

# Potential of library service platforms

Gastreferat zur Zukunft der Bibliothekssysteme aus internationaler Sicht

**SLSP Conference 15 February 2017**

Ken Chad

Ken Chad Consulting Ltd

Twitter @kenchad

[ken@kenchadconsulting.com](mailto:ken@kenchadconsulting.com)

Tel: +44 (0)7788 727 845

[www.kenchadconsulting.com](http://www.kenchadconsulting.com)

# Ken Chad –some of the things I do.....

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www.kenchadconsulting.com



## 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](#)

### Briefing paper

## Higher Education Library Technology

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](https://orcid.org/0000-0001-5502-6898))

### Rethinking the Library Services Platform

#### Briefing paper

DOI: 10.13140/RG.2.1.4989.4481

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## Local Government Library Technology

**LibTechRFP**  
Open specifications for library systems

**Kenchadconsulting** helping create more effective libraries.....

I was asked to cover:-

- The development from ILS to library service platforms
- Possible future developments, opportunities & risks of the new solutions
- Possibilities for collaboration using library service platforms
- Any advice I can give to your project

*My contribution today should be treated as “food-for-thought”*



## Preamble

some broad context/themes  
what is going on in technology  
and libraries?

# The user is king

## consumerization

<http://en.wikipedia.org/wiki/Consumerization>



WIKIPEDIA  
The Free Encyclopedia

Consumerization is the reorientation of product and service designs around the individual end user. The emergence of **the individual consumer as the primary driver of product and service design** originated from and is most commonly seen as a major IT industry shift

The primary impact of consumerization is that it is forcing businesses.. to rethink the way they procure and manage IT equipment and services.

**Gartner.**

## Renovating the customer experience is a digital priority

Digitalization and the digital business are catalysts of change that are affecting the human-machine relationship and driving better customer outcomes.

<http://www.gartner.com/doc/2864817?refval=&pcp=mpe>

“The SLSP service platform is primarily to help academic libraries throughout Switzerland to gear themselves more specifically towards **individual customer needs**”

SLSP Project description: <http://www.library.ethz.ch/en/About-us/Projects/SLSP-Swiss-Library-Service-Platform>

**It is impossible for a user experience to be too good.....(has anyone turned to an “inferior” product because the better one was too enjoyable?).**

‘What Clayton Christensen Got Wrong’. By Ben Thompson. Stratechery [blog]. 22 September 2013 <http://stratechery.com/2013/clayton-christensen-got-wrong/>



## The library world is ramping up in terms of UX work & initiatives



### NISO Virtual Conference: Interacting with Content: Improving the User Experience

Wednesday, October 28, 2015  
11:00 - 5:00 p.m. (Eastern Time)

#### Sponsored by:

Today's virtual conference is generously sponsored by IET, The Institution of Engineering and Technology Publishing.



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### Publishers Put User Experience First, Sky Doesn't Fall

Chris Osche | October 5, 2015

Finally, someone realized that a good experience can still make money.



THE SYSTEMS LIBRARIAN

## A Cloudy Forecast for Libraries

by Marshall Breeding



Vol. 31 No. 7 — September 2011

Of all the technology trends that I've been following for the last couple of years, cloud computing continues to gain the most momentum and stands positioned to most radically transform the shape of library technology. I see that we're at one of those major turning points where technology rounds a curve into a new vision of the mainstream.

“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.**” Andy Jassy Amazon Cloud Strategy Chief. 2014

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/>

## “Multi-tenant” Cloud based platforms

“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.

**The Cloud encourages a process of deconstruction.** An ERP system doesn't solve all problems any more than the LMS/ILS does. The monolithic ERP is losing relevancy. The existence of disillusioned users is one of the core drivers in this change to what Gartner characterises as the 'postmodern' ERP.

**ORACLE** is no longer a single product suite but **sits in The Cloud alongside interoperable applications from ISVs.** In summary, Gartner's analysis is that ..... **the result will be a more loosely coupled ERP environment** with much of the functionality sourced as Cloud services or via business process outsourcers.

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What are some key issues for libraries?

“the library has an integral role in the university’s mission of research and teaching, not just a supporting one.”

UK Scholarly Reading and the Value of Library Resources: library may have a correlation to the overall strength Summary Results of the Study Conducted Spring 2011. Carol Tenopir and Rachel Volentine. Jisc Collections. February 2012

What are the problems that libraries need to solve?

College & Research Libraries



Association of College & Research Libraries

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## 2016 top trends in academic libraries

A review of the trends and issues affecting academic libraries in higher education

ACRL Research Planning and Review Committee

<http://crln.acrl.org/content/77/6/274.full>

## 2016 top trends in academic libraries

A review of the trends and issues affecting academic libraries in higher education

### Digital scholarship

To advance the educational and research processes, libraries are developing digital scholarship centers, often in partnership with other campus units. These centers extend traditional methods of research by applying new technologies, such as GIS data, visualization, and big data across the curriculum. Digital asset management, digital preservation, training, consultations, and tools for digital scholarship are among the suite of services and resources provided.

### Collection assessment trends

There has been a remarkable shift to the incorporation and integration of more continuous, ongoing, flexible, and sustainable review of collections rather than ad-hoc project-based models. "Rightsizing" the collection has become a norm

### Evidence of learning: Student success, learning analytics, credentialing

Student success continues to be an important focus for higher education institutions, where the trend towards performance-based funding and accreditation criteria includes an emphasis on learning outcomes, retention, and matriculation.

### Open Educational Resources (OER)

OER are experiencing a watershed in higher education in the United States, as articles in major news media drive public awareness of the high cost of college-level textbooks.



