

Library management system to library services platform. Resource management for libraries: a new perspective

**Higher Education
Library Technology**

www.helibtech.com

Ken Chad

Ken Chad Consulting Ltd

Twitter @kenchad

ken@kenchadconsulting.com

Tel: +44 (0)7788 727 845

www.kenchadconsulting.com

Higher Education Library Technology

Briefing paper

Library management system to library services platform.

Resource management for libraries: a new perspective

DOI: 10.13140/RG.2.1.4315.3128

Ken Chad, Ken Chad Consulting Ltd. August 2015

(ORCID ID: orcid.org/0000-0001-5502-6898)

This is the first Higher Education Library Technology briefing paper. HELibTech¹ is a free and open community resource which aims to provide a starting point for anyone interested library technology in Higher Education. This paper was supported by sponsorship from ExLibris Group,² a provider of library automation solutions. The author is a consultant who takes an independent and impartial view of the issues.

A market shift?

What different about a LSP?

How do the vendors stack up?

Do libraries want a LSP?

LSP –the new market reality?

Trends

Do you need a LSP?

What are the problems to be solved?

Why all this fuss about the cloud?

Meeting strategic needs

Futures directions

A market shift?



2008: “Now is not the time for new LMS procurements”



2012: “It is obvious that we are at the tipping point for a dramatic change in the area of library automation systems”



2015: 15% of UK Higher education Institutions have already decided to move to a library services platform

Library management system to library services platform. Resource management for libraries: a new perspective. HELibTech Briefing paper. Ken Chad HELibTech August 2015. DOI: 10.13140/RG.2.1.4315.3128

Market shift: A change in terminology

2008: (LMS/ILS) - Library Management System/Integrated Library system

“if you ask a librarian what library management system they use, they will often reply by naming a system that has the functionality and workflows that would be familiar to a librarian working twenty or thirty years ago”

(Library management system to library services platform. Resource management for libraries: a new perspective. HELibTech Briefing paper. Ken Chad HELibTech August 2015. DOI: 10.13140/RG.2.1.4315.3128)

2015: LSP - Library Services Platform

“I [Marshall Breeding] coined the term library services platform in 2011 to describe a new set of products that were being developed that promised to take a much different approach to library resource management than the incumbent integrated library systems.”

(Library Services Platforms: A Maturing Genre of Products. Marshall Breeding ALA TechSource. May 2015)

So what's different about a LSP?

Management of print and e-resources

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

Improved –more integrated- workflows

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

Interoperability

The library system elements interoperate easily with other (external) systems. This is facilitated where overall architecture of the system is based around 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

<http://helibtech.com/Next+Generation>

So what's different about a LSP?

'Decoupled' discovery

Search and discovery (Discovery services) for end users is 'de-coupled' from 'back-end' resource management although some Library Service Platforms (LSP) may only work with a single discovery service or may certainly have a 'preference' for one (typically the one from the vendor that provides the LSP)

Cloud based

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 organisations that share the system

Analytics

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.

<http://helibtech.com/Next+Generation>

How do the vendors stack up in terms of LSP characteristics?

Characteristic	ProQuest /ExLibris	Innovative	SirsiDynix	Capita	Koha	Kuali	OCLC
Integrated Print & E workflows	*****	***	*	*	*	**	***
Interoperability (SOA/APIs)	****	**	***	***	***	***	****
Decoupled discovery	**	****	****	****	*****	*****	***
Hosted	*****	*****	*****	*****	*****	*****	*****
Multi-tenant Cloud	*****						*****
Analytics	****	***	***	***	***	***	****

How would you score them?

What do libraries want?

University of Leicester

"The University Library is seeking to adopt a **Library Services Platform** which will support a **mixed print and electronic** information economy, effectively manage its electronic resources including meta-data and licenses and ensure quality of service provision to the Library's users.

