Library infrastructure: value for money?

Jisc Library System Programme Workshop
15th July 2013

Ken Chad

Ken Chad Consulting Ltd

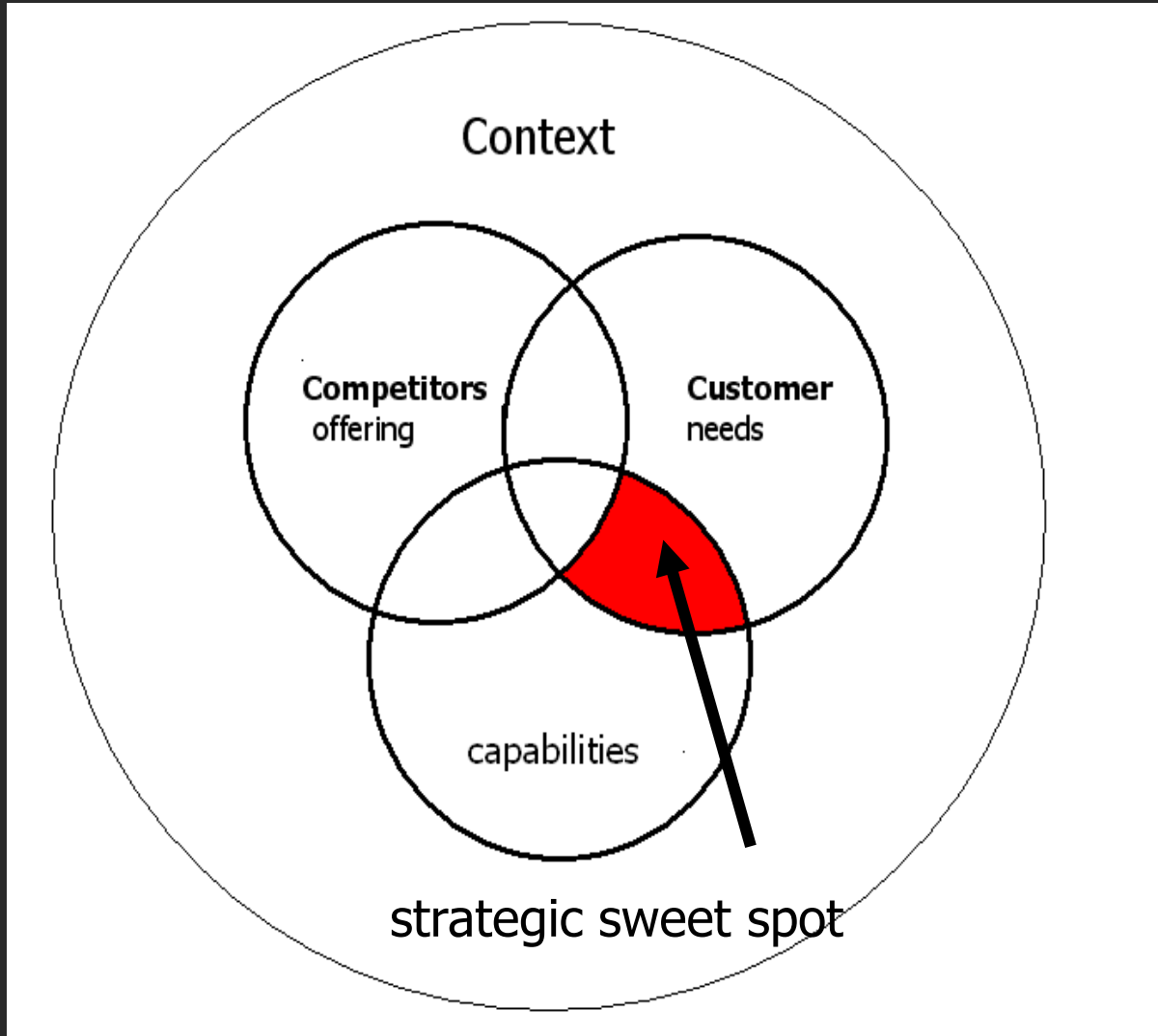Twitter @kenchad
ken@kenchadconsulting.com
Tel: +44 (0)7788 727 845
www.kenchadconsulting.com

kenchadconsulting

where is the best value? where is it best to focus our efforts?

Context

Competitors offering

Customer needs

capabilities

strategic sweet spot

kenchadconsulting

is what you do aligned to strategy?

