

SCONUL Shared Services 'Community Event' - 19th May 2010

STEERING GROUP WELCOME & ORIGINS OF THE STUDY

In my capacity as chair of the project steering group, I'd like to offer a big thank you to the main members of the project team for their commitment to the project:-

- David Kay (Project Director)
- Michael Dodd (Project Manager)
- Max Hammond
- Ken Chad

In addition, I'd also like to extend my personal thanks to the other members of the Steering Group for their support and commitment to the project throughout. They were:-

- Jane Core (SCONUL Chair)
- Fiona Parsons (SCONUL Vice Chair)
- Suzanne Enright (Westminster)
- Mark Toole (Stirling)
- Ian Dolphin (JISC e-Framework programme)
- Paddy Walker (HEFCE Consultant)

We were required to deliver the project to a very tight timeframe of 9 months, starting in April 2009. At certain key stages this involved frequent meetings as well as offline discussions to confirm critical decision points. Despite this pace Steering Group members unfailingly continued to give their ongoing support to the project.

Support and input from a range of other organisations and individuals was also critical to the project. It's not possible to acknowledge everyone here but I would like to extend the Steering Group's thanks to:-

- Rachel Bruce (JISC)
- JISC Collections
- MIMAS
- Edina
- RLUK
- systems vendors, other service providers and the OLE project

The origins of the study go back to an earlier joint JISC/SCONUL study. During 2007/08 the SCONUL Executive Board discussed various strategic areas where SCONUL might undertake work in order to support its members and concluded that it would be desirable to commission work around the library systems landscape space. Following discussions with Rachel Bruce from JISC the two organisations agreed to fund jointly an horizon scan study of the library systems space which reported in April 2008. The publication of the study was followed in June 2008 with a consultation event.

That event considered major issues and themes arising from the study including:-

- Consortial and shared services
- Interoperability and institutional positioning
- Data liberation and aggregation
- Web 2.0 and Library 2.0
- Open source
- Strategic shared vision

Some excellent summary PowerPoint slides of the discussion at that event were produced on the fly – these are still available on the JISC events webpages at

<http://www.jisc.ac.uk/media/documents/events/2008/06/davidkay.pdf>.

Key themes that arose from discussion at that event included:-

- **Optimising value** from LMS and data
- Lowering barriers to library collaboration
- The **risks of operating in isolation**
- **ERM presents an opportunity**
- Importance of workflow approaches to support learning and research
- Possible opportunity of an **open source response**
- Improving **access** to content and services
- The need to focus **more on delivery** rather than discovery
- **Future role of the LMS** – backroom system or a primary integrator?
- **Data liberation** and the optimal data aggregation level
- The **network level catalogue** rather than local OPACs
- The future role and development of **large scale services** e.g. COPAC, SUNCAT
- **Leadership role** for JISC and SCONUL to take this work forward

These themes were then synthesised into 5 areas as to how the issues raised by the study could be taken forward:-

- User behaviours
- Service and toolset futures
- Data exploitation at the right network level
- Shared services to liberate effort
- Community engagement

The themes that arose from that community discussion formed the backdrop to the current study. Following discussion with HEFCE in summer/autumn 2008 SCONUL submitted a formal proposal to HEFCE to undertake a feasibility study around the potential for a shared service response in the library systems space. Following competitive process a consortium led by SERO Consulting with Curtis+Cartwright and Ken Chad Associates was selected to undertake the study.

The study was undertaken in two stages. The first was to undertake a feasibility study to identify whether there was a shared services opportunity and, assuming the case was proven, the second stage would be to develop a business case for the shared service opportunity. The Steering Group concluded at the feasibility stage that there was indeed a potential shared service opportunity and so the project team went on to develop the business case which was submitted to HEFCE just before Christmas 2009.

Thinking on future **library business models**, how to position academic libraries within the **networked environment** and the potential long-term impact of the **current recession**, are all focusing minds on what might be the **proposition (or range of propositions) for the academic library of the future**. This study is clearly situated firmly within such broader strategic thinking.

It provides a response to elements of that larger discussion by identifying a range of opportunities within the library systems space as to how collective action could create significant opportunities for users and libraries alike, how it could help underpin the future institutionally organised model of library services and how it could support the transformation of academic library services which many see as necessary and, in some aspects, overdue.

I therefore have great pleasure in now handing over to David Kay, the Project Director, who will take us through an overview of the proposed direction of travel.