'Organisational leadership in a time of change':

SCONUL conference, Queens Hotel, Leeds, 16–18 June 2010

Conference reviewed by:
Antony Brewerton
*SCONUL Focus out-going Editor
and Head of Academic Services,
The Library, The University of Warwick
Tel: 024 765 75790
E-mail: antony.brewerton@warwick.ac.uk*

and

Valerie Stevenson
*SCONUL Focus in-coming Editor
and Head of Research and Learner
Support, Library and Student Support
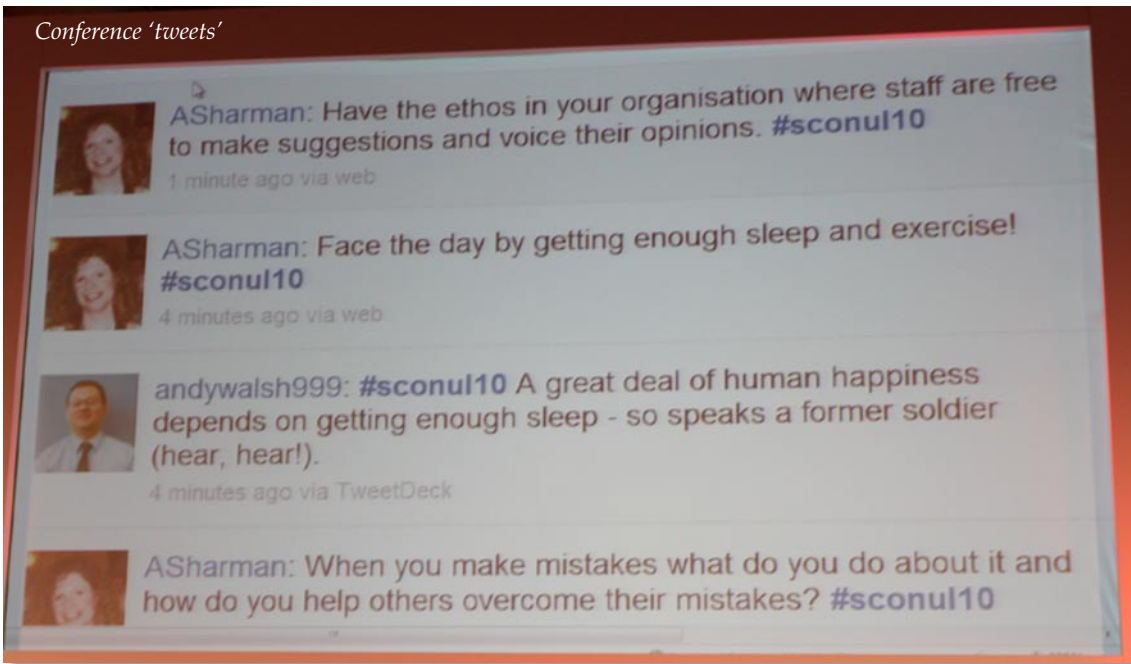Liverpool John Moores University
Tel: 0151 231 3178
E-mail: V.Stevenson@ljmu.ac.uk*

DAY ONE

Just as *The Beatles* by The Beatles will always be known as *The White Album*, the 2010 SCONUL conference, despite its official title of 'Organisational leadership in a time of change', will always be known as 'SCONUL Live at Leeds'. This is what greeted delegates on the screens as we entered the auditorium on the first day and this is what was reaffirmed in the venue of the conference dinner – but more about that later.

We were welcomed by the out-going Chair of SCONUL, **Jane Core**, who started by thanking the organisers and the students of Southampton Solent University, who would be collecting videos of feedback from delegates throughout the next three days to place on the SCONUL web site. Talking of technologies, this was also the first SCONUL conference that would be reported on Twitter: see the tweets at '#sconul10'.

Jane reinforced the theme of the conference. With the new Coalition Government we are facing much change and we need to be equipped to deal with the new landscape ahead. We need fresh ideas and we need to work together. The confer-

ence programme should hopefully provide some fresh ideas. The bits between the formal activities would definitely provide the opportunity for networking and talking to colleagues about shared pressures.

One of the great pressures we all face is providing effective leadership at such a time. **Jonathon Riley**, Director General and Master, Royal Armouries, and former Deputy Commander of NATO ISAF in Afghanistan, opened the conference programme with a thought-provoking presentation on the role of leadership in times of change, 'Strategic leadership, management and decision-making'. His move from a military role, where his last active service was in the Balkans, to a cultural heritage organisation has given him a unique perspective on management

and decision-making and, although he brought great breadth and depth of experience from his army days, he has had to be sensitive about applying it to a different culture and environment. He identified a number of constants in the 'command' or leadership role: co-operation, co-ordination, consultation, communication and, above all, explanation – repeatedly re-stating the mission and its purpose and how proposed budget cuts will affect the ability to deliver.

Jonathon believes leadership is an instinctive quality that most people have to some degree, and that it can be developed. Experience is critical, but courage – both physical and moral – is the most important component of effective leadership. The constant demands can be wearing, but it is vital for leaders to plan, organise and delegate, concentrating on their own job and not trying to do everyone else's. Decision-making is often about seizing the initiative and having the will to create or make the most of opportunities. Good planning and processes beforehand allow leaders to use intuition when new circumstances present themselves. In the context of the Royal Armouries, this has meant establishing a risk register and developing a five-year plan, which has then been adapted as a result of budgetary constraints. Change usually means cuts, and a good leader has to take the long view, maintain a strong structure and prioritise what's important. During difficult periods, leadership involves maintaining staff morale by good communication, to minimise rumours, providing mechanisms for good ideas to come from all parts of the organization and making time to walk around to observe what is happening.