(if it isn't what value does it have?)

'strategy…a **cohesive response** to an important challenge…. '

'Good Strategy/Bad Strategy: The difference and why it matters'. Richard Rumelt . Profile Books 2011

kenchadconsulting

what is the business case for change?
can we get better value?

it's a complicated 'ecosystem'
a real life academic library example. Not even a Library Services Platform does all this.....

Sharon Penfold
v2, 04/07/12

kenchadconsulting
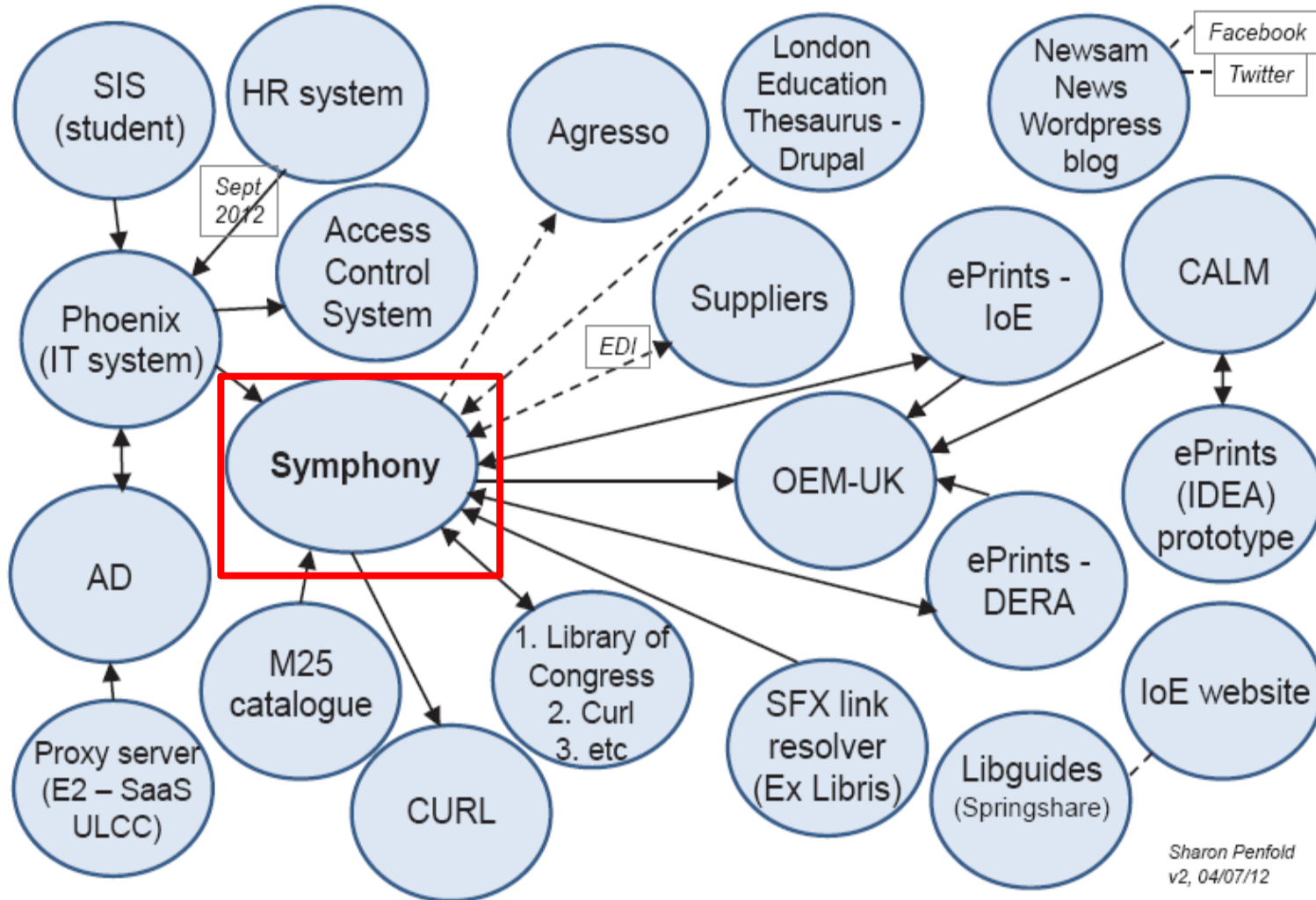
system costs: (research library)
more than you think if you include staff?

