

# HEFCE Shared Services SCONUL Feasibility Study

Update – 8 December 2009

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# The Shared Services Study

The study was tasked to investigate the Library Management Systems landscape within UK Higher Education, with the aim of identifying

- what, if any, opportunities exist to develop a shared service response (possibly Open Source) within the current LMS landscape
- whether there is a viable business case and delivery model to support any such opportunities

# The Survey

Responses identified a distinct group of systems functions & human operations as candidates for shared services:

- Principal interest is clearly focused around e-resource licensing and management and general cataloguing (all scoring 84% or greater interest)
- Services that would facilitate more efficient and value added resource discovery fell in to the next group with over 50% interest
  - OPAC, search / locate, ILL
  - Open Data services
  - Support functions such as forums and help desk
- Functions involving individual user data attracted least interest, though this may be motivated by uncertainties regarding security and DPA obligations

# The Survey

At the highest level interest may be divided between three shared services 'options' which can be separately defined but which are in no sense mutually exclusive:

- **The licensing option** – economies and efficiencies through shared procurement of e-journals and e-books (both 97%)
- **The shared systems (software functions) option** – seen as applicable to
  - management and disclosure / discovery of electronic resources
  - all types of metadata (catalogue records)
  - potentially the platform for large scale services on 3-5 year horizon
- **The shared operations option** – representing more optimised use of human resources
  - especially cataloguing (90% interest), electronic resource management (76%), digital preservation (78%)
  - Help Desk (56%)
  - could also involve consolidation of physical assets

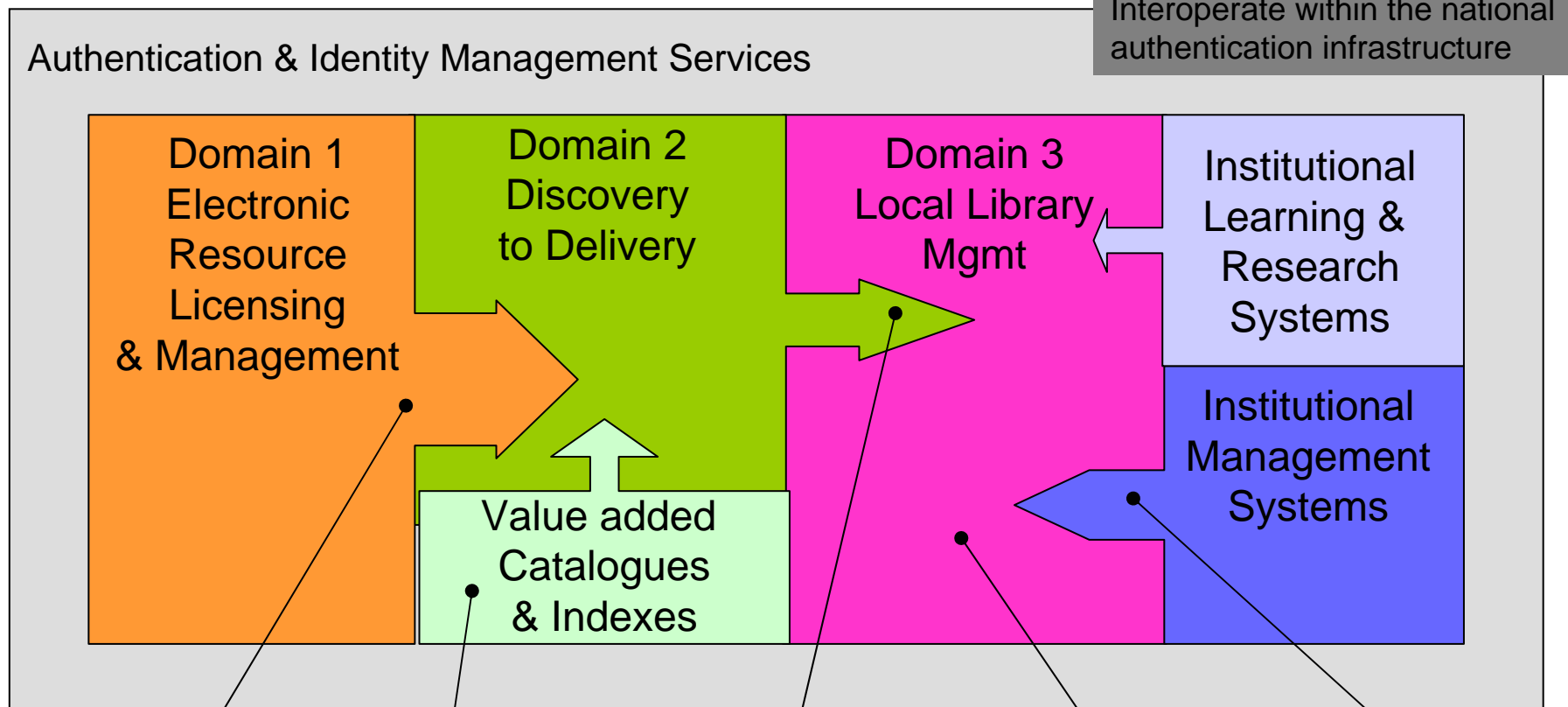
# Green Field Opportunities

- Electronic Resource Management (ERM)
  - Low levels of HEI adoption & patchy implementation
  - Expensive to implement and manage; high level staffing
  - Performing potentially national activities at a local level
  - Poorly conceived – hence the Ex Libris URM framework
- Electronic Content Search & Location
  - Google is increasingly preferred as a starting point for searches
  - Current services do not offer a complete end to end experience
  - Systems interoperation for locating ‘appropriate copy’ is fragile
- Recommender Services – a spin-off opportunity
  - Functionality not supported by LMS
  - Context-rich recommendation within trusted community
  - User activity and attention data best aggregated at national level