Throughout his presentation, Jonathon used photographs and examples from his military career to illustrate his views on leadership. In a lively question-and-answer session afterwards, delegates were interested in exploring the application of military methods, terminology and approaches to civilian life. Jonathon's view is that people remain fundamentally the same the world over but that cultures are different. It is not possible to use the hierarchical, authoritative approach of the army in a non-military situation and the best results always come from good communication. The information load on a strategic leader is now huge, and it is essential to ensure that the right filters are in place so that leaders can focus on the essential data. 'Information' is not the same as 'media' and, although the information space has greatly opened up, governments often believe they can control the information space, which is no longer possible.

In response to a question about advice for us as leaders, Jonathon admitted that he is glad he is not starting out now, when much more is expected of people at a young age and without much life experience. Education, training, conditioning to the environment, allowing time to grow and mentoring by someone outside the management structure will all help good leaders to develop. Dealing with uncertainty is part of the job and good leaders will work with what they know, lay down the objectives and tasks for the team and carry on with training to introduce elements of certainty and the sense that the team is carrying out worthwhile activities while the leaders deal with the uncertainty.

Making the cuts required to deliver long-term efficiencies is not easy and Jonathon's advice was that ring-fencing can produce unintended consequences and should be avoided. We should cast the net wide, look at the whole business, decide what is worth doing, do it well and drop other activities, however painful it might be. Jonathon's tips for successful leadership included learning from and responding well to mistakes, trusting and supporting others while they learn, getting a good night's sleep and taking plenty of physical exercise. His final comment, in response to a question about advice for President Obama and BP, was to stop shouting at others and find the ingenious solutions to problems on the shop floor or from the riskier end of the private sector – find the Red Adair to solve this problem!

Throughout Jonathon's presentation his warmth, humanity, powers of diplomacy and sense of humour were evident, all qualities which must stand him in good stead in his strategic leadership of the Royal Armouries.

The theme of leading through difficult times was taken up by the next speaker. It was evident to all present that these are times of change and uncertainty. The change will come in reductions in funding and new funding models for teaching, as well as changes in the assessment of and investment in research. The uncertainty lies in how much funding will be reduced (after the comprehensive spending review), just what Lord Browne's findings on the funding of Higher Education in the UK will mean and what will happen (or not) with the REF (Research Excellence Framework).

David Sweeney, Director for research, Innovation and skills, HEFCE (Higher Education Funding Council for England) started his session by pondering the famous wartime motto that is currently so popular, 'Keep calm and carry on'. 'Keeping calm' is desirable, but 'carrying on' is not. We need to celebrate our success (advocacy will become an even bigger issue for us all) but we also need to plan wisely and be prepared for more challenging times ahead.

David's rousing talk and question-and-answer session was followed by the SCONUL **annual general meeting**. Details – along with the presentations of most of the speakers – can be found on the SCONUL web site (http://www.sconul.ac.uk/events/agm2010/).

Jane Core started by giving a quick overview of SCONUL's many activities and achievements over the last twelve months. SCONUL's objectives of advocacy, profile-raising, sharing good practice and helping members to plan effectively for the

future remain the same and are probably now more relevant than ever.

Office developments at SCONUL include the recruitment of a new executive director, a refurbished HQ (with a drop-down members' space) and working with the communications task force to commission a new web site (there were details on posters around the conference's main hall).

Other developments highlighted were a new international strategy for SCONUL, the 'shared services' and 'Libraries of the future' projects (details elsewhere in this review) and the results of this year's 'Top concerns survey' (see Chris West's article also in this issue of Focus).

After all the other usual formal business was completed, Jane formally thanked Toby Bainton for all his hard work as SCONUL Secretary with a few words, promising a lot more words in the evening. The out-going Chair then handed the baton to the new SCONUL Chair, Fiona Parsons, who thanked Jane for her inspirational leadership over the last two years.

As promised, the evening saw a reception in honour of **Toby Bainton**, the retiring (as in leaving, not as in 'shy and ...') SCONUL Secretary. The conference delegates all squeezed into the Ark Royal room to hear observations from host Biddy Fisher, the President of CILIP (Chartered Institute of Library and Information Professionals), and past SCONUL Chairs Jane Core and Andrew Green. Biddy started the proceedings by reflect-

ing on Toby's networking and his role in bringing about closer working between SCONUL and CILIP. Next up, Jane appraised Toby's national work, work with members and the solid support he always gave to the board. Finally Andrew talked of 'Mister Copyright's' international work and how he had made SCONUL a global brand. As an after-dinner speech Frode Bakken continued with this theme of Toby's international activities. First, though, Toby was presented with a beautiful David Hockney print. He thanked SCONUL for this lovely present and reflected that although he had been forced to travel to many exotic places in the last 15 years and lecture the world on copyright he had never lectured the SCONUL membership ... until now. Unfortunately time was against us and he instead told a short story about the House of Commons library, an indignant MP and a very funny put-down. He finished by thanking three special people: Gail Downe; 'The Web Team' (SitMui Ng); and 'The Home Team' (his wife), all of whom were presented with long-stemmed roses.