Library Systems	Annual Costs			
	Hardware	Software	Staff	Total
Print management-LMS	£8,500	£120,000	£132,000	£260,500
E-resources management		£22,000	£71,000	£93,000
Other: Discovery, Reading lists, IR, digitisation, archives & special collections	£26,000	£114,500	£270,000	£410,500
Total for library systems	**£34,500**	**£256,500**	**£473,000**	**£764,000**

Adapted and averaged from work done by Ken Chad with a number of libraries

# what's the value of the collection(s) being managed?

(how much is you collection insured for? Is that the value?)

what needs to be done?

'Untangling the library systems environment'
Lorcan Dempsey (OCLC)

'..on the management side libraries have to pull together a variety of systems and services whose legacy business and technical boundaries may no longer map very well onto user requirements.

'Untangling the library systems environment'. By Lorcan Dempsey. Lorcan Dempsey's Weblog 25 Oct 2009. http://orweblog.oclc.org/archives/002015.html
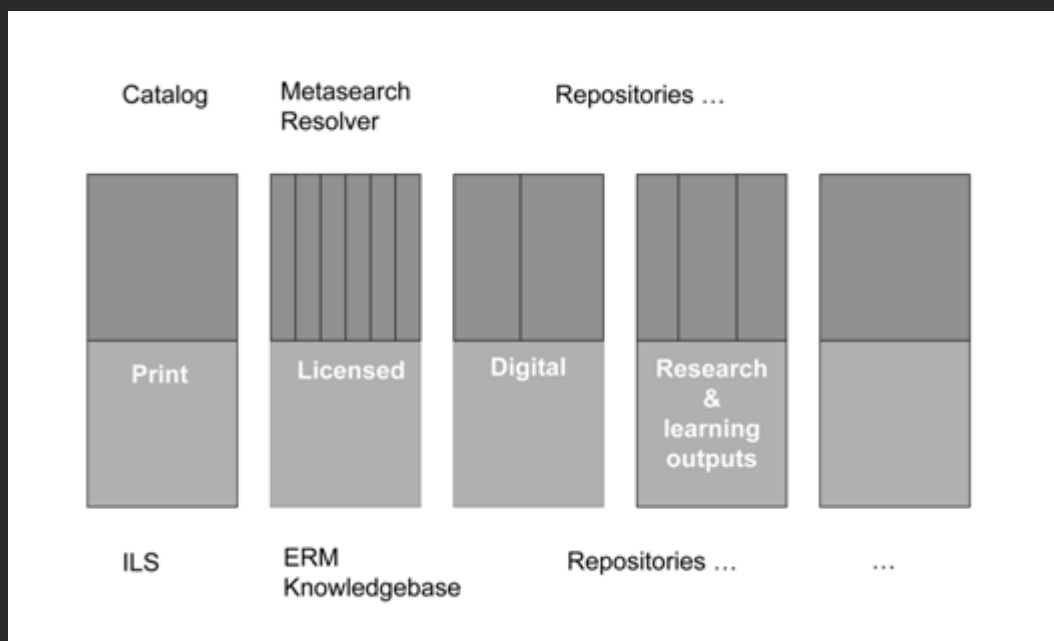
Librarian –now consultant (Marshall Breeding)

"These systems aren't as integrated or comprehensive anymore as **it takes maybe eight or nine or ten different applications … to do the things that libraries do**."

"With the increasing dominance of electronic content and digital collections in academic libraries, the **capabilities lacking in the current slate of automation systems has increasingly become an obstacle to progress.**

kenchadconsulting

a view from librarians

(from Princeton University Libraries, and The College of New Jersey) Library,

"On the resource side…..electronic resources are fast outpacing physical materials to become the dominant library resources

.. the library automation system, also called the integrated library system (ILS), has not changed much for the past two decades. It finds itself uneasily handling the ever-changing library environment and workflow. **Library staff becomes ever more frustrated with the ILS, noting its inadequacy in dealing with their daily jobs.**

It is obvious that **we are at the tipping point for a dramatic change in the area of library automation systems."**

The Next Generation Integrated Library System: A Promise Fulfilled? By Yongming Wang and Trevor A. Dawes. Information Technology and Libraries. September 2012
http://napoleon.bc.edu/ojs/index.php/ital/article/viewFile/1914/pdf

kenchadconsulting

a view from a librarian
will a new library services platform deliver value?

'If it eventually delivers what it promises, full implementation … 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

kenchadconsulting

a *university* perspective?

