innovation, efficiency & strategy
Dawson day

Ken Chad
Ken Chad Consulting Ltd
ken@kenchadconsulting.com
Te: +44 (0)7788 727 845
www.kenchadconsulting.com

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my perspective: technology driven change, library systems in their broadest sense, helping libraries to be more effective.

today I will put a stronger focus on *academic* libraries

in a period of disruptive change where should we focus our investment?

JISC

SCONUL

Library Management Systems
Investing wisely in a period of disruptive change

Briefing Paper

April 2008

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When the library business is booming why are public libraries in decline and what can we do?
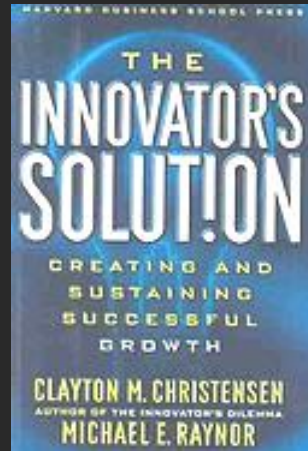By Ken Chad
25th January 2010

A response to 'Empower, Inform, Enrich. The Modernisation Review of Public Libraries. A consultation document.' DCMS. December 2009

dcms

department for culture, media and sport

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where should we focus to get the best return?

Strategic sweet spot

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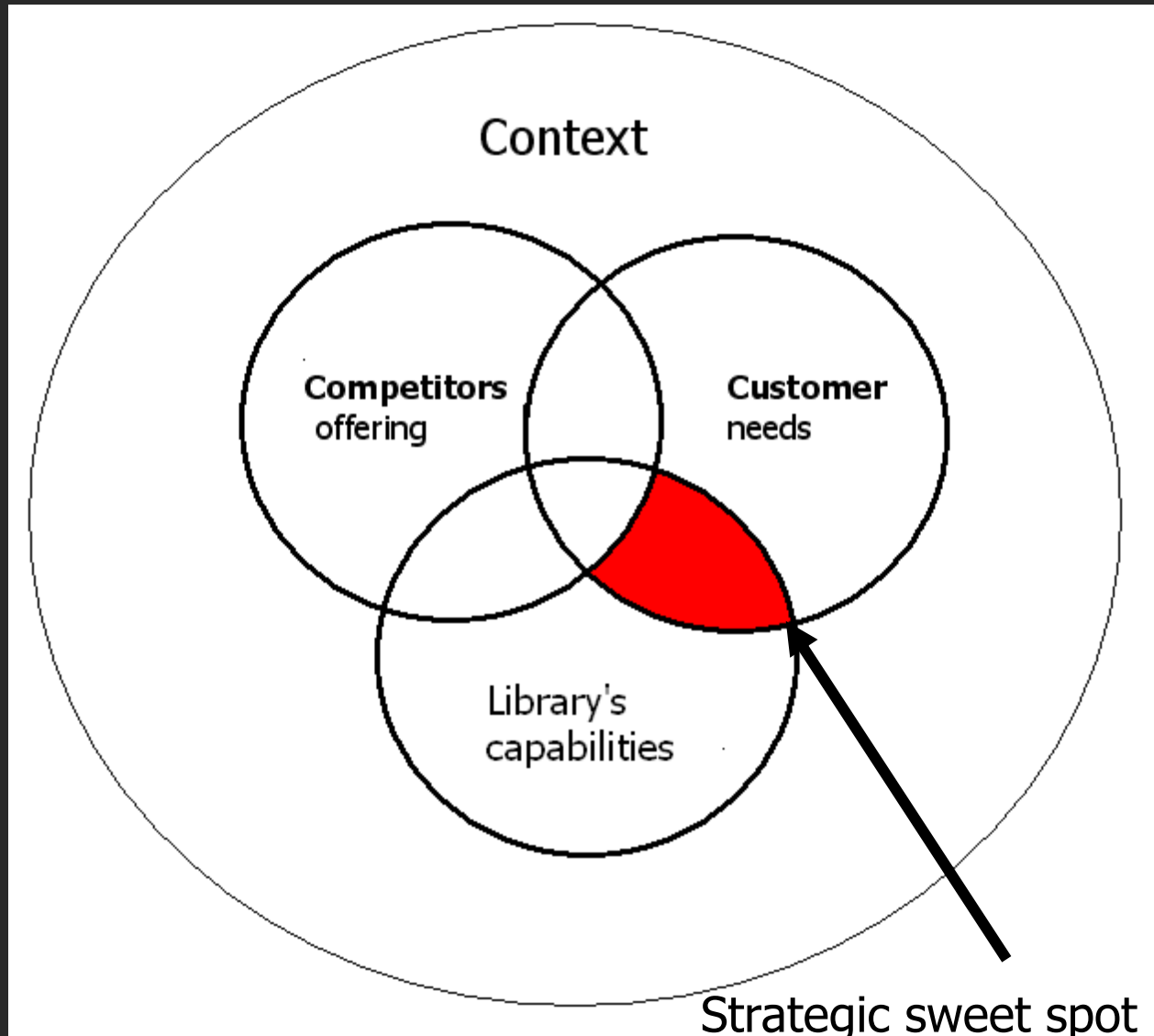
thinking about innovation.....