# What will success look like?

- Benefits
  - Cashable savings
  - Service benefits for libraries and their users
  - Wider resource access
  - Impact on behaviour of researchers, lecturers, students
- Spin offs
  - Supply side response
  - Inclusion of wider collections
  - Motivating innovation and contribution
- Take up
  - Coverage
  - Unit costs of access
  - Sustainability
- Vehicle
  - Business Plan
  - Reputation
  - Partnership Integration

# Shared Services – a platform for progress



Domain 1 generates reliable large scale availability data, transforming electronic resource discovery in Domain 2

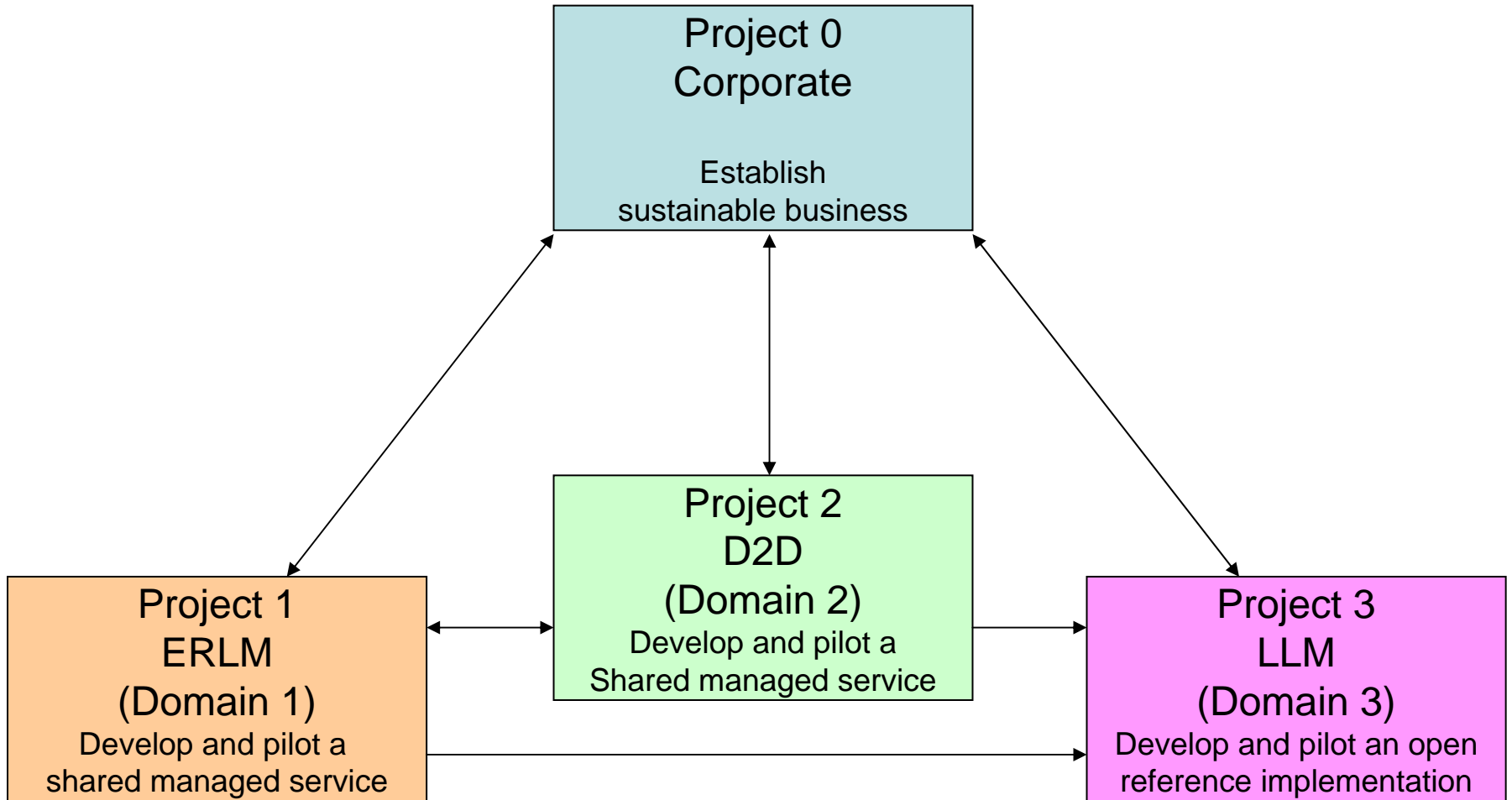
Domain 2 builds on this platform by incorporating union catalogues, finding aids, abstracts & indexes that add value at national scale.

Domain 2 aggregates a critical mass of records for electronic & print assets, becoming the default HE user search and access channel linked from Google

Domain 3 is required to manage a diminishing range of local print collection functions integrated with student, learning, research & financial systems and sharing data with the national shared services

Systems interoperate using web services

# Shared Services Pathfinder Programme Project Structure





# Domain Pathfinder Plan