The Library is seeking to adopt a Library Services Platform that is offered by the vendor as a **Software as a Service**. In doing so the key aim is to create more **efficient processes and work-flows**, and by making these efficiencies ensure services are delivered in a seamless, timely and effective manner and **further improve ease of use and accessibility to information for Library users**.

The University of Sussex

The University of Sussex is seeking tenders for a **new web-based Library Management System**. We are looking for a system that will provide a **unified resource management** approach to the full range of library services, and in particular to the management of online and print collections. We would expect a system to communicate as seamlessly as possible with other systems in the Library and provide excellent **integration with current and future internal and external University systems** such as our finance system, Agresso.

University of Northampton

The University requires that the new LMS exhibits what are now termed and accepted in the HE Library sector as **'Next Generation' characteristics**. These include:

- 1 A service that is **'managed remotely'** – all support, maintenance and upgrades are included as part of the contract.
2. **Unified Resource Management** – both digital and physical resources are managed within the system to reflect contemporary practices and operational efficiencies.
3. The LMS should offer **improved staff work-flows** that create genuine efficiencies for staff users across the board.
4. The LMS should exhibit a high degree of **inter-operability with other software products** that are essential for the management of students within the University environment e.g. student records system.
5. The LMS should automatically offer **analytic data as an adjunct to more efficient business practices**, both at a day-to-day working level, and a strategic level.

The University of the Arts London (UAL)

is seeking to appoint a capable supplier for the provision and implementation of a Library Management System; and not in addition a Discovery product, to keep future options opens in this fast developing market.

the solution will be procured as Software-as-a-Service (“SaaS”) to be hosted in a Cloud environment supported by the appointed Contractor, with the capability to manage the following functions:

- bibliographic information;
- catalogue and end user services;
- circulation control;
- RFID self-service;
- acquisitions;
- serials;
- inter-library loans; and
- Provide good management information.

What are libraries buying? LSP –the new market reality?

Library Management Systems/Library Services Platforms Wins & Losses (sii)

(Integrated Library Systems - ILS- in US parlance -includes so called 'next generation' [Library Services Platforms](#)).

At June 2015 around 15% of HE institutions had already decided to move to cloud based Library Services Platforms in on the [Systems Review](#) page

University	New system Vendor	Date selected (approx)	Old system vendor
Cumbria	ExLibris	September 2015	Capita
Guildhall School of Music and Drama	SirsiDynix	July 2015	SirsiDynix
Brunel University	SirsiDynix	July 2015	SirsiDynix
Royal Holloway University London	ExLibris	July 2015	ExLibris
Dundee	ExLibris	June 2015	ExLibris
Leicester	ExLibris	April 2015	SirsiDynix
Sheffield Hallam	ExLibris	April 2015	Innovative Interfaces
Buckinghamshire New University	SirsiDynix	March 2015	SirsiDynix
Surrey	ExLibris	March 2015	Capita
Edinburgh	ExLibris	March 2015	ExLibris (Voyager)
University of the Arts, London	PTFS (Koha Open source)	March 2015	ExLibris (Voyager)
Northampton	Innovative Interfaces	March 2015	Capita
Sussex	ExLibris	February 2015	Capita
York St John	Capita	February 2015	SirsiDynix
Hertfordshire	PTFS (Koha Open source)	January 2015	ExLibris (Voyager)
Aberystwyth	ExLibris	December 2014	ExLibris (Voyager)
Bangor	ExLibris	December 2014	Innovative Interfaces
Cardiff	ExLibris	December 2014	ExLibris (Voyager)
Cardiff Metropolitan	ExLibris	December 2014	Capita
Gyndwr	ExLibris	December 2014	Innovative Interfaces
National Library Of Wales	ExLibris	December 2014	VTLS
Royal Welsh College of Music & Drama	ExLibris	December 2014	ExLibris (Voyager)
South Wales	ExLibris	December 2014	Capita
Swansea	ExLibris	December 2014	ExLibris (Voyager)
Trinity St David	ExLibris	December 2014	Capita
Edge Hill	Capita	October 2014	Innovative
Open University	ExLibris	August 2014	ExLibris (Voyager)
Harper Adams	Innovative	May 2014	Capita
Natural History Museum	ExLibris	April 2014	SirsiDynix

<http://helibtech.com/Procurements>

“Library services platforms can no longer be considered ‘next generation systems,’ but rather by now well established products that have seen implementation in hundreds of libraries.”