models of innovation
sustaining
disruptive

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sustaining innovation

- targets demanding high-end customers (that's you!)
- better performance
- incremental— year-on-year
- some innovations are breakthrough-- leapfrog-beyond-the-competition (open source LMS, hosted/cloud systems?)
- established companies/organisations/institutions almost always 'win'

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sustaining technologies

Established organizations are generally good at change that involves sustaining technologies. They know the needs of their customers and how to work with and listen to them. Service models are effective because they have been refined over long periods.

'The Innovator's Dilemma: Disruptive Change and Academic Libraries.' By David W. Lewis. Library Administration & Management 18(2):68-74 Spring 2004.

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examples of improvements and efficiencies based on 'sustaining' innovation
(

- shelf ready books
- Patron (Demand) Driven Acquisition -'PDA' (of e-books)
- new discovery services
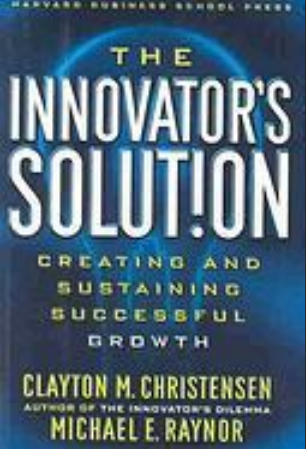
disruptive innovation

- not about better products to *established* customers
- not as good as current products
- ..but simpler, more convenient, less expensive, to *less demanding* customers
- **entrant companies organisations/institutions can 'win'**

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a disruptive product or service typically....

is '**good enough**' for low-end consumers. They don't need a 'fully featured' product

has a significant **cost advantage**

is **simpler and more convenient** to use than 'mainstream' products

disruptive technologies

Established organizations generally fail when change involves disruptive technologies, and organizations at the periphery or from different sectors most often succeed.

'The Innovator's Dilemma: Disruptive Change and Academic Libraries.' By David W. Lewis. Library Administration & Management 18(2):68-74 Spring 2004.

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disrupting universities?

'Universities are now just one source among many for ideas, knowledge and innovation. **That seems to threaten their core position and role...**'

no entrance requirements
no fees
everyone can take a course
everyone can create and revise teaching materials
anyone can participate in the learning activities
everyone can teach a course

Welcome to Wikiversity

Set learning free

with 15,854 learning resources and growing.