DAY TWO

The second day of the conference started bright and early with **Geoff Curtis** and **Claire Davies** from the Curtis and Cartwright Consulting Group leading a session on future scenarios called 'Academic libraries of the future – having your say'.

The 'Academic libraries of the future' project is a major piece of work exploring future scenarios for academic libraries that is sponsored by the British

Library, JISC (Joint Information Systems Committee), RIN (Research Information Network), RLUK (Research Libraries UK) and SCONUL. Details of the project's background and progress updates are available at http://www.futurelibraries.info.

Geoff Curtiss

Geoff Curtis introduced the morning session by explaining the project's approach and methodology. The project team has already identified the focal issue, analysed the drivers, ranked these by importance and uncertainty and selected the scenario logics. During the morning's World Café conference session, delegates had the opportunity to comment on and help flesh out the three scenarios. The feedback will be used to work out the implications and develop the final strategy document. The three scenarios are stories of possible futures, describing end-states and how we might get there, not predictions. The project team is working to the year 2050, to provide a long-term focus.

Claire Davis

From a series of structured workshops and consultations with stakeholders, including early-career librarians, the focal issue for the project was identified as 'the academic and research library in 2050'. The three scenarios illustrating the possible futures are 'Wild West', 'Walled Garden' and 'Beehive'.

'Wild West'
2050 is an era of instability. Governments and international organisations devote much of their time to environmental issues, ageing populations and security of food and energy, although technology alleviates some of the problems by allowing *ad hoc* arrangements for handling resource shortages and trade. In this environment, some international alliances prosper but many are short-term and tactical. The state no longer has the resources to tackle inequality and is, in many cases, subservient to the power of international corporations and private enterprise. The challenges of the twenty-first century have created major disruptions to academic institutions and

institutional life. Much that we see as the role of the state in higher education today has been taken over by the market and by new organisations and social enterprises, many of them regional.

'Walled Garden'
Following the global recession of the early twenty-first century, cuts in investment levels to help reduce the national deficit meant that, internationally, the UK's influence waned and it became ever more isolated. Indeed the UK drifted from the European Union, particularly after the euro collapsed in the century's second global recession and the UK itself fragmented as continued devolution turned to separation and independence. Fortunately, the home nations have achieved reasonable self-sufficiency. Technological advance, whilst allowing some of the challenges faced earlier in the century to be overcome, has also brought its problems. The ability for people to connect with like-minded individuals around the world has led to an entrenchment of firmly held beliefs, closed values and a loss of the sense of universal knowledge. This has resulted in a highly fragmented higher education system, with a variety of funders, regulators, business models and organisations that are driven by their specific values and market specialisation. However, 'grand challenges' of national importance go some way to galvanising the sector.

'Beehive'
The need for the old EU countries to maintain their position in the world and their standard of living in the face of extensive competition from Brazil, Russia, India and China (the BRIC countries) has led to the creation of a European Federation (EF) under the treaty of Madrid, in 2035. The strength of the EF has meant that values in it have remained open, in the long tradition of Western democracy and culture. In the years leading up to 2050 the world became increasingly competitive; the continuing economic progress of the BRIC countries and their commitment to developing high-quality higher education systems has meant that even high-tech jobs are now moving from the West. On a worldwide scale, and especially in the US, UK and Europe, employer expectations now dictate that virtually all skilled or professional employment requires at least some post-18 education. In the UK these drivers have resulted in a state-sponsored system that retains elements of the traditional university experience for a select few institutions while the majority of young people (the 'worker bees', if you like) enter a system where courses are so tightly focused on employability they are near-vocational.

A two-page briefing document on each of these scenarios was available to delegates who moved round the tables to discuss them, led by a facilitator. The global environment, UK context and organization of learning and research were set out for each scenario and delegates considered what information services, content and skills would look like in each one, while taking into account the information needs of users, who would provide what and how it would be provided. The facilitators led discussions on a number of more specific questions about information provision, professional roles, information supply chains connecting users with content, how information services would change and what factors would make each scenario likely to happen.

The discussion sessions were lively and participative, though it was possible to detect a certain air of despondency as the morning progressed. Geoff summarised the feedback later in the morning programme. It was felt that the information services provided in the 'Wild West' and 'Beehive' scenarios would be broadly similar, whereas 'Walled Garden', with its small number of centres of excellence, would be very different. This scenario could happen as the result of severe year-on-year funding cuts, and was felt by many to be a retrograde step for UK higher education, described variously as ' Gormenghast' and the death of freedom. Information professionals would be very embedded in individual institutions, more like consultants in commercial organisations, and shared professional values would be challenged. The 'Beehive' scenario might result in two communities: a small number of research-led institutions concentrating on traditional activities and physical assets alongside a much larger number of institutions providing vocational courses in a very different way, mainly through online delivery. Jobs in the 'Beehive' scenario could be envisaged as 'information choreography' as a result of the blurring of boundaries between the public, private and heritage sectors. In the 'Wild West' scenario, with its fragmented, largely outsourced and privatised environment, there would be a great deal of innovation but inevitable casualties. Education would be seen as a commodity driven by market forces and consumer choice. In 'Wild West', information professionals would hold an information-broker role, facilitating rather than supporting, with skills in areas such as e-learning and marketing. Library spaces might turn into regional study centres run by facilities managers and, as one person remarked, we might all be working for Google.