# How will new library solutions address these issues?

**OA2020** – initiative for  
the large-scale transition  
to open access

<https://oa2020.org/>

**Jisc**

“New UK-wide service will transform  
library collaboration: The National  
Bibliographic Knowledgebase”

<https://monographs.jiscinvolve.org/wp/2017/02/02/new-uk-wide-service-will-transform-library-collaboration-the-national-bibliographic-knowledgebase/>

R & D project

## Research data shared service

Advancing research data management through collaboration



<https://www.jisc.ac.uk/rd/projects/research-data-shared-service>

# Open Access: How will a new library system help with this?



**“Most research libraries in the world are still deeply grounded in the subscription system and have yet to recognize and adopt the goal of transformation to an open access publishing system.”**

**Remove any barriers to subscription budgets being merged with publication funds;** subscriptions and OA payments need to be consolidated under a single management: **don't allow your system to support separation**

Implement mechanisms to monitor (transparency!) **and analyze costs of scholarly publishing** (for instance, build on the example of the German APC initiative or others that document their OA payments, such as the Austrian Science Fund or the Wellcome Trust).

# How will new library solutions address *teaching* excellence?



**Review of the research literature  
on defining and demonstrating  
quality teaching and impact in  
higher education**

Lucy Strang, Julie Bélanger, Catriona Manville and Catherine Meads

[https://www.heacademy.ac.uk/system/files/resources/defining\\_and\\_demonstrating\\_teaching\\_quality\\_and\\_impact.pdf](https://www.heacademy.ac.uk/system/files/resources/defining_and_demonstrating_teaching_quality_and_impact.pdf)

“Research excellence has historically dominated the higher education agenda particularly in relation to how the overall quality of HEIs is judged and teachers are rewarded.”

**“the importance of ‘high quality teaching’ in higher education (HE) is becoming increasingly emphasised both in the United Kingdom (UK) and abroad**

Excellence in teaching has become entrenched in higher education policy and in the educational strategies of academic institutions, and increasingly linked to the performance and assessment of these institutions”

# Part 1: ILS to LSP

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# The ILS hit a roadblock



Ada Gonzalez. Roadblock Flickr CC

“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.**”

*Marshall Breeding, 2011*

‘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>

# The tipping point...?

“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”. 2012



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>

# The tipping point...?

“A key pressure point for change has been the inability of legacy systems to provide effective management for what the University of Sheffield [ in 2012] called the “full spectrum of library collections.”

## **Higher Education** **Library Technology**

*Briefing paper*

**Library management system to library services platform.**

**Resource management for libraries: a new perspective**

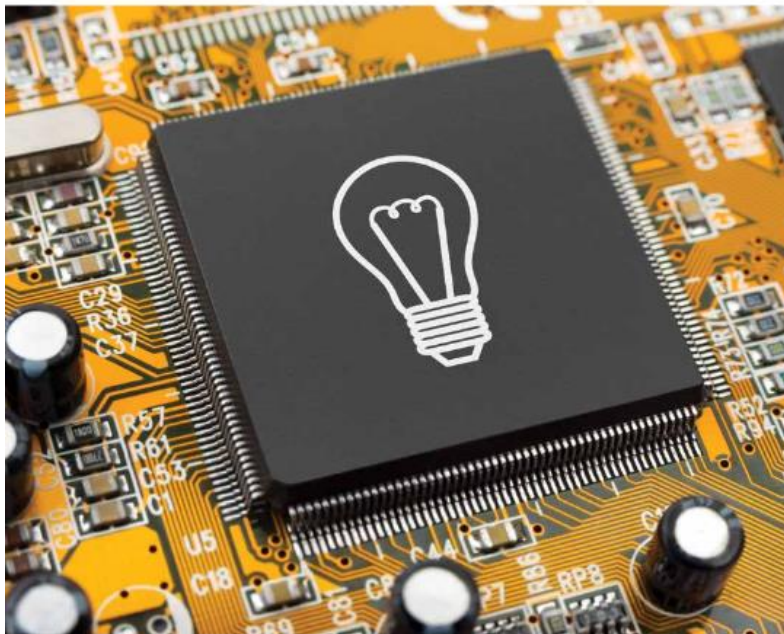
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## THE FUTURE OF LIBRARY SYSTEMS: LIBRARY SERVICES PLATFORMS



CARL GRANT

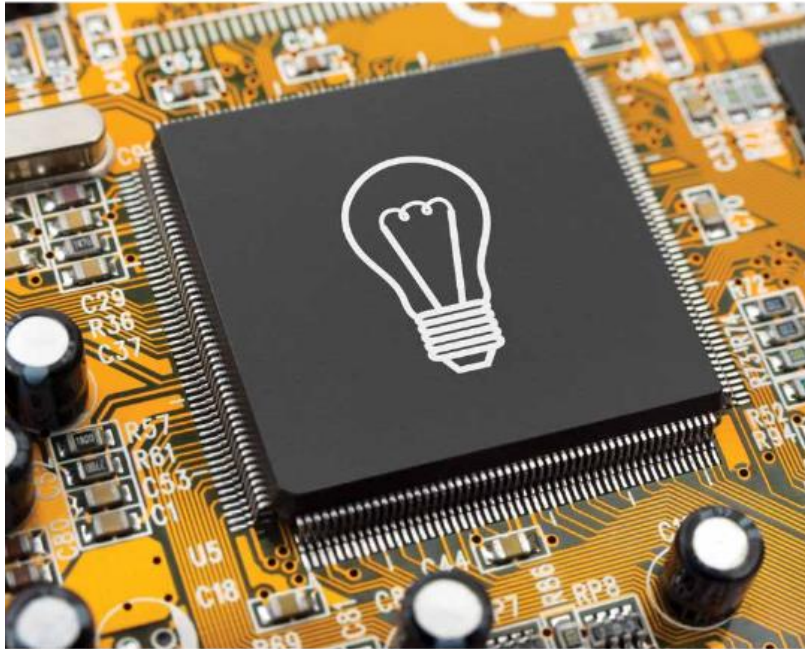
“the older ILS do not take advantage of the latest offerings in computing technologies and architectures, particularly in the area of cloud computing.” Carl Grant [2012]

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](http://www.niso.org/apps/group_public/download.php/9922/FE_Grant_Future_Library_Systems_%20isqv24no4.pdf)

“Sometimes you have to start over”

## THE FUTURE OF LIBRARY SYSTEMS: LIBRARY SERVICES PLATFORMS



CARL GRANT

Sometimes you have to start over

“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 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](http://www.niso.org/apps/group_public/download.php/9922/FE_Grant_Future_Library_Systems_%20isqv24no4.pdf)

# Sometimes you have to start over...

But sometimes the start over doesn't go far enough..