"On résiste à l'invasion des armées; on ne résiste pas à l'invasion des idées." -Victor Hugo (discuss)

Welcome

Wikiversity is a Wikimedia Foundation project devoted to learning resources, learning projects, and research for use in all levels, types, and styles of education from pre-school to university, including professional training and informal learning. We invite teachers, students, and researchers to join us in creating open educational resources and collaborative learning communities. To learn more, try a guided tour or start editing now.

Google Scholar BETA

amazon.com.

'..organize the world's information and make it universally accessible and useful.'

LibraryThing

delicious

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the edgeless university
why higher education must embrace technology

Peter Bradwell

DEMOS

'**Google** opens up vast resources to many more people, but at the same time it **undermines the role of universities as stores of knowledge**.'

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results of disruption…..

'In the end, libraries may be serving only a small number of …customers without any significant decline in the cost of services. **This is not a sustainable position**, and when this happens, **library services will either collapse or need to be radically restructured'**.

'The Innovator's Dilemma: Disruptive Change and Academic Libraries.' By David W. Lewis. Library Administration & Management 18(2):68-74 Spring 2004.
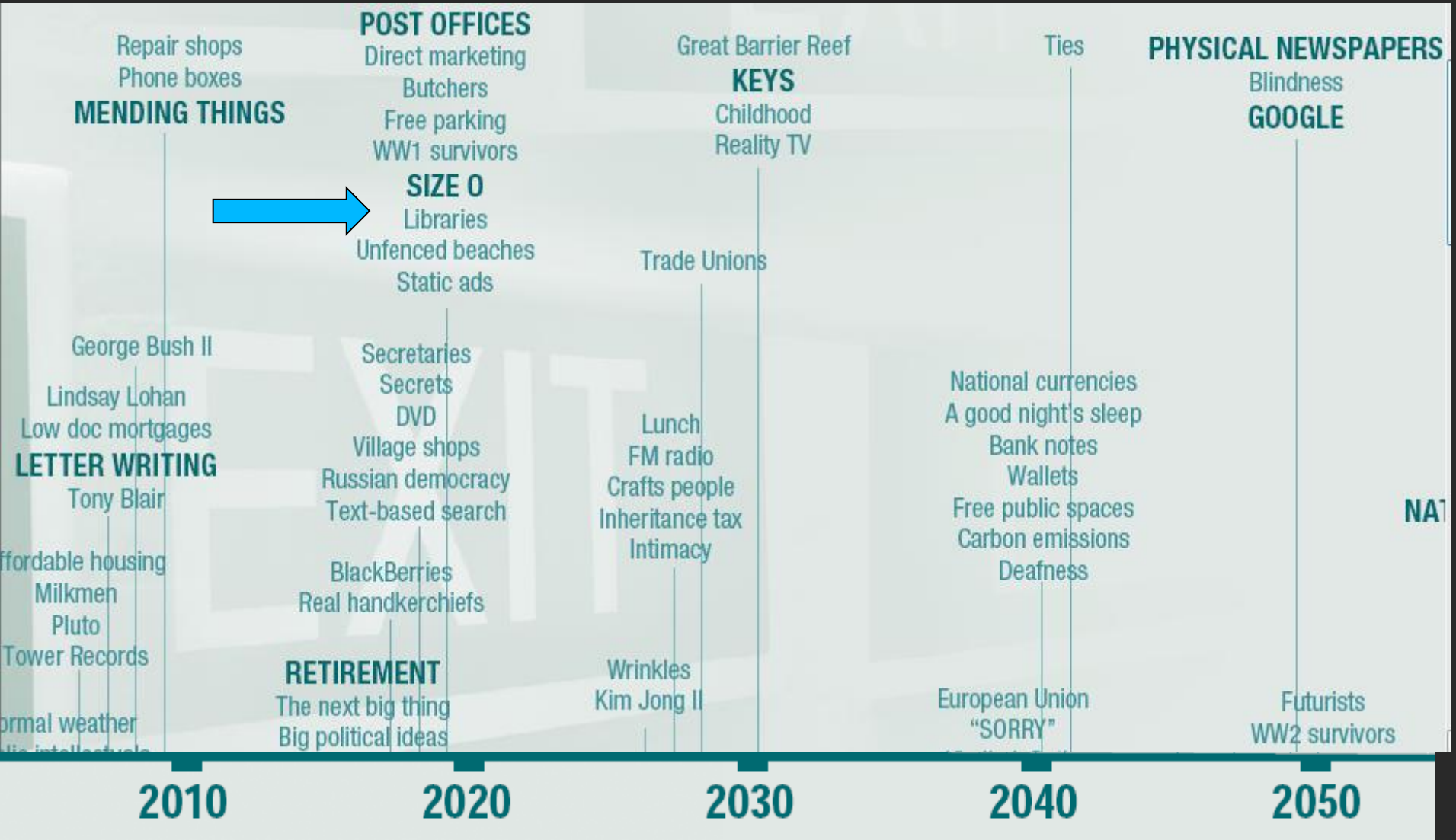
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disruption…when will it happen?