Universities will continue to increase efficiency and develop innovative ways of operating

The most promising areas of reform, aside from improving procurement practice, include **process improvement**, more effective estates management, increased **collaboration** and **asset sharing**, developing **shared services**, and identifying **innovations in teaching and academic practice.**

Universities UK submission to the 2013 Spending Round

http://www.universitiesuk.ac.uk/highereducation/Documents/2013/UUKsubmissionToThe2013SpendingRound.pdf#page=1&zoom=auto,0,202

kenchadconsulting

what do *vendors* think the biz case is?

a vendor's (ExLibris)view

unify the disparate systems today's libraries manage for electronic, digital, and print resources

optimize workflows through shared data and collaborative services as well as a cloud-based infrastructure

deliver **improved analytics** that tie the value of the library and its services more closely to important institutional outcomes

expansion of metadata management and curation beyond traditional content to include research data sets; and support for joint collection development models that allow libraries to truly collaborate and thereby maximize the investment in their collections

ExLibris Alma

kenchadconsulting

a vendor's (ExLibris) view

shared metadata into the resource management environment

unified workflows and analytics capabilities to streamline and optimize fulfillment workflows

increase the return on investment and **reduce the total cost of ownership** of the library's infrastructure

maximize your collection development budget with selection, acquisitions, and evaluation processes informed by usage information, cost per use, and the holdings of peer collections.

integrated seamlessly with other systems including external campus system

kenchadconsulting

a vendor's (Innovative) view

INTEGRATED RESOURCE MANAGEMENT AND E-WORKFLOW

- Care for both physical and electronic resources through integrated management approach
- By centralizing and assimilating all of the technical and administrative details of digital resources, Sierra saves staff time, improves collection analysis, and makes the most of scarce budgetary resources
- Sierra makes it easy for patrons to find the e-resources they need, elegantly presenting important information such as renewal dates, authentication, proxy data, and complete content descriptions
- E-workflow is optimized for electronic resources – and can be adapted to new electronic resource types as they arise and are integrated into libraries

Innovative

kenchadconsulting

a vendor's (Serial Solutions) view

Shared Data Model
Metadata is maintained within KnowledgeWorks. We'll maintain it for you, saving you time and improving the accuracy of the information that powers your library.

Built-in Interoperability
interact with external systems such as finance, suppliers, and discovery services. By more tightly connecting all library activity, efficiencies are created, information is shared, and costs are reduced.

Redefined Workflows
Utilizing brand-new workflows designed in partnership with libraries to meet the reality of today's library operations. Streamlined workflows mean greater productivity, allowing resources to be reallocated to high- priority activities.

Lower Total Cost of Ownership
A true Software as a Service (SaaS) offering that provides cost savings at multiple levels. With no hardware or software to maintain, it eliminates the need for costly IT resources and expertise.

Enhanced Reporting
Measurement required by libraries today goes far beyond simple usage numbers. Our web-scale management solution maintains highly accurate information within one system that can be shared and enhanced via interaction with other library and campus systems, creating information that can be used for decision-making, performance evaluation, and alignment with the greater institution mission.

Adapted from http://www.serialssolutions.com/en/services/intota/benefits

kenchadconsulting

a vendor's (Capita) view

The key benefits of Chorus :

Reduced total cost of ownership

Eliminates need for onsite hardware and maintenance overheads

Frees staff from routine maintenance and administration to be redeployed to more high-priority tasks

Improves security and accuracy of your data with remote hosting on Capita's servers

Ensures you and your staff are using most up-to-date software with regular feeds of new features administered by Capita

http://www.capita-softwareandmanagedservices.co.uk/software/Pages/libraries-chorus.aspx

kenchadconsulting

a vendor's (Kuali OLE) view

Built, owned, governed by the academic and research library community

Supports the wide range of resources and formats of scholarly information

Interoperates & integrates with other enterprise and network-based systems

Supports federation across projects, partners, consortia, and institutions

Provides workflow design & management capabilities

Provides information management capabilities to non-library efforts

http://www.kuali.org/ole

kenchadconsulting

what are the characteristics of the solutions from vendors?

a new generation of systems......

"With the increasing dominance of electronic content and digital collections in academic libraries, the capabilities lacking in the current slate of automation systems has increasingly become an obstacle to progress. **A new generation of digital services platforms for libraries is emerging,** designed to provide a more comprehensive approach to the management and access to all formats of library materials: print, electronic and digital".