“A librarian reviewing the Quali solution commented that while the community development model of OLE is a key selling point, the **librarians helping to develop the software are not thinking radically and the outcome has been a traditional, conservative..ILS.**”

## Higher Education Library Technology

### Rethinking the Library Services Platform

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# The library services platform (LSP) arrived!



**“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.” *Marshall Breeding 2015*

Library Services Platforms: A Maturing Genre of Products. Marshall Breeding ALA TechSource. May 2015  
<http://www.alatechsource.org/blog/2015/05/new-library-technology-report-library-services-platforms.html>

## Part 2: Platforms the opportunities, risks and the future



## “Platforms are eating the world”

“Now, market upstarts are displacing market leaders faster than ever before as entire industries transform. We are in the midst of a **seismic shift in business models**, powered by the Internet and a **generation of connected users**.”

Business leaders, today, develop platforms that connect diverse participants with one another and enable them to interact and transact”

Sangeet Paul Choudary, Geoffrey Parker and Marshall Van Alstyne. Outlook 2014: Platforms are Eating the World. Wired Blog October 2014 <http://www.wired.com/insights/2013/12/outlook-2014-platforms-eating-world/>

# Platforms-new solutions to old problems

## “Platforms are eating the world”

WIRED

Today's network platforms aid the creation of entirely new markets by **connecting producers and consumers with each other.**

Sangeet Paul Choudary, Geoffrey Parker and Marshall Van Alstyne. Outlook 2014:  
Platforms are Eating the World. Wired Blog October 2014  
<http://www.wired.com/insights/2013/12/outlook-2014-platforms-eating-world/>



THE FIVE LAWS OF LIBRARIANSHIP  
**ACCORDING TO**  
DR. S.R. RANGANATHAN



EVERY BOOK ITS READER



EVERY READER HIS BOOK



<http://librarysciencedegree.usc.edu/resources/infographics/dr-s-r-ranganathans-five-laws-of-library-science/>



# Platforms-what's driving their rise?



Three forces are powering the rise of platforms:  
**ubiquitous network** access with ever-increasing  
**mobile penetration, reputation systems** that  
**enable trust** among distributed strangers, and  
access to low cost shared infrastructure with tools  
and data to capture and coordinate interactions..

Sangeet Paul Choudary, Geoffrey Parker and Marshall Van Alstyne. Outlook 2014: Platforms are Eating the World.  
Wired Blog October 2014. <http://www.wired.com/insights/2013/12/outlook-2014-platforms-eating-world/>





Ultimately, **this transformation redefines competition.** Firms that once sought advantage based on the strength of their internal resources and channel access now face **competitors that harness armies of connected users and ecosystems of resources.** Apple's App Store, hosting nearly a million applications, offers a compelling testimony to **the power of ecosystems.**

Sangeet Paul Choudary, Geoffrey Parker and Marshall Van Alstyne. Outlook 2014: Platforms are Eating the World.  
Wired Blog October 2014 <http://www.wired.com/insights/2013/12/outlook-2014-platforms-eating-world/>

# You will face increasing competition



Libraries are so valuable they attract voracious new competition with every technological advance

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**LIBRARYJOURNAL**

<http://lj.libraryjournal.com/2013/09/future-of-libraries/start-ups-take-library-jobs-reinventing-libraries/#>

# Alternatives to using (conventional) library services

## University gives free tablet computer to new students

By Sean Coughlan  
BBC News education correspondent

25 September 2014 | Education & Family

Share



a 'library' on the student's iPad

Peter Gray, CEO and chairman of JS Group, said: "This is the first time that a whole year group have been given **a tablet loaded with their key texts for their course.**

"Universities are now in competition for students and their tuition fees and are increasingly aware of needing to attract applications"

Kortext

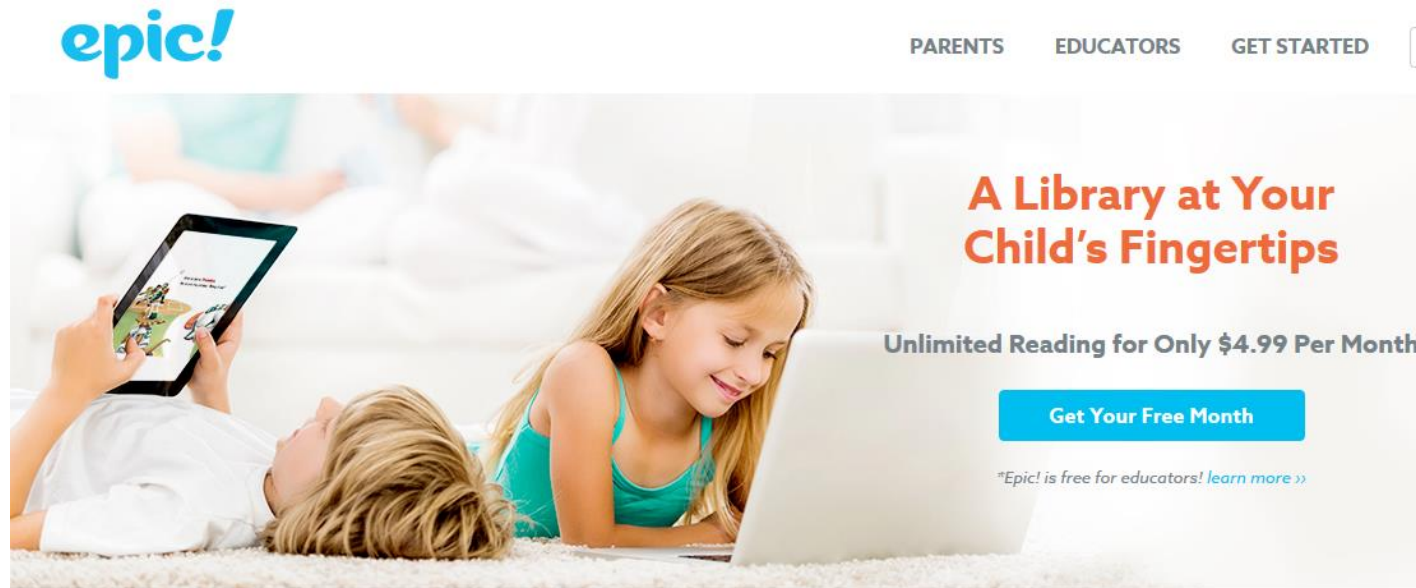
UNIVERSITIES PUBLISHERS PARTNERSHIPS STUDENTS FEATURES