'**Change will not be instantaneous, but it will be relentless'.**

'The structures and practices of libraries will no more withstand the technological changes we are facing than the scribal culture withstood the changes brought on by the printing press'

A Model for Academic Libraries 2005 to 2025. By David W. Lewis. Paper to be presented at "Visions of Change," California State University at Sacramento, January 26, 2007

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Extinction timeline

POST OFFICES
Repair shops
Phone boxes
MENDING THINGS

Direct marketing
Butchers
Free parking
WW1 survivors
SIZE 0
Libraries
Unfenced beaches
Static ads

Great Barrier Reef
KEYS
Childhood
Reality TV

Ties

PHYSICAL NEWSPAPERS
Blindness
GOOGLE

Trade Unions

George Bush II
Lindsay Lohan
Low doc mortgages
LETTER WRITING
Tony Blair

Secretaries
Secrets
DVD
Village shops
Russian democracy
Text-based search

Lunch
FM radio
Crafts people
Inheritance tax
Intimacy

National currencies
A good night's sleep
Bank notes
Wallets
Free public spaces
Carbon emissions
Deafness

NA

ffordable housing
Milkmen
Pluto
Tower Records

BlackBerries
Real handkerchiefs

ormal weather

RETIREMENT
The next big thing
Big political ideas

Wrinkles
Kim Jong II

European Union
"SORRY"

Futurists
WW2 survivors

2010   2020   2030   2040   2050

http://www.nowandnext.com/PDF/extinction_timeline.pdf   Richard Watson: 'As usual this is partly a bit of fun so don't take it too seriously! '

is there any hope?

The **noise of information and knowledge needs filtering**; students need guidance and expertise. They also need the 'brand value' of institutions and the validation they provide. Universities have to capitalise on the connections and relationships made possible by the new information technologies.

the edgeless
university
why higher
education
must embrace
technology

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'A casual Google search may well be good enough for a daily task. But if you are a college student conducting his or her first search for peer-reviewed content, or an established scholar taking up a new line of inquiry, then the stakes are a lot higher. **The challenge for academic libraries**, caught in the seismic shift from print to electronic resources, **is to offer an experience that has the simplicity of Google**—which users expect—while searching the library's rich digital and print collections—which users need. Increasingly, they are turning to a new generation of search tools, called discovery, for help'

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or to put it another way........

"Why is Google so easy and the library so hard?"

