

SCONUL Shared Services Seminar

An update for SCONUL members

On 22 November, SCONUL held a meeting updating members on the progress of its work on shared services. This followed the JISC Collections AGM at the Institute of Mechanical Engineers at 1 Birdcage Walk, Westminster.

For member representatives who were not able to be there, the following is a short summary of the main points made. In addition, the meeting was recorded and a podcast of the event will be available soon.

The event was chaired by Anne Bell, Librarian at Warwick, who is Chair of the SCONUL Shared Services Steering Group.

Anne Bell, Chair, SCONUL Shared Services Steering Group

She gave a brief overview of SCONUL's work on shared services and its collaboration with JISC on this issue. The main points were as follows:

- SCONUL's work on shared services came out of a 2008 consultation event with member representatives in which the community identified the need for SCONUL and JISC to take a leadership role in relation to the LMS and related systems landscape.
- Following that, SCONUL submitted a successful bid to HEFCE to take forward a shared services study. This came in two stages. The first phase was a feasibility study looking in detail at the opportunities for shared services for SCONUL members in the library systems space – this identified significant scope and demand for a shared service involving Electronic Resource Management and Licensing .
- The next phase involved developing a business case.. This was submitted to HEFCE at the end of 2009; however the impact of the recession meant that it was not possible to secure funding for a pathfinder project.
- The Steering Group continues to meet to develop ways forward within the constraints of the current financial situation.. This includes engaging with a range of vendors and service providers about their development plans to map these against the vision articulated in the SCONUL shared services study and to examine whether this provides a route forward.
- Work being undertaken by JISC Collections and JISC in collaboration with SCONUL is also supporting the vision articulated in the study.

Lorraine Estelle, Chief Executive Officer, JISC Collections

She gave an outline of the ways in which JISC Collections' work relates to the shared services agenda being pursued by SCONUL. The main points are as follows:

- JISC Collections is a shared service, which provides a comprehensive service to members over the lifetime of digital resources
- There are two main areas of work – JISC Collections' negotiations with publishers and its management of licenses. It also hopes to be able to provide shared services centrally which will save duplication of effort at the library level.
- Negotiations going forward are going to be a shared activity as the landscape shifts. Working with publishers and meeting their demands means that JISC Collections is going to have to work differently, and sometimes institutions will also have to work differently, and this can be challenging. JISC Collections will be focusing on this with discussions with member institutions this year.
- JISC Collections have developed a new shared service in its usage statistics portal which uses machine to machine technologies to enable analysis as well as recording of usage statistics and is an effective one stop shop for these.
- The organisation is also working with the US academic Carole Tenopir to look at the return on investment of spending on scholarly journals specifically in the UK context.

Liam Earney, Head of Licensing and Customer Service, JISC Collections

He outlined some of the work that JISC Collections is undertaking on a licensing tool. The main points were as follows:

- Paper licenses are cumbersome and difficult to analyse and JISC Collections is developing ways of assisting members in managing them.
- It has been involved in work to develop these since 2007 and has now won funding from JISC to create a licensing comparison tool. This will allow members to compare different licenses and will also allow end users in libraries to see what you can and can't do with licenses in a very straightforward way.
- So far JISC Collections has created about 50 machine readable licenses and have a beta version available. It is hoping to launch the service in the new year.
- Another shared service that JISC Collections is working on in response to member needs is a development of their original PECAN service. This will provide members with a repository of information about their entitlements to journals to which they have subscribed in the past.
- JISC Collections has also been given funding to procure digital perpetual archives, although access for institutions metered. Working with MIMAS, JISC Collections are currently building a database bringing together all this archival material.

Ben Showers, Programme Manager, Digital Infrastructure, JISC

He outlined the main features of the two projects which are being carried out in collaboration with SCONUL.