This is a complex topic which the consultants succeeded in presenting in a way that focused discussion on the very real issues facing the sector over the next four decades. It was clear that all the scenarios, or a mix of elements from all three, represent possible futures we need to respond to. Although some of the elements were pessimistic, considering them seriously helped the delegates to recognise what we as a profession consider worth holding on to and fighting for in order to prevent the worst predictions from coming true.

The project documents will be made available on the 'Libraries of the future' web site and there is a JISC mailing list for the circulation of updates (see http://www.futurelibraries.info). The final scenarios will be drafted in autumn 2010 and the project will conclude with a final major workshop in spring 2011, to apply the scenarios to strategic planning

The morning session also offered a choice of **parallel sessions** on a variety of themes. As usual, the choice was difficult: 'Do I go to the web 2.0 session, the session on leading subject teams, or the session with new entrants to the profession sharing their hopes and fears?' To help address this, a variety of colleagues have contributed reviews elsewhere in this article.

After a light lunch we were offered a variety of **excursions**, ranging from a visit to the Red House, Gomersal and Huddersfield University Library and Computing Centre, to the Leeds Library and 'Harvey Nicks' (as the absolutely fabulous option sheet called it). Other choices were available and your in-coming editor chose the Royal Armouries (perhaps appropriate for the times we face ahead), whilst your soon-to-be-ex-editor chose a visit to the Brontë parsonage (perhaps appropriate for reasons of literature ... and soon becoming 'ex-'!).

The visit to Haworth took about 45 minutes through some stunning Yorkshire countryside. On arriving at the picturesque village we were greeted by our host, who ushered us into the basement of the parsonage for a slide show about

Brontë Parsonage

the Brontës. Despite the group's jolliness (many of us were genuinely excited to be at this important literary home) the story of the Brontës was somewhat thin on laughs. Their penchant for fantasy was hardly surprising, given that their real lives seemed to feature death, death and more death. Hints at madness and Branwell's alcoholism felt like light relief under the circumstances. After this introduction we were set free on the parsonage. As well as highlighting the scenes of these various early deaths, the house contained examples of the sisters' writings and Branwell's artwork. The somewhat whirlwind tour over, we ventured out into the sunshine of the graveyard and then all too quickly got onto the bus back to Leeds.

The trip to Haworth was so captivating that we barely got back in time for the **reception** and **conference dinner**. This was to be held at the University of Leeds, which meant a coach trip up the hill to the august Brotherton Library.

Margaret Coutts, University Librarian and Keeper of the Brotherton Collection at the University of Leeds, welcomed us to the university library and also to the library's magnificent art gallery and the fantastic new Marks and Spenser archive. Delegates spent a happy hour viewing the tremendous artworks (my favourite is Maurice de Sausmarez's painting of Whitelocks, the pub in the Turks Head Yard in the town centre) and pondering the many delights of the M&S archive. The sound of librarians trilling 'I

remember them' became common. And we never thought you could become nostalgic for your mother's 1970s knickers!

Some of us had to be dragged away but we were soon marching across the campus to a building with a blue plaque on the side. Is this where a new compound was discovered or a new theory first

expounded? Far more important than that: this was the refectory, where The Who recorded *Live at Leeds*. Some of us were even more excited than at being in Haworth parsonage. Over dinner we were not serenaded by four maniacs, though, but by a string quartet. Rumours that the cello player later threw a TV set out of her hotel window remain unproved ...

Day three

The final day of 2010's conference kicked off with the second set of **parallel sessions**, some of which are covered elsewhere in this review. Your outgoing editor attended David Kay and Ken Chad's update on the SCONUL shared services project. The hour-long session was highly informative. Rather than reinventing the wheel, readers are directed to your in-coming editor's review of the day-long SCONUL event on this project (which took place on 19 May), elsewhere in this issue.

Once all the delegates were assembled again in the main hall, **Mike Mertens**, Deputy Executive Director of Research Libraries UK, delivered a talk about the RLUK/JISC resource discovery vision.

Mike began by asking us about our perceptions: 'Think about cataloguing – what is the image you have?' He then went on to change this mental image by first reviewing the past and the movement from local catalogues to Copac, the Archives Hub, Inform25 and SUNCAT, and then by offering opportunities for the future ('How can we develop coverage and make use of new technologies such as mash-ups?').

Mike then reviewed more recent projects, focusing on the move to get 18 new libraries into Copal. The issues to come out of this – questions about scalability; the fact that considerably more than 18 institutions wanted to join; and what Mike referred to as 'format hell': catalogues in a variety of formats that would not speak to each other – prompted JISC to take action. In 2008 JISC approached RLUK to work on a project to enhance resource discovery in the UK.

The brief was:

- to enable UK education and research to be world-class
- to be interoperable and flexible
- to reduce duplication of effort
- to be sustainable
- to be simple to adopt
- to be integrated in web and future global structures
- to be coherent, compelling and usable
- to be robust and scalable
- to be achievable.

To start on this path RLUK reviewed what is good about UK discovery tools and the delivery of library (and related) resources. The answers were:

- services
- quality
- national coverage
- the inclusion of archives.