UK's leading digital textbook platform

Anytime, anywhere  
any device



# A platform based library service.....?



**Instantly Access Over 20,000 Books for Kids 12 and Under**

**“the best online library that I've seen”**

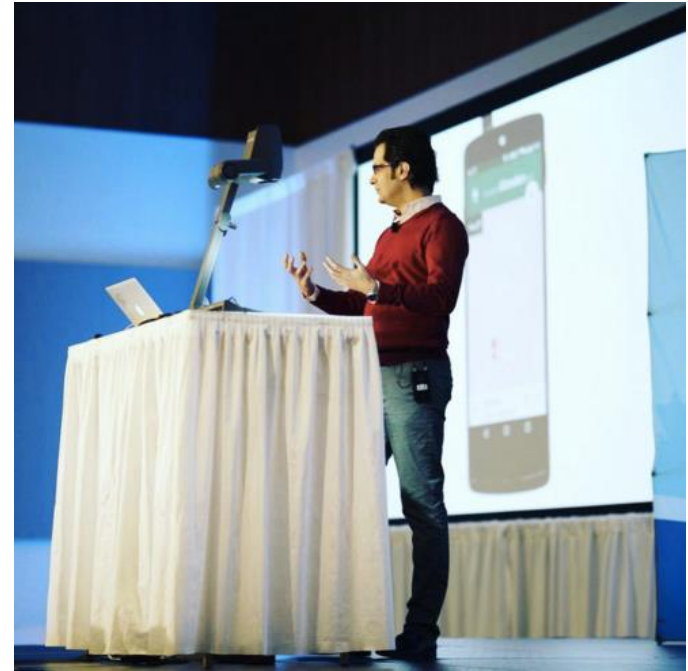
<https://www.getepic.com/>

# Can library systems offer this? The future of search lies in voice search

## Voice Search Is Growing Faster than Type

According to Behshad, speech recognition word error is as low as 8%. This is a huge improvement over two years prior, when the error rate was over 20%, and has led more and more people to rely on **voice over type because it now actually works.**

“It’s kind of a magical experience. Just take your phone and ask it about the things around you”



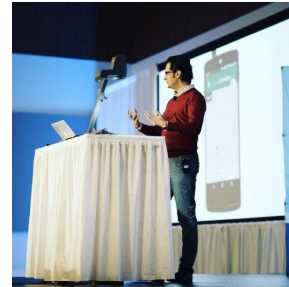
**Behshad Behzadi, Director of  
Conversational Search @ Google**

<http://www.wordstream.com/blog/ws/2016/03/02/smx-west-google-voice-search>

# The ultimate assistant—a digital librarian?

## The *Ultimate Assistant* will understand your *intent*

the ultimate assistant should understand the world, you and your world, and your current context. It will be an intent expert.



<http://www.wordstream.com/blog/ws/2016/03/02/smx-west-google-voice-search>

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### A new take on an 1980s idea...

“Belkin and other researchers at **City University London** conducted a series of **studies in 1980’s** with a goal of revealing the functions and structure of information seeking interactions between intermediaries and information seekers by using methods and techniques developed for discourse linguistic studies...**The studies suggested that analysis of interactions between a trained intermediary and an information seeker can contribute better designs of IR systems”**

2.2 Discourse Analysis and Information Seeking Based upon the ASK hypothesis  
<http://onlinelibrary.wiley.com/doi/10.1002/meet.2009.14504603116/pdf>

Insights – 27(3), November 2014

Doing away with the library catalogue | Simone Kortekaas and Bianca Kramer



## Thinking the unthinkable – doing away with the library catalogue

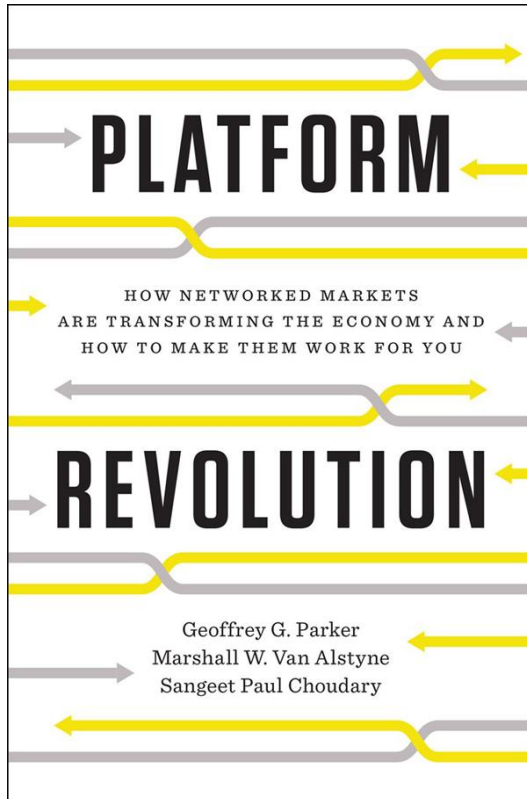
*Based on a paper presented by Simone Kortekaas at the 37th UKSG Annual Conference, Harrogate, April 2014*

“At Utrecht University we strongly believe that **academic libraries have lost their role in the discovery** of scientific information and should focus on delivery instead”.

