

Robust Strategies: Combined Excerpt

From: Strategic Implications of AI Futures for Research Libraries: Workshop Report

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Robust Strategies Combined

The following strategies represent the robust strategies developed during the December 2025 workshop combined with the additional strategies, next steps, or expanded scopes added by Estlund and Hudson-Vitale in March 2026.

1. Workforce Development and Organizational Culture

- 1.1. **Strategy:** Invest in workforce development through AI literacy programs, staff upskilling, and pilot AI-integrated tools into select operations based on position readiness.

Timeline	Action Items
1-3 months	Map routine operational and administrative tasks across divisions and assess AI readiness of each
3-6 months	Develop a core AI/technology competency framework with tiered training pathways by role
6-12 months	Identify 2-5 “low-hanging fruit” workflow automations (e.g., note-taking, copy-cataloging, transcription, project management) to pilot immediately
Year 2	• Comprehensive training program operational and workforce model reviewed against library's strategic goals • Assess AI pilots and evaluate which to pursue as sustainable, scalable solutions • Identify 2-5 additional AI pilots

- 1.2. **Strategy:** Create flexible position descriptions, evolve staffing models to align with emerging needs, and recruit AI-savvy professionals.

Timeline	Action Items
1-6 months	• Draft updated or new position descriptions for AI-integrated roles • Evaluate all position descriptions to identify where tool-specific responsibilities can be expanded to accommodate new and evolving technologies • Transition roles where skills align with new AI-integrated responsibilities
6-12 months	Evaluate staffing models and organizational structures
As funding is available	Recruit for new positions with new AI-integrated expertise and expectations from the start

- 1.3. Establish an organizational mindset focused on agency, adaptability, and the design of future-ready solutions.

Timeline	Action Items
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1-3 months	• Explicitly define time and give permission for AI tool experimentation • Create a community of practice • Identify training programs for employees
3-6 months	• Hold a forum where individuals share how they have experimented with or used AI in their work • Coordinate calls/interactions with peer libraries to learn from each other
6-12 months	Integrate goals related to AI for next year's individual annual performance reviews

- 1.4. **New Strategy:** Develop library governance frameworks for agentic AI use, including authorization policies, auditability requirements, and containment protocols that define what library systems and data agents may access, modify, or act upon without human review.
- 1.5. **New Strategy:** Develop explicit AI limitation and refusal policies that affirm limiting or declining AI use in culturally sensitive collections, interactions with vulnerable populations, and contexts where human judgment is non-negotiable as sound professional practice, while establishing that wholesale refusal to engage with AI tools as part of one's professional role is inconsistent with the responsibilities of and an information-based profession and library work in the current environment. The profession's obligation is not uncritical adoption, but informed, principled, and accountable engagement.
- 1.6. **New Strategy:** Integrate assessment responsibilities across organizational roles and build an AI-era services assessment model that demonstrates library value through outcomes and trust. Establish an assessment framework that can credibly demonstrate the library's value when AI changes how users learn, write, search, and seek help. In an AI-saturated environment, success cannot be inferred from clicks or attendance alone. Libraries need a new evidence model that measures what public services uniquely deliver: improved research and learning outcomes, trusted guidance, responsible tool use, and equitable access to capabilities and expertise.

2. Collections, Technology & Infrastructure

- 2.1. **Strategy:** Leverage collections to train AI, prioritizing consent, cultural authority, provenance, and controlled use

Timeline	Action Items
1-6 months	• Review any agreements with third-party companies and organizations that have digitized materials from your collections, and understand the agreements for training AI models • Identify collections that should NOT be used for training AI due to cultural and social obligations or contractual agreements

	Identify a set of initial collections that could especially enhance the corpus of knowledge for AI training
6-12 months	- Seek broad range of values-based potential partnerships to leverage unique collections as training materials for AI - Evaluate if a RAG model or agent with a specific AI task/goal aligns with the initial set of collections

- 2.2. **Strategy:** Develop new approaches to collection management and metadata with an “AI-first” mindset

