

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

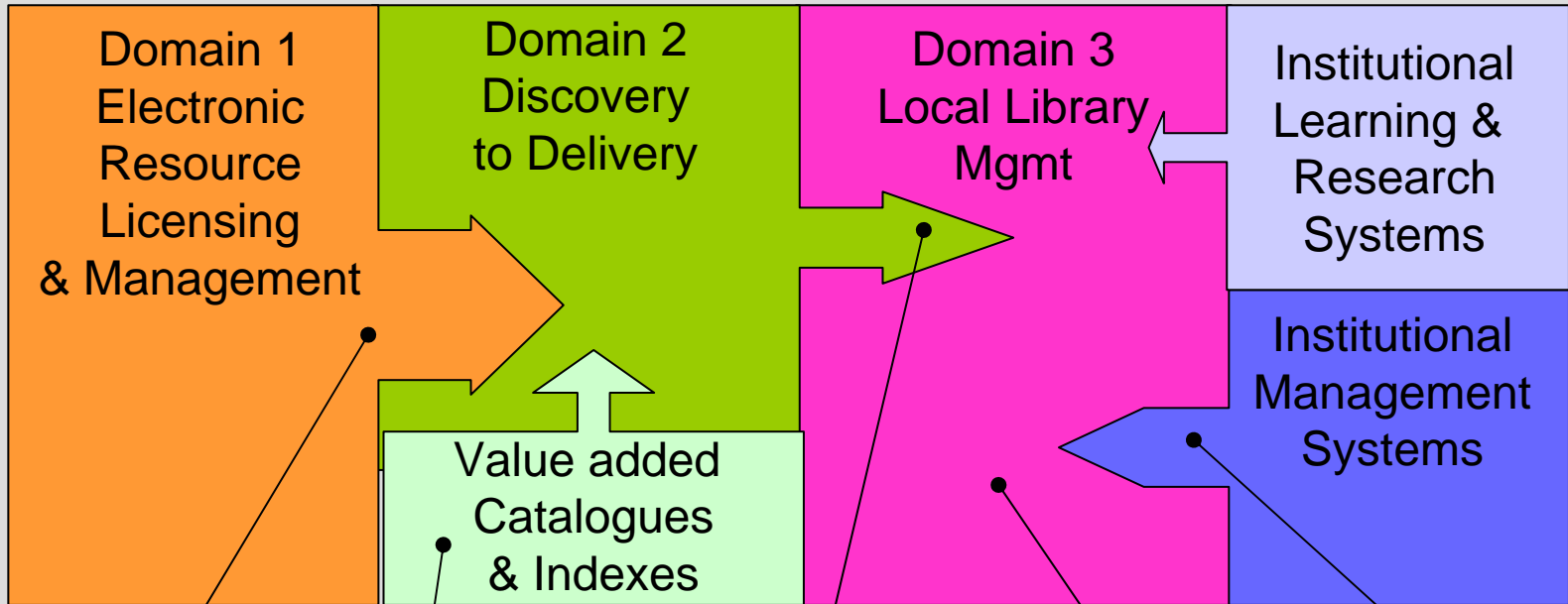
What will success look like?

- 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

Authentication & Identity Management Services

All 3 shared service domains Interoperate within the national authentication infrastructure



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.

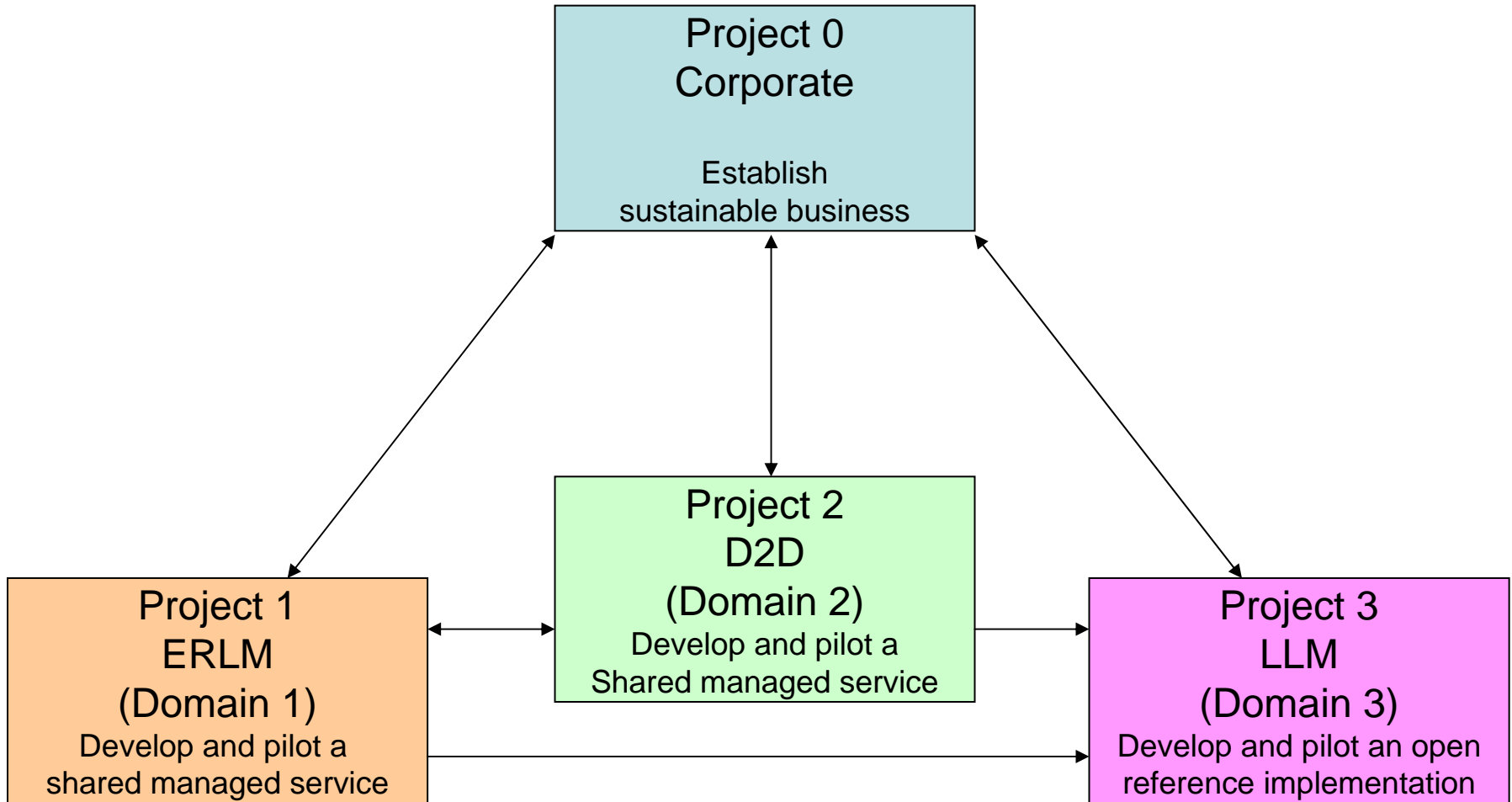
Domain 2 aggregates a critical mass of records for electronic & print assets, becoming the default HE user search and access channel linked from Google

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