The main points are as follows:

- The first project will look at a shared ERM service. SCONUL will be engaging with around 18 institutions of a range of sizes. The work will be driven by the institutions themselves and will work at quite a granular level - looking at ERM as it currently is used in the individual institutions
- It will look at the technical requirements for an ERM in each institution and identify the scope for efficiencies and common working.
- Alongside this work, JISC are collaborating with Kuali Open Library Environment (KOLE) in the US which is undertaking a similar exercise. The user case studies developed as a part of the JISC/SCONUL project will help refine the work of the KOLE project, while their development of work flows and processes will help enhance and shape the work being carried out in SCONUL's engagement with UK institutions. Comparing findings should help make the work robust.
- SCONUL and JISC will together take a fresh approach to project reporting and dissemination on this project, using blogs and wikis to manage and communicate the work, alongside community events. SCONUL members will be able to follow developments on the HELibTech Wiki via a link on the SCONUL home page.
- The second project will look at user experience and open source software case studies developed through the JISC library management systems programme. It will focus on the experience of users and the local capacity for, and viability of, open source systems: for example Swansea's experience with Evergreen and Salford's experience of open ERM solutions.
- There will also be two community events with members which will look at questions such as how to manage a shared service while keeping local competitive advantage.

Rachel Bruce, Innovation Director, Digital Infrastructure, JISC

Rachel Bruce described how the SCONUL/JISC projects fits into the broader picture of JISC's work. The main points were as follows:

- The SCONUL shared services project set out three main domains of activity: Domain 1 covers licensing and ERM; domain 2 covers discovery to delivery and domain three covers LMS futures.
- The work we are undertaking with SCONUL on user case studies and our collaboration with Kuali OLE map onto and inform SCONUL's Domain 1.
- The work of the Research Discovery Task Force relate to Domain 2. This is a JISC project which is looking at the here and now and how we are able to deal with wide variety of resources - what sort of shared services might we be able to deliver in research discovery.
- Our joint work on the user experience and the open source strand – target key strategic concerns relating to LMS.
- They all contribute to the vision of the SCONUL shared services study.
- This should make it clearer how all of these pieces of work map onto the entire Shared Services map. This is about seeing the whole picture – even though the interventions we're making at present are relatively small and tactical.
- Much of JISC activity is about building and delivering a UK digital library, this includes both JISC services and innovation programmes; and JISC will be looking for areas in which we can deliver results and where also we can be more efficient.
- JISC will be delivering in partnership with others.

Nick Lewis, Library Director, University of East Anglia

He described his experience of developing a pilot case study at the University of East Anglia and set out the methodology used.

The main points were as follows:

- He worked with his staff to try and identify the activities they were currently undertaking which were problematic, time-consuming or which were duplicated for no gain, and which would benefit from some kind of shared service.
- The purpose was to tease out what some of the actual and potential benefits may be, taking a bottom up approach, and allowing the main issues to emerge from discussion.
- Having built up a story of how UEA approaches its back of house and ERM activities, they then chose a case study area: the work that we undertake when a publisher changes their e-journal platform.
- They then used a 'Requirements Capture' template to ensure that all key details were recorded.
- The potential benefits identified were that if information about URL changes was done via a centralised, national level service, publishers might be able to communicate with fewer organisations and be confident that all their customers would receive up-to-date information.
- Libraries would be able to rely on a centralised service to ensure links were updated in a timely manner.
- They also considered possible downsides and other, related benefits, as well as requirements and costs of implementation.
- The final step was to articulate the workflow which summarised the potential step-by-step process required to deliver the new service functionality, some of which may be automated (as part of the ERM), some of which may be manual 'value added' processes.
- The structured approach taken to the case study work will allow the findings from all the individual studies to be brought together and synthesised into a scoping document.

Fiona Parsons, Director, University of Wolverhampton Library and Chair of SCONUL

She brought proceedings to a close. Her main points were:

- The work on shared services had an initial setback because of the funding climate.
- However, some significant progress has been made.
- What has emerged is the serious commitment that SCONUL and JISC have to making progress and to realising their shared vision and objectives.
- The next steps are to develop a number of case studies with a spread of institutions drawn from those who have expressed an interest in shared services
- Members can keep up to date with what these projects through the project blogs and HELibTech wiki which can be accessed via the SCONUL home page.
- Updates will also be sent to members through the SCONUL mailing list.