With regard to what is bad about the current situation, the following were reported:

- services
- fragmentation
- lack of coverage/resources.

So what needs to change from a user's perspective?

- services
- 'Google could do it better'
- access
- delivery.

... So service development seemed pretty much a given.

Mike then detailed the project which will start in August 2010 and run until May 2011. The vision is to enable UK higher education to implement a fit-for-purpose infrastructure to underpin the consumption of resources held by libraries, museums and archives for research and learning. The model of delivery will involve libraries supplying data to feed a search engine to be accessed by end-users. More technical details can be found on Mike's slides, on the SCONUL web site.

After coffee we were introduced to the final speaker, a familiar face to the SCONUL conference (not to mention the whole of the sector): **Charles Lowry**, Executive Director of the Association of Research Libraries. Unsurprisingly, his theme was to be the economic crisis and how to survive it.

In his introduction to 'Year two of the "Great Recession": surviving the present by building the future', Charles apologised for bringing gloomy news from the USA to the conference, stating his belief that we are all facing the most difficult fiscal challenge of our careers in a financial climate worse than anything in the past 75 years. The Association of Research Libraries (ARL) is facing up to this challenge by actively monitoring the effects of the economic crisis on its 125 member institutions and by engaging in a programme of scenario-planning to support the transformation of research libraries.

Scenario planning

The last two ARL member surveys revealed that most libraries expect either flat funding or budget cuts for the foreseeable future. The impact will spread beyond libraries into the whole of the

scholarly publishing market and outwards into the commercial sector. The majority of libraries anticipate cuts ranging from 0% to 22% in budget allocations and a reduction in endowment income. In 2008/09 the key areas for cuts were staff and operations but there is now an observable increase in acquisitions cuts. The pattern is not uniform and different parts of the scholarly publishing industry will suffer differentially. 49% of member libraries expect further reductions in 2010/11, which indicates that there will be very limited capacity for price rises in the near future. The scholarly communications market was already unstable but the need for change has now been accelerated by the economic crisis.

ARL has recognised that radical thinking is required to meet future challenges and has embarked on a programme of information-gathering and strategic planning leading to formative action. A selection of the latest and most forward-looking work is available on the ARL web site at http://www.arl.org/rtl/plan/index.shtml. Some of the proposals may not seem radical at first sight, but they signal fundamental changes in the way that research libraries will operate, including the elimination or reduction of investment in traditional routines in order to undertake new work. There is a risk that patrons will see such changes as an abandonment of the core mission but, as Charles stated, 'I believe we have reached a fiscally driven tipping point.' Examples of change might include: shifting staff resource from externally acquired content to internally created or unique digital resources; taking steps to avoid duplication in collection development; and recognising the decline in activities such as circulation and reference and dropping these to develop the new pathways to information that we have created.

Part of the work of ARL will be to redefine large-scale strategies for the delivery of information. The question of ownership of collections will be considered, looking at possibilities for increased national co-operation. The historic library model and standard budget processes will have to be adapted and new models of service delivery developed. It is likely that there will be large-scale digitisation of legacy collections, with monographs drawn into the same process of change we have experienced with e-journals, which has significant implications for the publishing infrastructure. Multi-institutional collaboration has been important up to now, but has not been a game-changer: developments such as the forthcoming Google books settlement, which cannot

exist without the co-operation of participating libraries, will provoke very significant changes in the e-books infrastructure.

Charles provided a number of examples of collaborative activities that provide useful models for future activities:

- The Hathi Trust (www.hathitrust.org) is a collaboration of 13 institutions in the American Mid-West, aiming to create a co-owned and -managed digital archive to improve access to content, reduce costs and provide for long-term preservation.
- The 2CUL project (http://2cul.org) is a partnership between Columbia and Cornell Universities, aiming to integrate a number of activities such as cataloguing, e-resource management, collaborative collection development and digital preservation.
- Duraspace (http://duraspace.org) is a non-profit organisation providing leadership and innovation in open-source and cloud-based technologies based on DSpace and Fedora.
- The Cooperative Collection Management Trust pilot, led by OCLC (http://www.oclc.org/productworks/ccmt.htm) aims to help libraries reduce the cost and footprint of physical collections while maintaining access to the content.

ARL has an important strategic role to play in securing the future of research libraries and helping to protect scholarly communications activity. The way forward cannot be based on preserving old ways of doing things and we must be prepared for a time of complete transformation in all our activities. ARL is keen to make connections with other similar organisations, develop the international conversation and share work such as scenario-planning to help shape the way forward.
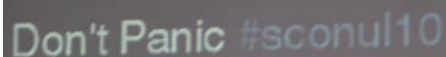
These are obvious opportunities for SCONUL.

Fiona Parsons, the in-coming SCONUL Chair, brought the conference to a close by drawing together what she saw as the main themes to emerge over the last three days. The strongest messages seemed to be:

- We need strategic leadership at both institutional and sector levels.
- Out of adversity comes creativity – we need to seize opportunities.
- Where do our ideas come from? Where is our Red Adair? Sometimes we need to look in unexpected places.