Visualize the Perfect Search.' By Carol Tenopir. Library Journal. 1 March 2009.
http://www.libraryjournal.com/article/CA6639354.html?industryid=47130

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discovery service procurements
some recent examples
From the SCONUL Higher Education Library Technology website
http://helibtech.com/Procurements

Middlesex University - Summon 2010

Northumbria University Summon 2010

Royal Holloway - Summon 2010

Sheffield Hallam - Summon 2010

University of Huddersfield- Summon 2009

University of Leicester - Summon 2010

University of London Research Library
Services - Summon 2009

University of Surrey - Summon 2010

University of Wolverhampton - Summon 2010

Abertay Dundee - Summon 2010

Glasgow Caledonian- Summon 2010

National Library of Scotland - Summon 2010

University of Dundee- Summon 2009

University of Edinburgh- Summon 2010

National library of Wales- Summon 2010

Imperial College London -Primo—Nov 2010

University of Nottingham - Primo—Nov 2010

Loughborough University - Primo—Nov 2010

University of Manchester - Primo—Nov 2010

The University of Sheffield -Primo—Nov 2010

Queens University -Encore March 2011)

University of Kingston Primo April 2011

UCL Primo April 2011

University of Salford Primo April 2011

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if we've invested to make resource discovery more *effective* can we made resource management more *efficient*?

how can we reduce resource management costs?

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do you know how much it costs to manage your resources?

Costs (large UK research library)	Hardware	Software	Staff	Total annual cost for each 'system'
Print management (LMS)	£8,500	£158,000	£141,500	£300,000
E-resources management		£22,00	£70,500	£92,500
Institutional Repository	£22,500	£56,000	£202,500	£281,000

strategic approaches to reducing costs

resource management efficiencies - - move to 'e'

'There are clear savings as fewer paper items are processed ... But I suspect that **few libraries have clear strategies** as to how to manage this migration and how and when they will reclaim resources. Nor do many libraries seem to be in a hurry to do so'.

A Model for Academic Libraries 2005 to 2025. By David W. Lewis. Paper to be presented at "Visions of Change," California State University at Sacramento, January 26, 2007

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sharing

open data

'Open data provides a platform on which innovation and value generation can flourish. If governments publish their data and get out of the way, the applications that people want will emerge'

'Open for Business' By Nigel Shadboldt. Open Knowledge Foundation Blog. 3rd April 2011 http://blog.okfn.org/2011/04/03/open-for-business/

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'Open data can reduce integration costs, improve transparency and harness the innovation of others.

If you release your data then others will develop applications that make best use of it – providing new services that benefit you directly, like all of those free travel apps that the travel companies didn't have to write, but which nevertheless drive people onto the transportation network'.

'Open for Business' By Nigel Shadboldt. Open Knowledge Foundation Blog. 3rd April 2011
http://blog.okfn.org/2011/04/03/open-for-business/

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Welcome to Discovery

discovery A metadata ecology for UK education & research

Towards a thriving metadata ecosystem

In 2010, the JISC and RLUK Resource Discovery Taskforce (RDTF) worked with stakeholders from the libraries, archives and museums to set out a Vision for making the most of our resources by effectively positioning their metadata for discovery and reuse within the global information ecosystem.

Our aim is that **Discovery** will help to mobilise and energise the community, engaging stakeholders to create a critical mass of open and reusable data, and explore what open data makes possible through real-world exemplars and case studies.

Research Information

LIBRARY NEWS

Elsevier launches competition to develop library apps

18 May 2011

Elsevier has launched a competition to encourage librarians and information professionals to come up with solutions to the challenges that they and their patrons face in the search and discovery of information.

Selected app concepts in the SciVerse Applications Apps for Library Idea Challenge will be posted on the challenge website and open to commentary

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'letting the data go enables **value to be built at scale'**

'Open for Business' By Nigel Shadboldt. Open Knowledge Foundation Blog. 3rd April 2011 http://blog.okfn.org/2011/04/03/open-for-business/

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Web-Scale

The Web is all about scale, finding ways to attract the most users for centralized resources, spreading those costs over larger and larger audiences as the technology gets more and more capable.

