Library infrastructure: value for money?

Library System Programme Workshop
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where is the best value? where is it best to focus our efforts?

is what you do aligned to strategy?
(if it isn’t what value does it have?)

`strategy...a **cohesive response** to an important challenge....`  

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

<table>
<thead>
<tr>
<th>Library Systems</th>
<th>Annual Costs</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Hardware</td>
</tr>
<tr>
<td></td>
<td>£8,500</td>
</tr>
<tr>
<td>Print management-LMS</td>
<td>£8,500</td>
</tr>
<tr>
<td>E-resources management</td>
<td>£22,000</td>
</tr>
<tr>
<td>Other: Discovery, Reading lists, IR, digitisation, archives &amp; special collections</td>
<td>£26,000</td>
</tr>
</tbody>
</table>

**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 your 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.'

“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.

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.**”

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
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
what do *vendors* think the biz case is?
a vendor’s (ExLibris) view
http://www.exlibrisgroup.com/category/AlmaOverview

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
a vendor’s (ExLibris) view
http://www.exlibrisgroup.com/category/AlmaOverview

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
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
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.

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
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
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”.

"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 single 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 workflows 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](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.’

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.....

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’?
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