- We need courage.
- Command is timeless.
- What does leadership mean to us … especially at the moment? We need to recognise a problem in its entirety; we need to look at the bigger picture.
- We need to take a long-term view about cuts.
- We need to have clear priorities.
- We need to innovate … but also stick at core activities.
- We need to communicate even more than ever, with our staff, customers, stakeholders…
- We need financial consolidation.
- We need to 'keep calm' but not just 'carry on' – we need new thinking.
- With regard to future leaders, more is expected of leaders than ever before.
- In the future we could be:
  - worker bees
  - gardeners or weeds
  - gate-keepers
  - feral librarians
    guardians of a trusted brand.
- To lead effectively in the future we need to focus on:
  - needs at institution level and 'above campus'
  - shared services
  - collaboration
  - providing access to information and content
  - working the space harder
  - radical thinking
  - avoiding complacency – listening to others.

Fiona finished by reviewing our 'top concerns' and reminding us that SCONUL is focusing on the above with its objectives. SCONUL is in a strong position to support the sector and support individual members. Her final words?

'Don't panic!'

Parallel sessions

'SHARED ACCESS – AN ESSENTIAL BLOCK IN A TIME OF FINANCIAL RESTRAINT'

Led by: Philip Payne, Librarian Birkbeck University of London
Reviewed by: Gurdish Sandhu, Associate Director, Library, University of East London (g.sandhu@uel.ac.uk)

Higher education is facing major challenges such as budget cuts and high demand for resources and services. Philip, who is also Director of Inspire, posed the question, 'Is it the time to work with each other or to work alone?' He further added that these cuts are not only experienced by UK libraries but also by US libraries. However, the sector is exploring the possibility of using shared services to reduce costs. Some of the shared services initiatives are:

- shared access
- regional and local schemes, such as the 'Welcome' service in Kirklees & Calderdale (http://welcome.hud.ac.uk/)
- Inspire London
- higher education and health libraries access schemes
- joint and shared libraries – for example, Senate House Library, London University, can be considered as a shared service used by its colleges
- the Birkbeck and the University of East London arrangement, involving shared space (Birkbeck staff and collections located in the UEL library); courses taught at UEL campus; Birkbeck and UEL staff serving both groups of students
- UK Computing Plus
- HAERVI (HE Access to e-Resources in Visited Institutions; see http://www.ucisa.ac.uk/members/activities/haervi.aspx)
- WAM25 (Walk-in access to e-resources).

Philip emphasised that there are five good reasons for opening up access to a library:

1 widening participation
2 supporting the institution's community and business innovation initiatives, such as access for teachers, social workers and the business community
3 financial benefits to the library and institution, including income from photocopying and print charges; cost savings through

economies of scale; cost-effectiveness through working collaboratively on student recruitment, student retention and so on

4 co-operative arrangements benefiting students and staff

5 helping to justify the library's existence through increased usage at a time when library visits have declined by 15% over the last three years.

There are certainly some constraints that are preventing us from embracing shared services; for example, opening access to electronic resources may be seen as a threat to an institution's competitive advantage and it may not be a priority for the other institution(s). Then there are the barriers of licensing restrictions, the number of work stations available and fear of misuse of computing facilities.

The British Library and Higher Education Libraries working group are looking at the following issues and initiatives presented by shared access:

- Does shared access put pressure on services, for example the British Library's St Pancras reading rooms and other higher education libraries?
- Do shared services provide the opportunity to share information and expertise?

Inspire London (http://www.londonlibraries. org/inspirelondon) is a shared service offered by London's public and HE libraries and the British Library.

The large number of delegates who signed up for the workshop showed the level of interest in shared services. People felt that there is a need to make a real shift to sharing electronic resources but they feel helpless due to licensing and cost constraints.

The session was successful in engaging librarians and raised awareness of shared services.

'Leading a subject team'

Led by: Nicola Wright, Information Services Manager, and Michelle Blake, Liaison and Service Development Manager, London School of Economics and Political Science (LSE)
Reviewed by: Martin Reid, Law Librarian and Academic Support Manager: Social Sciences, UCL Library Services (m.j.reid@ucl.ac.uk)

This was a parallel session given by Nicola Wright and Michelle Blake, which described their experience of transforming the subject liaison team at LSE.

Nicola Wright began by describing the evolution of the traditional scholar subject librarian, first into a role that involved greater systematisation of services and with an emphasis on management and efficiency and now into a softer one of 'relationship manager', which has
a greater focus on the customer. She suggested that there is a need to be clear about the meaning and value of the role of subject specialist (however designated), because without definition there is potential for a lack of focus and purpose, which would be particularly dangerous in a time of cuts.

She went on to identify the value the role adds to the library service at LSE as being:

- understanding user needs and behaviours
- building strong relationships with academics and, through them, with students
- possessing knowledge, ideas and creativity enabling tailored services to be developed.

She described how the liaison librarian team at LSE had been re-focused onto the key areas of people and collections and the services necessary to connect the two. This had involved moving away from a model in which everyone tried to do a little bit of everything and to one in which they concentrate on the things that each is best at, everyone being given a different area to concentrate on. Team members had to give up some tasks and were encouraged to be flexible and creative. Greater attention was given to collection-development as a core activity and the e-services role was expanded from one person into a team.

The issue of lack of co-ordination in liaison activity was addressed by the creation of a new role of liaison and service development manager, designed to develop ideas and services within the team and actively promote them across the institution, engaging in a cyclical process of listen-

ing to users, developing ideas, promoting them and then listening to feedback. The holder of this role, Michelle Blake, then described how she had engaged with the liaison team to develop ideas for new services.