Timeline	Action Items
1-6 months	- Review any agreements with third-party companies and organizations where metadata is shared - Consider CC-0 license for library-created metadata where appropriate - Develop an AI review framework for subscription license terms
6-12 months	- Coordinate with peers and design a framework for metadata creation and remediation using AI technologies to support workflow and analysis - Review metadata standards and ensure provenance, attribution, and contextual use information are present when appropriate - Review open content and consider removing content that should not be available for AI to scrape and integrate into learning/training models

Strategy Expanded Scope and Next Steps: Build AI-ready collections and research data infrastructure by embedding computational readiness into ongoing collection management processes and decisions. Prioritize and prepare library-held content and library-supported research data for computational use — including digitized texts, images, audiovisual materials, datasets, and contextual documentation — through rights review, provenance capture, structured packaging, and governed access models that create clear pathways to institutional compute environments supporting responsible retrieval and analysis.

- 2.3. **Strategy:** Use AI to enhance accessibility and interaction with special collections and digitized archives.

Timeline	Action Items
1-6 months	Identify an AI tool and collection (or subset) to test for automated transcriptions, captions, handwriting identification, or image analysis
6-12 months	Assess the piloted tool and consider for full workflow integration

- 2.4. **New Strategy:** Treat “vendor AI features” as a governed surface, not a default benefit. Make an explicit inventory of AI add-ons in discovery layers and subscribed databases,

require preview/testing, and establish opt-out criteria (functionality, privacy telemetry, bias risks).

- 2.5. **New Strategy:** Coordinate a collective library and cultural heritage response to AI training data bot scraping, including shared technical standards, advocacy for responsible crawling practices by AI developers, and engagement with standards bodies to establish norms that protect open access infrastructure without requiring libraries to abandon openness as a default posture.

3. AI Literacy & Critical Skills

- 3.1. **Strategy:** Create dynamic, updated information and AI literacy programs tailored to address biases, misinformation, and ethical concerns.

Timeline	Action Items
1-6 months	- Document and publish updated AI literacy resources in an openly accessible format - Update or create new learning modules or curriculum specifically addressing AI tool use, citation of AI outputs, and research documentation - Create a bias evaluation framework and accompanying prompt toolkit
6-12 months	- Establish a partnership with the university writing center and academic departments to co-design AI-era learning outcomes - Review existing teaching materials and curriculum and update for relevant AI-tool integrations, AI-ethics discussions, and AI-usage guidelines
Year 2	Iterate with new technologies advancements, feedback, and reflection

- 3.2. **Strategy:** Equip users with the skills to navigate a complex AI-driven information landscape while maintaining trust in libraries as reliable sources.

Timeline	Action Items
Year 1	- Develop a modular AI literacy curriculum for multiple audiences (students, faculty, staff, and researchers) that aligns with existing campus resources - Convene a cross-functional AI literacy task force including librarians, faculty, teaching and learning units, and student affairs staff
Year 2	Launch a “library as AI quality evaluator” service offering assessments of tools for specific research use cases

Strategy Next Steps: Scale “library as evaluator” service patterns using repeatable frameworks. CMU’s Tool Assessment Framework model, combined with literacy workshops and community-of-practice mechanisms, points toward a sustainable way to help faculty/students and internal staff select tools responsibly—especially as “search shifts to answers” and agentic automation grows.

4. Ethics & Values-Based Positioning

- 4.1. **Strategy:** Support researchers and educators by offering guidance on AI ethics, data management, and rights retention.

Timeline	Action Items
1-6 months	• Document and publish updated AI guidance resources in an openly accessible format • Update or create new learning modules and workshops specifically addressing ethics, data management, copyright, and data privacy in AI environments
6-12 months	Establish a partnership with the office of research and/or the teaching and learning unit to integrate into the Responsible Conduct of Research resources and training

- 4.2. **Strategy:** Ensure AI tools and services uphold the library's core values.