“Without your own discovery tool you might feel stark naked. However, we have to admit that **others can do a better job** on discovery, so don't spend too much time on this. **Make a priority of your delivery task** and rethink the way you can provide value for your users”



# So what does “Platform” mean?



A platform:

**consummates matches** among users and facilitates the exchange of goods, services or social currency--- enabling value creation for all participants

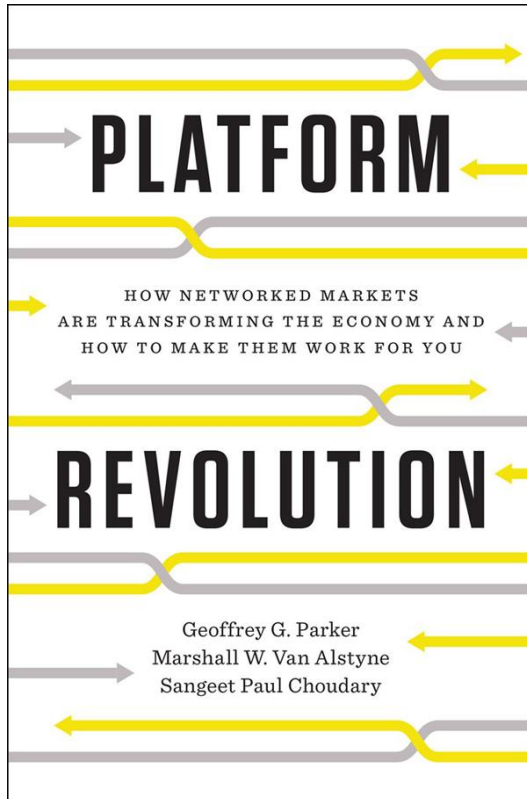
Create value **using resources they don't own** or control—so they can grow much faster

Platforms derive **value from the communities** they serve

**Platforms invert companies—from a** traditional inward focus to an outward focus



# Platform attributes



## The Core interaction:

the single most important activity that takes place- **the exchange of value** that attract most participants—involves three components....

### Participants

- producer (creates value)
- consumer (consumes value).

