of Asian Languages and Literature at UW, on "Traditional Scholarship in the Digital Age;" Dean Harry Bruce on "The iSchool

and the future of LIS education;” and Eugene Wu, Librarian Emeritus of Harvard-Yenching Library, on “Improved Means to an Improved End: Observations on the Development of East Asian Libraries and the Training of East Asian Librarians in North America.”

These speeches touch upon issues concerning everybody who works in a library or uses library materials and services in our time of the digital revolution. They best concluded the two weeks of training, inspiring the trainee librarians to aim for more innovative ideas and visions for research libraries of the 21st Century. The commencement speeches now are mostly available at the website of the Summer Institute. At the Graduation, each participant received a certificate issued by the Summer Institute, framed in the official UW diploma holder, and individually handed to them by Dean Wilson, Director of the Summer Institute. Graduation was followed by a lively farewell dinner party in the Suzzallo Library.

Post-curriculum Field Trip to Mainland China

The Summer Institute organized a post-curriculum field trip to Beijing and Shanghai in Mainland China between October 16 and 24, 2008, to expand the knowledge and understanding of our trainee librarians. The field trip was optional; participants were responsible for all expenses. Twenty librarians were formed into the Delegation of Chinese Studies Librarians from North America led by the members of the Taskforce of the Summer Institute, who were Kuang-Tien Yao, Amy Tsiang, Su Chen, and Dianna Xu. The field trip was announced and made available on a first come first serve basis during application. On their first stop in Beijing, the group participated in the Celebration and Conference to mark the 50th Anniversary of the Information Center for Social Sciences of Renmin University of China, “*International Forum of Chinese Database: Perspectives on Collection Development and Usages*.” The members of the delegation presented a panel at this conference. In Beijing, the delegation visited the National Library of China, National Science Library, Beijing University Library, China Film Archives, Library of the Central Ethnicity University of China, and Museum of Ethnicity. In Shanghai, the delegation visited Fudan University Library and Shanghai Library. They also visited many electronic resource providers and book distributors in Beijing and Shanghai. The feedback from the participants about the trip was very positive. Those for whom this was their visit to China believed that this trip fundamentally changed their view of being a Chinese studies and East Asian librarian. The participants believe such a field trip is a necessary part of the professional training for Chinese studies librarians.

One important aspect of the summer institute was the development of its website to assist in fulfilling its mission effectively. The purpose of the website was to reach all Chinese studies librarians to make the training materials available to all in order to extend the impact of the Summer Institute. We understand that many more librarians need such training, but due to limited resources, only a small number of librarians were able to attend the training. The Summer Institute website has played a significant role in support of its participants and programs. To extend the benefit of the institute beyond its participants, we worked hard to provide as much information on our website as possible. Most curriculum materials including course syllabus, readings, lecture PPTs, as well as the final group projects done by the participants are available on the institute’s website. Except for the copyrighted reading materials, all curriculum materials are on the website and open to the public. We have also made available on the website the album of the Summer Institute and the journals from the field trip written by participants. The plan is to keep the website available to the public for two years or longer.

Evaluation Summary

An evaluation survey was conducted at the end of classes and thirty-two surveys were collected. The overall feedback about the Summer Institute was very positive. In response to the question “what did you find most useful of the Summer Institute program,” most participants commented that the information and training on the development of Chinese electronic collections and services in China and Taiwan, technology and best practices employed in developing digital projects and organizing digital materials, and lectures on copyright and licensing were the most helpful. They also valued the curriculum on trends in Chinese studies taught by China studies faculty and the opportunity to interact with China studies faculty about their concerns and expectations as library users. All trainee librarians pointed out that the opportunities to network with their peers through group discussions and group projects were most beneficial and the practical skills that they could immediately apply to work at

their home institutions were most appreciated. Participants highly praised the organization and management of the institute. They also provided very constructive suggestions for future trainings. For example, many people suggested that the class schedules be relaxed to allow more time for discussion and socialization. Also, more group projects instead of individual assignments would be more helpful. All suggested that such training be offered regularly, such as every three years.

Conclusion

The Summer Institute on Chinese Studies Librarianship in the Electronic Environment was a great success. It achieved its goals of providing booster training to renew the knowledge and skills of the practitioners of Chinese studies librarianship to prepare them for the challenges in handling electronic collections and services. It also enabled the participants to network and build professional connections with their colleagues, and served as a platform for participants to share experiences and skills. It was an institute to build leadership skills and to inspire innovative ideas for future Chinese studies librarianship of the digital age. Its significant impact on our profession will be felt by librarians and library users for many years to come.



Group photo at graduation



Group photo of pre-conference Symposium



Group photo of field trip participants at Renmin University in Beijing