Library Services Platforms: A Maturing Genre of Products. Marshall Breeding ALA TechSource. May 2015

Consolidation: companies and products

“One of the basic trends in the library technology industry is the consolidation of the companies that has transpired over the last few decades through mergers and acquisitions.”

Marshall Breeding ALA Techsource October 2015



Consolidation: library shared services

Wales

Scotland?



Do you need a LSP? What are the problems to be solved?

User (librarian and library customer) experience

“All these systems tend to have their own specialised staff, workflows, metadata formats and supporting technical infrastructure. What we see (or more importantly, what the user sees) is a bewildering array of systems and interfaces that have grown up at different times to meet different needs.”

“While the unification of all systems may remain a pipe dream, reducing the silos is not.” Most librarians now view the integrated management of print and electronic resources as a core requirement and are beginning to look for further integration. Reading list capability, up to now managed by add-on systems such as Talis Aspire and Rebus:list, is becoming fully integrated.

Library management system to library services platform. Resource management for libraries: a new perspective. HELibTech Briefing paper. Ken Chad HELibTech August 2015. DOI: 10.13140/RG.2.1.4315.3128)

Do you need a LSP? What are the problems to be solved?

Efficiencies

Better management of collections

“Library resource management now encompasses a much greater diversity of material, physical and virtual locations, and business models than a generation ago when many of the installed library systems were designed.”

Better more integrated workflows

“Libraries are looking for more coherent and efficient workflows for managing print, electronic and digital resources and this is hard to achieve with a legacy system.

More efficient infrastructure

“With all the competing demands on university libraries it becomes harder and harder to justify effort being devoted to managing tasks such as software upgrades and system back-ups.”

“We will see the beginning of the dawn of infrastructure irrelevance.”

Library management system to library services platform. Resource management for libraries: a new perspective. HELibTech Briefing paper. Ken Chad HELibTech August 2015. DOI: 10.13140/RG.2.1.4315.3128)

Do you need a LSP? What are the problems to be solved?

A better understanding of how resources are being used leading to service improvement

“The analysis of big data leading to actionable insights is broadly known as analytics”

“This approach is a step change from the familiar concept of ‘management information’. If library systems are brought together under the umbrella of cloud-based shared systems, regionally and nationally, the pot of data for analysis is larger and potentially more useful. There is opportunity to make substantial improvements in resource management using data collected automatically and analysed by a single cloud based system shared by multiple institutions.”

Library management system to library services platform. Resource management for libraries: a new perspective. HELibTech Briefing paper. Ken Chad HELibTech August 2015. DOI: 10.13140/RG.2.1.4315.3128)

Why all this fuss about the cloud?



Cloud based platforms - great for the vendor.....

“There is only one copy of the application software, one operating system and one database supporting multiple organizations on a single bank of servers. The vendor only has to deploy, develop, maintain and upgrade one copy of the software.”

Library management system to library services platform. Resource management for libraries: a new perspective. HELibTech Briefing paper. Ken Chad HELibTech August 2015. DOI: 10.13140/RG.2.1.4315.3128)

Why all this fuss about the cloud?

What's in it for the library?

“There is only one copy of the application software, one operating system and one database supporting multiple organizations on a single bank of servers. The vendor only has to deploy, develop, maintain and upgrade one copy of the software.”