These are *roles*. A person or organisation might be both

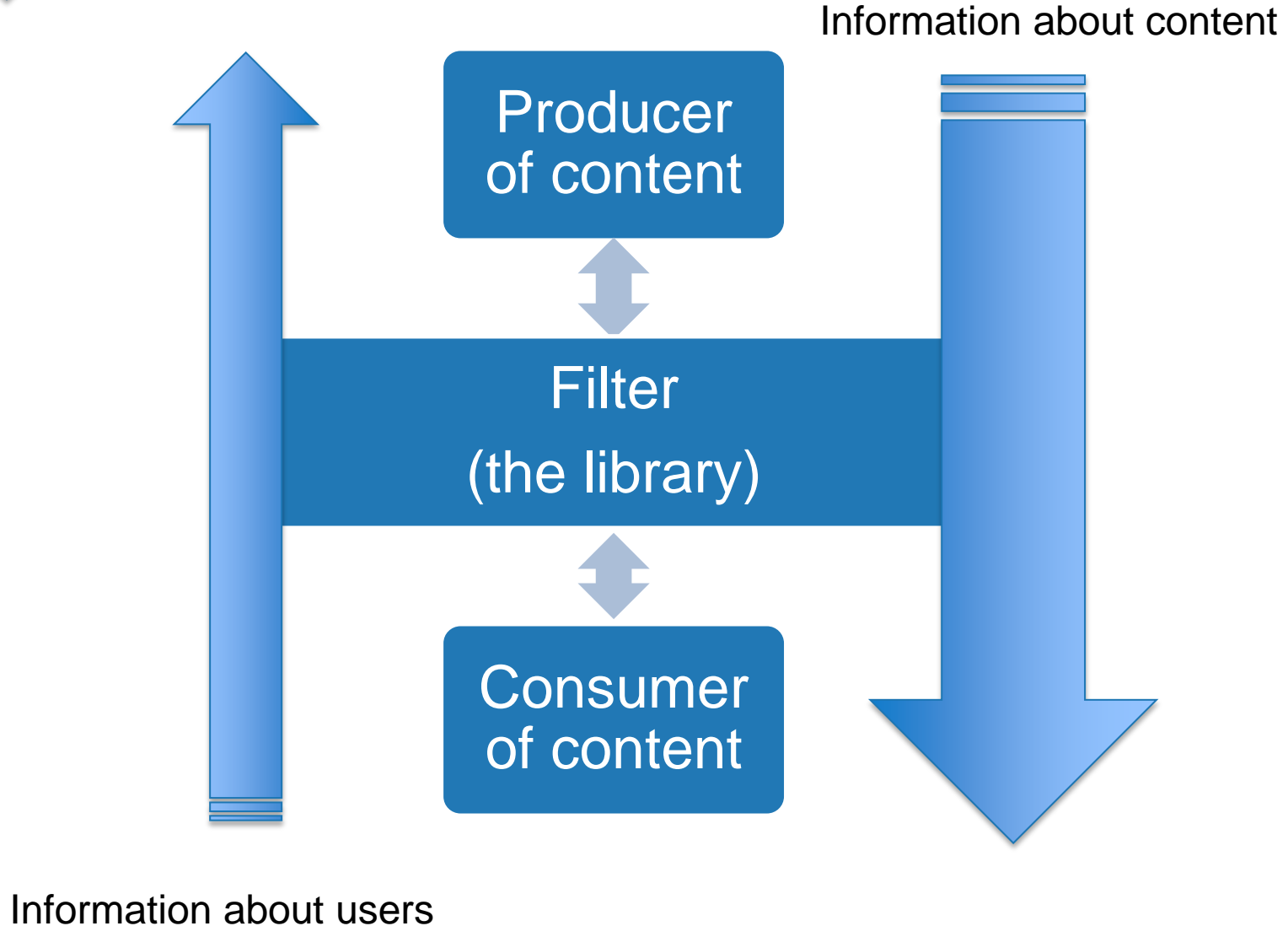
### Value unit

Typically a product or services

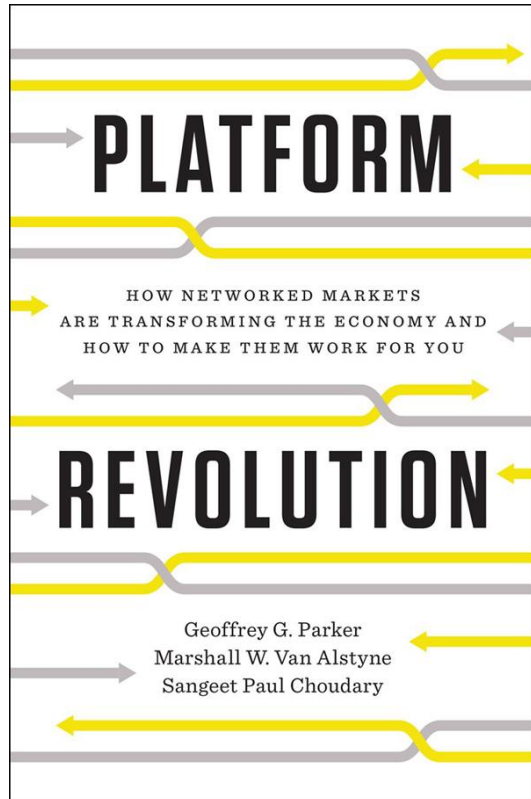
### Filter

Ensures platform users receive only value units that are relevant and valuable

# Platform in a library context



# Platform attributes



## Extensibility:

Create value using resources they don't own or control—so they can grow much faster

Platforms derive value from the communities they serve

## Extensibility

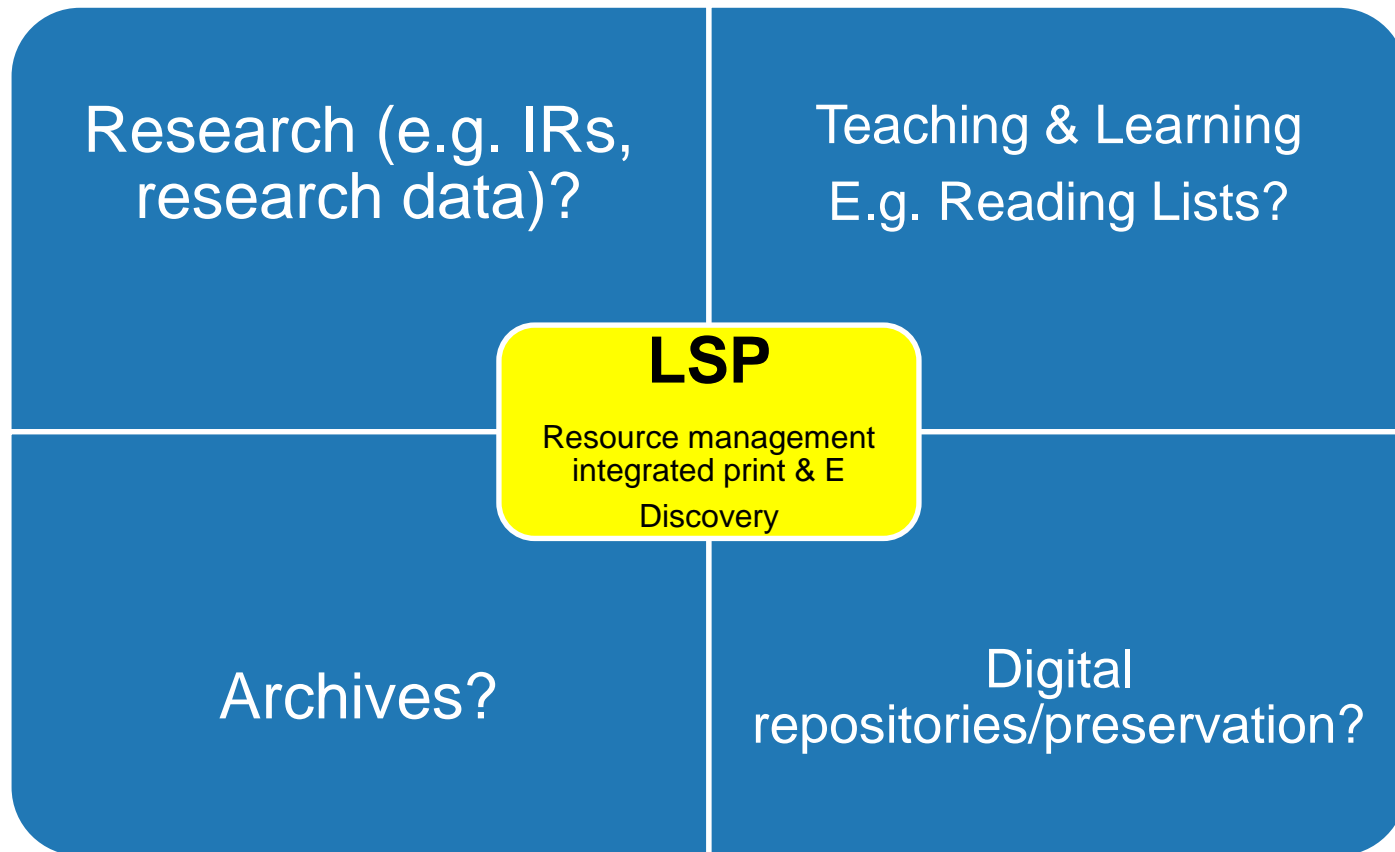
Apple's App Store, hosting **nearly a million applications**, offers a compelling testimony to the power of ecosystems.