Taking the example of the provision of an enquiry service, she emphasised the importance of evaluating an activity in the light of accurate and detailed evidence combined with qualitative feedback from users, and described how the compilation of detailed statistics had enabled her to undertake a cost–benefit analysis of an enquiry point. This resulted in the team's withdrawal from that service, enabling its members to concentrate on more effective liaison activity.

The session ended with a lively group discussion of the training and development needs of subject librarians. Key areas identified included:

- marketing skills
- assertive and influencing skills
- strategic awareness
- business planning and writing
- statistical analysis.

'A TALE OF LEADERSHIP DEVELOPMENT'

Led by: Linda Carter, Director of Chrystallise Consulting and Course Director of the Future Leaders Programme
Chaired by: Liz Jolly, Director of Library and Information Services, Teesside University
Reviewed by: Nicola Wright, Information Services Manager, London School of Economics and Political Science (N.C.Wright@lse.ac.uk)

Using stories and metaphors, the workshop's leaders encouraged the audience to reflect on the nature of leadership. We considered a range of leadership topics and heard how these are covered in the Future Leaders Programme. We had fun when we were asked to think about what sort of garden our library is and why. Several participants made full use of the flip-chart pens and the explanations of water features and bedding arrangements were entertaining and also very enlightening. Liz Jolly shared her experiences of taking part in the Future Leaders Programme. We were left with the motto 'Be yourself with skill.'

(For more on the Future Leaders Programme see Antony's article elsewhere in this issue of *Focus*.)

'WE ARE THE NEXT GENERATION SO DO NOT MESS THINGS UP'

Led by: Rachel Bickley, Jackie Shaw, Simon Wakeling and Joe Kendal, library school students and recent graduates
Chaired by: Jo Norry, Director of Libraries and Learning Innovation, Leeds Metropolitan University
Reviewed by: Antony Brewerton, Head of Academic Services, University of Warwick (antony.brewerton@warwick.ac.uk)

Well, could I *not* attend an event with a title like that?

Let me start by explaining a little about the speakers. Jackie is currently a library school student and Joe is a graduate trainee at Leeds Metropolitan University. Rachel and Simon are currently library school students at the University of Sheffield. To put it bluntly, the audience looked at the profession's future. To put it more bluntly, the speakers gazed out at its past.

The session, chaired expertly by Jo Norry, consisted of four short talks followed by a question-and-answer session.

First up was **Rachel Bickley**, who identified four main themes for the future. Space-management will become more of an issue and we will need to develop different spaces to support different learning styles. As information becomes predominantly electronic we need to use this to influence stock-selection and service-provision: Rachel envisaged that we could even live in a world where the library becomes an 'e-library' with no books, no enquiry desk, just computers. This will also affect the role of academic support librarians, who will need to be more embedded online … and perhaps qualified as teachers. Finally, with students as consumers we need to demonstrate more value for money. We need to find out what the students want and satisfy their demands.

Jackie Shaw continued with some of Rachel's themes in her presentation, starting her talk with a slide of a bemused cartoon character saying 'Someone calling themselves a customer says they want something called service.' Higher fees will lead to greater expectations. Students will expect a return on their investment. They will also expect a service that is nearer to Google and Amazon than any long-held views of what libraries are all about. We need to take the convenience of the big internet names and marry them with the quality libraries have always offered. We need to also change students' views of libraries. If we don't

protect our role, others will take it away and take our funding as well.

Given that his MSc is in electronic and digital library management, it was little wonder that **Simon Wakeling** focused on trends in technology. What do we need to keep an eye on now? Web 2.0, mash-ups, primacy of e-delivery and (hence) changes in demand on the physical space are some of the themes that we should be focusing on now. But in the future? Simon's list includes:

- Will the semantic web happen and how will it affect us?
- What role will there be for us in the curation and re-use of learning materials?
- If the library becomes decentralised, where does the librarian sit as part of the learning process, part of the institution?
- What will the role of the publisher be as scholarly communications models change?
- Ultimately, what is the relevance of the library and how do we preserve the library brand?

Simon ended with an interesting comment to his audience: 'My course may look weird to you but our values are the same.'

Last up was **Joe Kendal**, who promised a 'personal perspective' on the workshop title. Employing a cheeky yet effective style, Joe took some well-aimed shots at his audience:

- Keep the professionals professional – we need to keep developing our skill sets, keep up with user needs, keep developing services with other stakeholders, be more outward-looking and shout more about what we do.
- Keep yourselves professional – you are the ones who will be 'going out to bat for us' (to secure funding, etc.), so make sure you are 'in good nick'.
- Keep our values – how we do things may change; why we do them never will.
- Keep us valued – communicate to the Vice-Chancellor what we do and why.
- Don't sit behind your desk until you retire – get out there … and support your staff to get out there.

Consider yourselves told!

These four excellent presentations were followed by a question-and-answer session, which covered the perceived relevance (or not) of CILIP to younger professionals; the effectiveness (or not)

of library school training; and 'Are you concerned you will be held back by the old, erm, "librarians" who won't retire?' (Well, that is my Bowdlerised version of the question.) A lively discussion ensued.