Chris Anderson

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scaling-up

.. The Ohio Library and Information Network, OhioLINK, is **a consortium of 88 Ohio college and university libraries, and the State Library of Ohio**, that work together to provide Ohio students, faculty and researchers with the information they need for teaching and research. Serving more than 600,000 students, faculty, and staff at 89 institutions, OhioLINK's membership includes 16 public/research universities, 23 community/technical colleges, 49 private colleges and the State Library of Ohio.

scaling-up

'A blueprint for sharing services: Civica SELMS consortium reshapes library services for five million people in SE England

Civica is helping to transform library services as well as creating a template for sharing of other departmental services through the South East Library Management (SELMS) consortium which has now expanded to **eleven member authorities providing services to over five million people.'**

http://www.civicaplc.com/UK/News/Press/SELMS+Civica+press+release.htm

scaling-up: data

Moving appropriate data to a network level data ....is a first step in re-engineering library systems [which] have created silos of data, often locked inside proprietary systems and databases.

It is important for libraries to own and control their data resources; to be free to share them, provide access to them and to expose the data. It is less important that the libraries own or run the software that manipulates and manages the data.

'The Networked Library Service Layer: Sharing Data for More Effective Management and Co-operation'. By Janifer Gatenby. 30-July-2008 Publication: Ariadne Issue 56
http://www.ariadne.ac.uk/issue56/gatenby/

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scaling-up
re-engineering library systems

Collection Acquisition and Management at the Network Level

As library collections are increasingly shared, there may be significant advantages (in terms of both cost and efficiency) in **moving more acquisitions and licensing data and processes to the network level where they can be shared** among the ILS, ERM and repositories and with other libraries. Moreover, libraries are finding their ILS acquisitions modules inadequate for managing the acquisition of the newer parts of whole collections. There is already a clear need for the acquisitions of the three parts of the collection to be managed as a whole; moving data to the network, thereby enabling shared network services, is one solution.

'The Networked Library Service Layer: Sharing Data for More Effective Management and Co-operation'. By Janifer Gatenby. 30-July-2008 Publication: Ariadne Issue 56
http://www.ariadne.ac.uk/issue56/gatenby/

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scaling-up
re-engineering library systems

Shared Service(s) for Electronic Resources Management (ERM)

'This project is helping to understand how 'above campus' (consortium or national) electronic resource management might benefit university libraries and what functions such a shared service might encompass. '

http://helibtech.com/SCONUL_Shared_Services

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Sheffield University

'The University Library is seeking to procure a unified library management system '

'work in concert with a vendor and other interested research library stakeholders to contribute towards the design, development and delivery of a next generation library system which will produce a **unified resource management approach to the full spectrum of library collections.'**

And

'The University Library has a **strategic preference and a clear business requirement for a born cloud based system**. The library places the utmost importance on the architecture for any new system being modern, fit for purpose & designed specifically to operate within a cloud environment'.
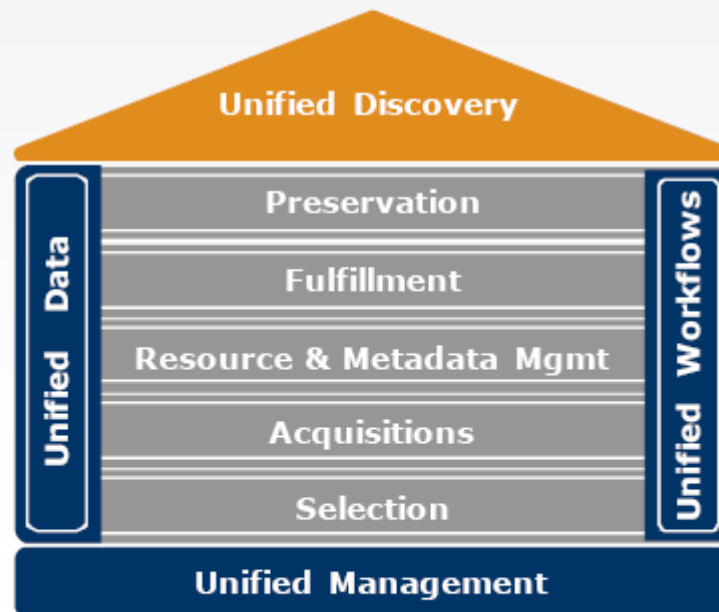
http://www.publictenders.net/tender/103132

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scaling-up
re-engineering library systems

Consolidate the Frameworks

Turn format-based **vertical silos**
to service-based **horizontal workflows**

Unified Discovery

Unified Data | Preservation | Unified Workflows
Fulfillment
Resource & Metadata Mgmt
Acquisitions
Selection

Unified Management

ExLibris

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making savings?