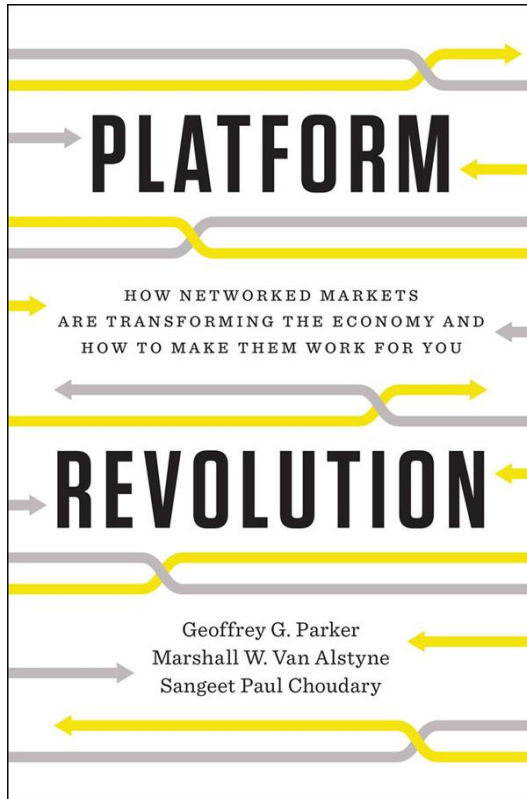
Sangeet Paul Choudary, Geoffrey Parker and Marshall Van Alstyne Outlook 2014: Platforms are Eating the World. Wired Blog October 2014 <http://www.wired.com/insights/2013/12/outlook-2014-platforms-eating-world/>

# Platforms: extensibility. How extensible are LSPs?

The LSP doesn't do it all



# Platforms: openness



“It’s axiomatic that a vibrant and healthy platform is dependent on the value created by partners who are outside the platform itself. **If a platform is too closed , then partners cannot or will not contribute”**

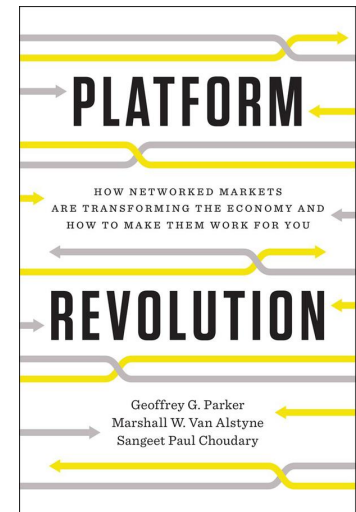
# Who will be allowed to develop on your library services platform?

Kinds/degrees of openness regarding participation. **How open is the platform in terms of *types of developers*?**

Core (basic platform capabilities)

Extension (add features & enhance value –typically via APIs)

Data aggregators (harvest data about user & interactions and re-use/re-sell)



# Current library platforms are not very open

“There have been some modest steps to encourage third party developments. Both the OCLC WorldShare and ExLibris Alma platforms have established **developer networks** but they **remain small and unattractive to third party developers**, so have gained little traction.”

## Higher Education Library Technology

### Rethinking the Library Services Platform

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## Part 3: Possibilities for collaboration using library service platforms

## The benefits of a shared library management system – and why Wales is leading the way



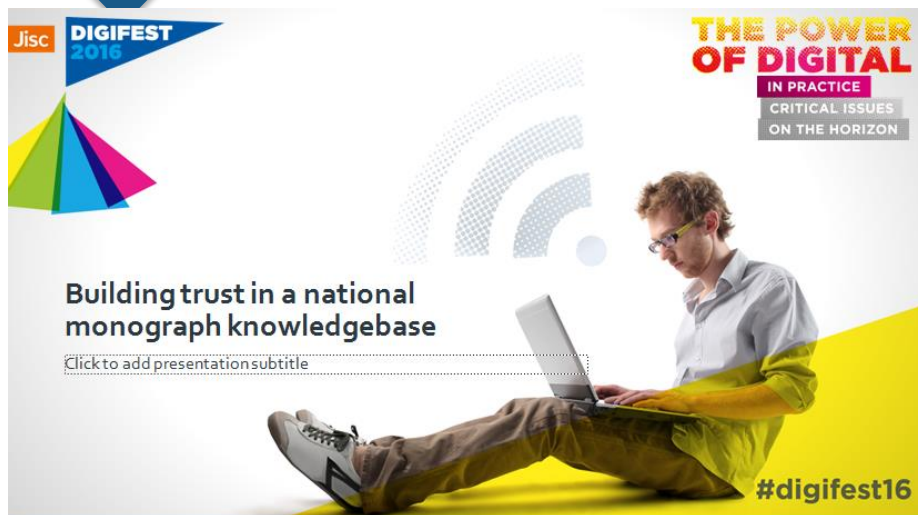
by Sharon Cook (@S\_Cook2013) on 10 October 2016

In a groundbreaking achievement, all universities in Wales, NHS libraries and the [National Library of Wales](#) now share a single, bilingual library management system (LMS).

<https://www.jisc.ac.uk/blog/the-benefits-of-a-shared-library-management-system-and-why-wales-is-leading-the-way-10-oct-2016>

“A shared LMS can **streamline working practices allowing institutions to share information**, reports, workflows and resources easily.

Students and researchers can now search library collections throughout Wales in a consistent way. It is envisaged that the platform will have the potential for a student in one university to access a resource at another.



## What problems are we trying to solve?

“Libraries want to make **data-driven decisions about the management of their digital and print book collections** but the data that is currently available does not allow them to do this with confidence”

“Libraries want to ensure that researchers and learners have **sustainable and convenient access to digital books** but it is currently not obvious what is available or what could readily be made available”

<http://www.slideshare.net/JISC/building-trust-in-a-national-monograph-knowledgebase-sc-digifest-2016>



“Academic Libraries of Indiana (ALI): ALI-PALNI Shared Print Project: In 2013, 36 Indiana academic libraries came together to take part in the ALI/PALNI Shared Print Project. By sharing their resources, the **libraries were able to engage Sustainable Collection Services** to analyze the circulating print monographs of each library individually and as a whole. The Project has both short-term and long-term goals. In the short-term, **libraries are able to make data-driven decisions about weeding their collections** and reclaim space for student use. As we look to the future, **the Project can also be the foundation for a shared collection mindset and allow greater cooperative collection development.**

<http://papr.crl.edu/program/67/academic-libraries-of-indiana-ali-ali-palni-shared-print-project>



“OCLC Research and RLUK, have been working together on a joint initiative to help inform **shared collection management decisions**”

<http://www.rluk.ac.uk/about-us/blog/oclc-rluk-collective-collection/>

Summary so far.....