= The pace of software development should increase

“There is opportunity to make substantial improvements in resource management using data collected automatically and analysed by a single cloud based system shared by multiple institutions. In 2015 *all* the [Welsh] institutions together with the National Library and National Health Service (NHS) libraries adopted a single shared services model”

= move beyond shared infrastructure to shared services

Library management system to library services platform. Resource management for libraries: a new perspective. HELibTech Briefing paper. Ken Chad HELibTech August 2015. DOI: 10.13140/RG.2.1.4315.3128)

The cloud-the new normal?

Amazon Cloud Strategy Chief Andy Jassy declared: “You can have different opinions about how complete and how fast this transition is going to happen, but it also seems apparent at this point that the cloud is becoming the new normal.”

How Amazon is turning cloud computing into the new normal. By Heather Clancy, Fortune 13 November 2014
<http://fortune.com/2014/11/13/amazon-cloud/>

Library management system to library services platform. Resource management for libraries: a new perspective. HELibTech Briefing paper. Ken Chad HELibTech August 2015. DOI: 10.13140/RG.2.1.4315.3128)

Meeting strategic needs-the real value proposition

In the end its really about the 'value proposition'. LSPs will need to get 'jobs' done better than alternative solutions



You want to increase the *impact* of the library on teaching and research outcomes?

How will the LSP help me measure that?

Flickr: Lydia Liu.Author David Falloure and Library Director Mary Cohrs
<https://www.flickr.com/photos/lydiaxliu/14712238628/in/album-72157645988313290/>

How can LSPs address strategic needs?

What does the new generation of resource management systems need to achieve? ...The same strategic concerns come up again and again:



How can learning and research outcomes be improved?



How can library resources be better aligned to the teaching, learning and research needs of the institution?



How can the user experience of library services be improved for library staff, academics and students?

Library management system to library services platform. Resource management for libraries: a new perspective. HELibTech Briefing paper. Ken Chad HELibTech August 2015. DOI: 10.13140/RG.2.1.4315.3128)

Future directions?

Integrate more 'silos'

- Reading lists
- Repositories?
- Archives?
- Research data and systems?

Educational tech?

- Sipro
- Ombiel

Libraries as (esp. OA) publishers

- Publishing platforms
- OA management (eg APCs)

This will need new kinds of platforms

Happy to help.....

kenchadconsulting

[Home](#) [About](#) [How We Can Help](#) [Resources](#) [Contact](#) 



More effective libraries - creating a great user experience

We work with libraries, businesses and sector bodies. We have proven and innovative methodologies to help create a compelling user experience.

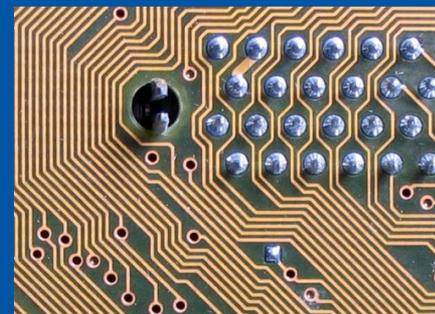
[How we can help](#)



More effective libraries - making sense of a confusing landscape...

Change, innovation and strategy....digital content and ebooks, social media, open source, open access, open data, the cloud, 'library services platforms', research data, shared services, hard economic times, and new business models

[Read More](#)



More effective libraries - improving library technology infrastructure

We have proven and innovative approaches to help deliver a more effective library technology infrastructure including library management system, repositories and systems to support research and teaching and learning. We work with libraries, businesses and sector bodies

[How we help](#)

www.kenchadconsulting.com

Kenchadconsulting helping create more effective libraries.....

Library management system to library services platform

Resource Management for libraries: a new perspective

**Higher Education
Library Technology**

www.helibtech.com

Ken Chad

Ken Chad Consulting Ltd

Twitter @kenchad

ken@kenchadconsulting.com

Tel: +44 (0)7788 727 845

www.kenchadconsulting.com