'Current and future trends in information technologies for information units'. By Breeding, Marshall. El profesional de la información, 2011, v. 21, n. 1, pp. 9-15. http://www.elprofesionaldelainformacion.com/breeding-english.pdf

kenchadconsulting

'next generation' systems

HELibTech defines the characteristic of the new generation of library systems as follows:
(http://helibtech.com/Next+Generation)

Search and discovery (Discovery services) for end users is 'de-coupled' from 'back-end' resource management although some Library Service Platforms may only work with a singe discovery service (e.g. Alma will only work with Primo)

The **management of print and electronic (digital) resources is integrated (or 'unified')**

The library system **elements interoperate** easily with other systems. This is facilitated by a (web-based) Service Oriented Architecture (SOA) model to allow easier, lower cost integration with 'admin' systems such as student registry and finance. This can be viewed as a move from a library system to what has been called a 'library services platform' approach where various components and sub systems are 'loosely coupled' (SOA) to provide an overall solution

Related to the above is more attention to **improved workflow**s leading to saving in staff effort and consequently **lower cost of ownership**

'next generation' systems

HELibTech defines the characteristic of the new generation of library systems as follows: http://helibtech.com/Next+Generation)

Systems are typically 'cloud' based. This is a move away from more conventional 'hosting' to a system that is, in effect, a single entity that is shared by many separate and distinct libraries. Such 'multi-tenant' systems offer economies of scale and the opportunity to better share data (bibliographic, data on suppliers, licences etc.) across the libraries

Related to the above is **a move from 'management information' to 'analytics' or 'business intelligence'.** This is characterised by not simply providing statistics on transactions recorded by a single library system (number of loans, items catalogued, orders placed etc), to an approach where all activity (including clickstreams) is potentially recorded and might be analysed to deliver new business insights. A cloud environment offers opportunities to collect and analyse data and detect trends across, what is in effect, a global network of systems

a new generation of solutions: 'sometimes you just have to start over'

'Systems that follow this approach include WorldShare Management Services by OCLC, Alma by Ex Libris, and Intota by Serials Solutions. The shared view of these organizations incorporates a line of thinking that says the amount of change we've seen, both in computer technology and in library management/operations, is so substantial that **the best way to accommodate the change is to start with a fresh design** that can take advantage of all of these changes.

The negative aspect of this approach is that **some functionality may be lacking in early releases of the product.** Whether this approach is for you really depends on your library's needs and where the development organization is focusing first.'

'The Future of Library Systems: Library Services Platforms'. By Carl Grant. NISO. Information Standards Quarterly. Fall 2012. Vol 24 Issue 4 ISSN 1041-0031
http://www.niso.org/apps/group_public/download.php/9922/FE_Grant_Future_Library_Systems_%20isqv24no4.pdf

kenchadconsulting

approaches to the problem
Some models/tools to help
(from the 'synthesis' project)

Library systems support and guidance

Business Benefits Ranking

Problem Addressed

Making a business case for any level of change will almost certainly be complex, not least because of the variety of hard and soft measures that may be used and, where needed, the difficulty of obtaining empirical benefits / outcomes data. In the everyday world of considering change and new options, managers need a 'quick and dirty' approach to organizing gut feelings and intuitive projections into a format that can be readily sense-checked and shared to gather feedback from colleagues and even from potential suppliers.

Method Proposed

This method could be used as a concentrated group exercise, but it may be valuable to use it initially as a personal focus for building up and reflecting on a benefits list relating to proposed change. The key is to adopt a simple framework to categorize the benefits that may arise from a particular change – such as a new system (e.g. procuring a new LMS or joining a shared service) or a re-engineered process (e.g. Borrower, loan and fine categories):

A toolbox of things to help…..