# The future: more open library services platforms?

**“No single vendor will be able to develop all the applications necessary to meet the technology requirements of a complex library – and librarians like to see choice in the market.**

A more open library technology ecosystem would eliminate the restrictions of a closed and monolithic suite of services from a single vendor.”

## **Higher Education Library Technology**

### **Rethinking the Library Services Platform**

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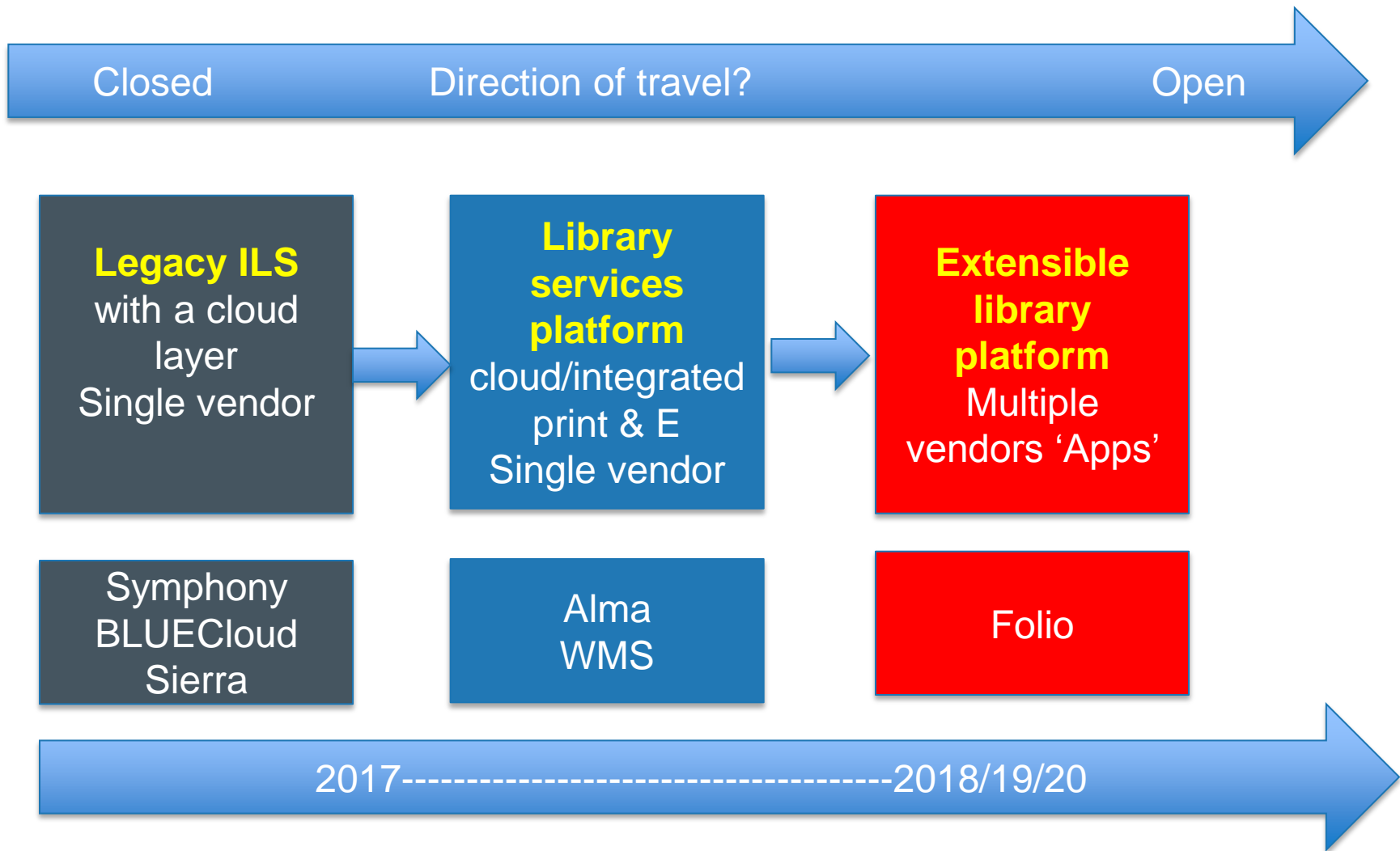
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# Where are library systems now and where are they going?





## Part 4: Advice

# Advice



# The time to innovate?



LIBRARY INNOVATION

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*Article*

**Academic Libraries and Innovation: A Literature Review**

Curtis Brundy

Academic libraries are facing times of unprecedented challenge and unparalleled change. **Innovation has moved from a consideration to a necessity.**

<http://www.libraryinnovation.org/article/view/420/625>

The basic issues don't change -success factors for a 1990s project-

- **Political support** and enthusiasm by members of the consortium
- **Flexible management** in all authorities who were prepared to make sacrifices in the interest of the consortium's objectives, coupled with an openness that precluded any hidden agendas
- **Tight project management**
- **Clear terms of reference for** individual groups and clear ground rules
- **Good communication** systems
- **Expert technical advice.**

'The benefit of Foursite: a public library consortium for library management systems', By Rob Froud.  
Program 33(1), 1999, 1-14

“a shift from bureaucracy to enterprise..”

**“It requires a shift from bureaucracy to enterprise, an adaptive organization that reviews and reshapes what it does in light of changing requirements”.**

“in an environment of change while overall mission and values may remain the same, new and shifting goals become the norm. ....

As goals shift in a changing environment, so does the need to think about how to marshall the means to meet them. **This may need reorganization, new staff skills, changing priorities, reallocation of staff and resources,** and so on.

The enterprising librarian. Lorcan Dempsey. Blog 30 June 2012.  
<http://orweblog.oclc.org/archives/002201.html>

# Potential of library service platforms

Gastreferat zur Zukunft der Bibliothekssysteme aus internationaler Sicht

**SLSP Conference 15 February 2017**

Ken Chad

Ken Chad Consulting Ltd

Twitter @kenchad

[ken@kenchadconsulting.com](mailto:ken@kenchadconsulting.com)

Tel: +44 (0)7788 727 845

[www.kenchadconsulting.com](http://www.kenchadconsulting.com)