'If it eventually delivers what it promises, full implementation of Alma should deliver **staggering cost savings; "50 per cent of the total cost of ownership"** according to Jo Rademakers of the Catholic University of Leuven'

'Streamlining workflow—cutting costs' By Elspeth Hyams CILIP Update May 2010
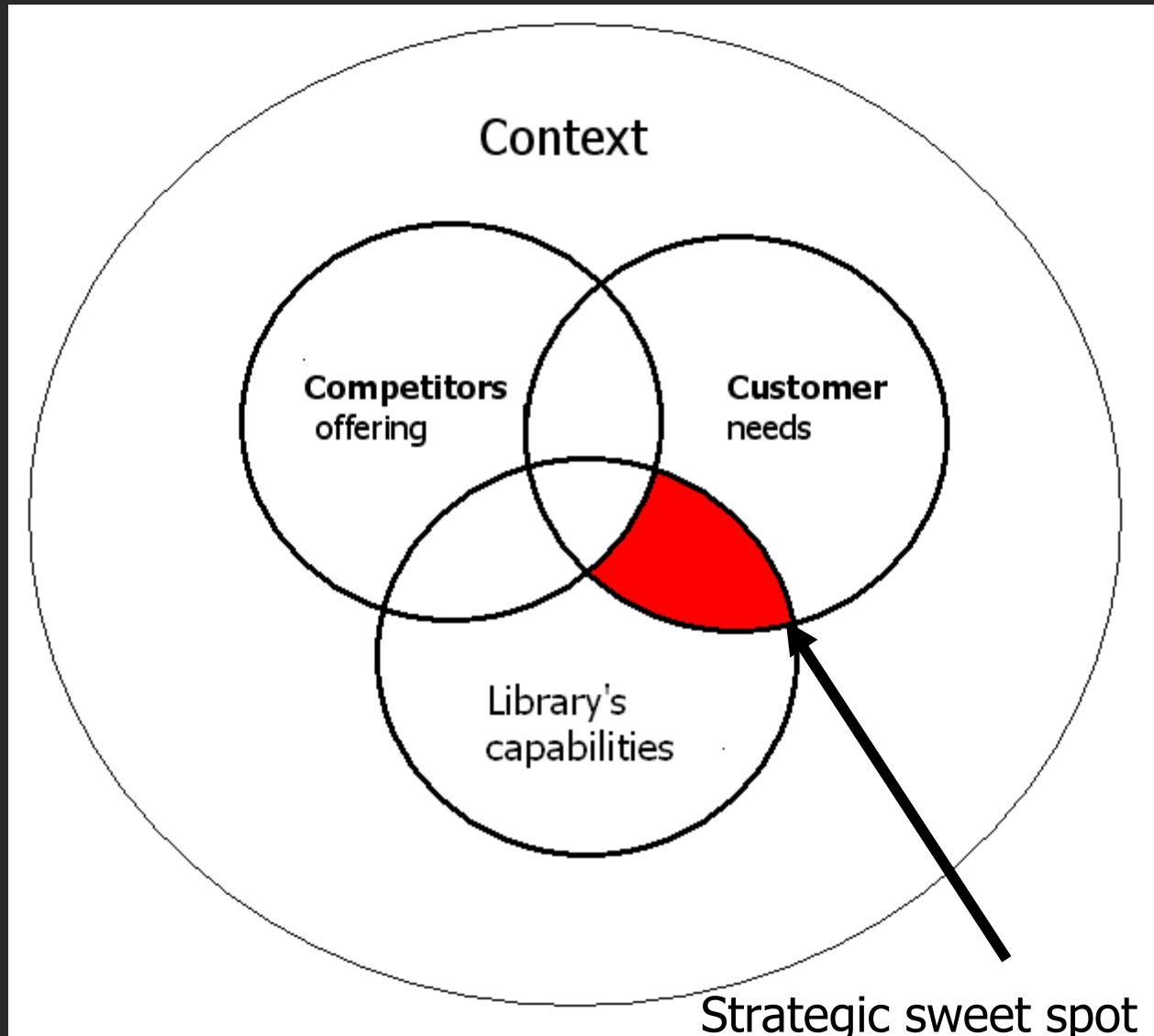
Subscriptions: £90 (UK); £98 (World); $195 (N. America)   June 2010
LIBRARY&INFORMATION
UPDATE
The essential briefing for the sector · www.cilip.org.uk/update