Sadly we ran out of time – it seemed that everyone in the audience wanted to hear more from these four. Given their passion, commitment, ability and style, I am confident we will hear a lot more from Rachel, Jackie, Simon and Joe in the future.

'NorMAN out of hours helpline – growth from a regional to national shared service'

Led by: Trevor Cornwell, Chair NorMAN Management Board
Reviewed by: Valerie Stevenson, Head of Research and Learner Support, Library and Student Support, Liverpool John Moores University (V.Stevenson@ljmu. ac.uk)

The NorMAN (North-East Metropolitan Area Network) service was set up to provide out of hours end-user support after analysis of usage figures showed that students were using IT services right through the night. Initial costings demonstrated that it is probably not cost-effective for a single institution to set up and run an out of hours support service and the original regional model, led by Northumbria University, was developed with project support from JISC.

The NorMan service provides first-line support for IT and library enquiries for both staff and students, from 5pm to 8am on weekdays and 24 hours over weekends and public holidays. The service is operated as a partnership with members' own daytime services, with the ability to escalate major systems failures to on-call teams. Calls to the institution's regular helpline are diverted to the NorMAN freephone number at an agreed time and are logged throughout the night then passed back to each institution in the morning. Callers will not normally be aware they are calling a different service and it is up to each institution how it advertises this.

After the first two years of local operation in the North-East of England, a business case was developed to show that there was sufficient demand and overall benefit to the sector to bid for HEFCE (Higher Education Funding Council for England) shared services funding to expand the service.

There are currently 25 subscribers throughout the UK (potentially 473,000 users), with several more institutions going through the joining and set-up process. There is a one-off set-up cost of £2,000 and an annual membership fee of £20,000, a significant saving to each institution compared to the cost of running its own service. Collectively the volume of calls is sufficient to make the service worthwhile, which would probably not be the case for individual institutions.

The hours from 6pm to 9pm are busiest and the statistics show that calls increase as users get used to receiving an immediate answer. In 2009 the NorMAN service handled over 25,000 calls and this is expected to have increased in 2010. The nature of calls mirrors daytime enquiries, the most frequent topics being user accounts and network access, especially from halls of residence. The 'library' calls most frequently relate to opening hours and payment of fines. The percentage of calls resolved varies between institutions, depending on the access granted (for example, for password reset) and whether there have been any serious local network problems, but is typically 70–80%. A user-satisfaction survey carried out in October 2009 indicated that the service is highly valued, especially by distance learning students, and the overall satisfaction rating was 83%.

Full details of the NorMAN service are available at http://www.outofhourshelp.ac.uk.

'WHAT DO TOYOTA AND THE BRITISH LIBRARY HAVE IN COMMON?'

Led by: Andy Appleyard, Head of Document Supply and Customer Services, British Library
Reviewed by: Steve Rose, Head of Library and Learning Services, Southampton Solent University (Steve.Rose@solent.ac.uk)

Andy Appleyard presented an insight into the benefits of deploying a 'lean management' approach within any organisation, be it in the public or private sector. He drew on his experience of working for Toyota and compared it with his current employer, using illustrations and comparisons to demonstrate its interoperability.

Whilst noting some clear distinctions between the two organisations (public/private; manufacturing/service), he highlighted similarities. Both are concerned with budgets, processes, staff and customers. The 'lean management' model devel-

oped at BL focuses on some of these similarities. For example, it includes:

- delighting customers by putting them at the core of the operation
- eradicating waste and non-added value in processes and workflows
- ensuring that every BL member of staff has a positive role to play and is involved and engaged in the change process.

Andy noted how the drivers for change within BL could also be compared to those in a company like Toyota. Using document supply services as an example, he showed how BL needed to respond to:

- the challenge of maximising income when there is a decline in demand
- the need to become competitive and innovative
- the importance of holding on to existing customers.

Andy went on to describe the 'continuous improvement programme' that had been introduced at the BL. Central to this was the concept of building a 'lean house' whose foundations are laid on the principles of putting the customer first, eliminating waste and engaging with staff. The next level of the building focuses on consumption control processes – designing services that deliver on time, with customer needs at the forefront. The house is completed with the roof, represented by continuous improvement (CI). Andy noted how the key CI ingredients are the same at both BL and Toyota:

- key performance indicators (KPIs)
- targets
- robust measurement tools.

He noted how the CI model, if it was to become 'lean' and successful, had to overcome a number of barriers to change that can be endemic in any organisation – public or private – and can potentially threaten its survival. These included a move from traditional ways of working to the willingness to adopt new approaches, a shift in management culture from command and control to inclusive, engaging leadership and a shift from a 'silo' view of the world to one which is process-based.

Specific examples of change at the BL were given as a result of implementing the 'lean management' model. These included reducing the number

of steps (initially 15) in the customer registration process and making better use of space by re-designing workflows and designing unique workstations, within a limited budget, to improve productivity and create additional storage space.

It seemed that the comparisons between the BL and Toyota offered an interesting angle on the presentation, but the real relevance was the insight into how the BL had tackled continuous improvement, the drivers behind this change and the demonstrable benefits this had brought. There was discussion amongst participants about the value of adopting similar models, for example the government's customer service excellence (CSE) model for public-sector organisations. The presentation and discussions were timely in the current and medium-term climates we face, with the challenges of budget cuts operating in a culture where the student experience has to be at the forefront.

Leeds War Memorial & Town Hall clock