Methods Toolbox

HOME   ABOUT LMS CHANGE   SITEMAP   THE CHANGE CHALLENGE

- Function Palette
- Shared Services Spectrum
- Profiles, Scenarios & User Stories
- Business Ownership Map
- Service Location Map
- Requirement v. Resource Matrix
- Business Benefits Ranking
- Dependencies Matrix
- Potential Risk Register
- Cross-functional Process Map
- Workflow diagram

CHECKLISTS

About the Checklists
Global Ecosystem Checklist
Institution Checklist
Library Service Checklist

LANDSCAPE
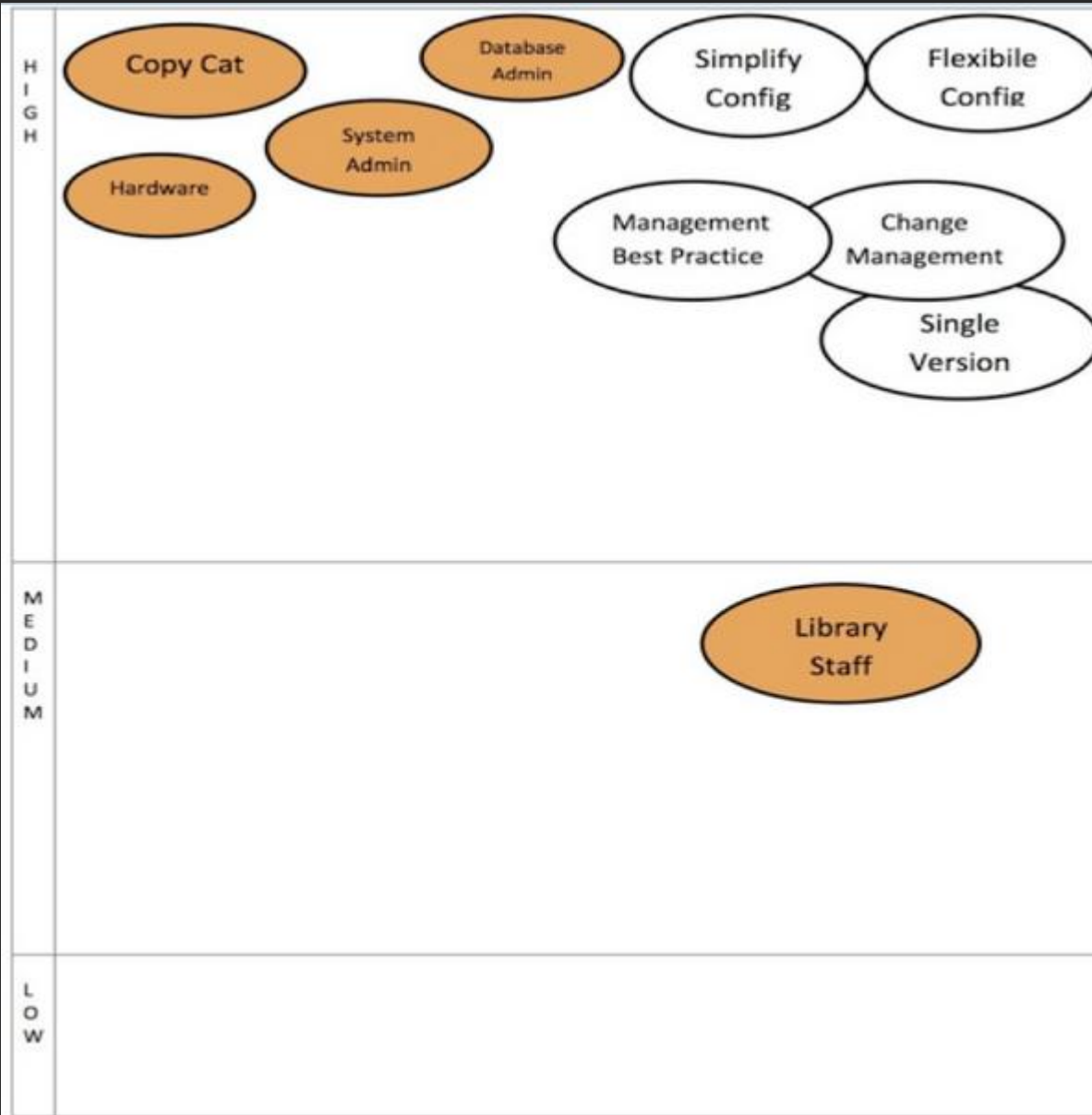
http://lmsguidance.jiscinvolve.org/wp/methods-toolbox/

....a new generation of solutions: 'sometimes you just have to start over'

Does this fit into the business case? If this is true of (some of) the vendors is it also true of libraries? Can you 'start over'?

Library infrastructure: value for money?

Jisc Library System Programme Workshop
15th July 2013

Ken Chad

Ken Chad Consulting Ltd

Twitter @kenchad
ken@kenchadconsulting.com
Tel: +44 (0)7788 727 845
www.kenchadconsulting.com

kenchadconsulting