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So can all this be woven into a strategy?

Strategic sweet spot

themes for a strategy?

1. Complete the **migration from print to electronic** collections and capture the efficiencies made possible by this change.

2. **Retire legacy print** collections in a way that efficiently provides for its long term preservation and makes access to this material available when required. This will free space that can be repurposed.

3. **Redevelop the library as the primary informal learning space** on the campus. In the process partnerships with other campus units that support research, teaching, and learning should be developed.

4. **Reposition library and information tools**, resources, and expertise so it is embedded into the teaching, learning, and research enterprises. .....Emphasis should be placed on external, not library-centered, structures and systems.

5. Migrate the focus of collections from purchasing materials to **curating content.**

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to formulate a great strategy
is not easy and takes time and effort

you need to....

understand the context

understand the competition

understand your customers needs

strategy is *NOT...*

vision : where we want to be -- an indeterminate future goal

mission: why the organization exists -- the motivation for being in the business

values : what we believe in and how we will behave

34% of projects..were not aligned with..strategy

'Why your IT project may be riskier than you think.'

By Bent Flyvbjerg & Alexander Budzier. Harvard Business Review. September 2011
Citing: 'The art of project portfolio management.' By Sascha Meskendahl, Daniel Jonas, Alexander Kock and Hans Georg Gemunden
http://mpm.tim.tu-berlin.de/fileadmin/docs/MPM-Artikel.pdf

Harvard Business Review
EMBRACING COMPLEXITY

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elements of strategy

objective

the single precise objective that will drive the organisation over the next 3-5 years or so
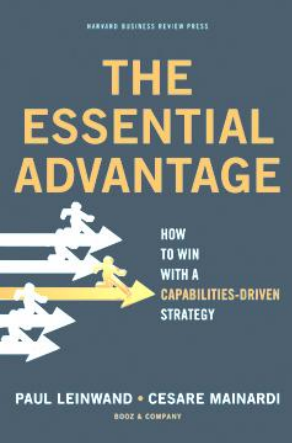
scope

what products/services ? who are your customers? in some sense this can be most helpfully understood by identifying what the organisation will *not* do: what needs it will *not* address

advantage

this is the most critical aspect in developing an effective strategy statement. it means really understanding the value that the organisation brings to the customer

Adapted from: 'Can you say what your strategy is'. By David J Collis and Michael G Rukstad. Harvard Business Review. April 2008

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at the heart of this is the issue of
value

why should people use *our* services instead of alternatives?

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a capabilities approach

what are the three to six capabilities that describe what we do uniquely better than anyone else?

can everyone in the organization articulate our differentiating capabilities?

is our leadership reinforcing these capabilities?

'The essential advantage. How to win with a capabilities driven strategy' Paul Leinwand and Cesare Mianardi. Harvard Business Review Press. 2011

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Ken Chad
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ken@kenchadconsulting.com
Te: +44 (0)7788 727 845
www.kenchadconsulting.com

kenchadconsulting