Timeline	Action Items
1-3 months	• Develop a library AI ethics statement aligned with institutional values and ALA principles • Review the AI tools available at your campus • Identify and review AI tools automatically integrated into primary library databases and discovery systems
3-6 months	• Create an equity review checklist for all new AI services or tool implementations • Advocate for vendor contract language about AI that reflects library values
6-12 months	Identify AI tools to pilot for user discovery in databases and discovery systems
Year 2	• Engage students and researchers in at least one co-design or feedback process related to AI services • Publish an annual transparency report on library AI tool use, data practices, and equity outcomes

Strategy Next Steps: Define the services, collections, and user interactions where AI use is inappropriate or prohibited — *including sensitive collections, vulnerable populations*, — and communicate these policies transparently to users and institutional stakeholders.

Strategy Expanded Scope Incorporating Bold Steps: Potentially include environmental impact assessment — energy consumption, water use, and carbon

footprint — as a standard evaluation criterion in AI tool and infrastructure procurement decisions, and incorporate these considerations into library AI governance frameworks.

5. Campus Partnership & Institutional Integration

5.1. **Strategy:** Forge cross-campus partnerships with AI researchers and technologists.

Timeline	Action Items
1-6 months	• Develop a campus AI partnership strategy, identifying key offices, committees, and faculty for engagement • Identify key lead AI researchers and technologists on campus and use data management and digital storage as an entry to potential AI-related collaborations

5.2. **Strategy:** Integrate libraries into institutional AI strategies; lead campus conversations on ethical AI use, informed consent, and data privacy.

Timeline	Action Items
Year 1	• Secure a library seat on the campus AI ethics board or AI governance committee • Position library staff as embedded partners in AI-related campus initiatives
Year 2	• Lead campus initiative communication efforts through reports and/or presentations on ethical use of AI, informed consent, and data privacy • Integrate library analytics with university student success and research impact data

5.3. **New strategy:** Develop and maintain authoritative guidance on funder/journal AI disclosure requirements and embed it into grant support and researcher workflows (research admin, IRB, ORA/OSP, Graduate School, journals support), positioning the library as a compliance-enabling partner for AI-assisted scholarship.

5.4. **New strategy:** AI-enabled research integrity support embedded with RCR/Graduate School. Embed library expertise into Responsible Conduct of Research, graduate training, and departmental onboarding to operationalize: AI disclosure norms, provenance documentation, citation of AI contributions, and integrity checks as “standard lab practice.”

6. Collective Action, Advocacy & Partnerships

6.1. **Strategy:** Lead conversations on fair use, copyright, and licensing agreements that prioritize the needs of higher education and researchers.

Timeline	Action Items
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1-6 months	• Develop shared talking points for government and policy groups on relevant AI legislation and impacts for libraries, education, and research • Create/use shared template contract language for AI-related provisions
6-12 months	• Engage in federal and state policy conversations about AI regulation and academic fair use • Evaluate library services broadly for copyright trends and guidance as a result of generative AI

- 6.2. **Strategy:** Strengthen collaborations across libraries, corporate entities, and governments to develop shared standards and ethical AI applications.

Timeline	Action Items
Year 1	• Participate actively in national and international coalitions focused on AI and academic rights (CNI, ARL, or relevant coalitions focused on AI and academic rights) • Create local understanding and use of shared professional frameworks for using AI, such as the ARL “Research Libraries Guiding Principles for Artificial Intelligence”¹
Year 2	Develop shared standards defined as priorities by collaboratives

- 6.3. **New strategy:** Develop a joint advocacy agenda positioning public-interest AI infrastructure (e.g., open evaluation benchmarks, shared corpora, and equitable compute access) as essential research infrastructure—especially under de-globalization and budget compression—so research libraries are not structurally forced into tech-oligarchy dependency.

7. NEW: Facilities and Space Planning

- 7.1. **New strategy:** Redesign library spaces and programming for both AI-enabled scholarship and low/no-tech. Develop a purposeful mix of high-tech AI Studios (staffed, workshop-ready environments for guided experimentation, tool evaluation, and AI-supported workflows) and low/no-tech focus spaces (quiet, no-device zones that protect deep work and learning), positioning the library as both the campus venue for responsible AI practice and a refuge from always-on digital saturation.

¹ “Research Libraries Guiding Principles for Artificial Intelligence.” (2024, April). Association of Research Libraries. <https://doi.org/10.29242/principles.ai2024>.