SCONUL shared services community event, 19 May 2010

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The SCONUL shared services study was launched formally at this event with presentations from members of the project team, steering group and representatives from the Joint Information Systems Committee (JISC) and Research Libraries UK (RLUK) who had taken part in the consultation process. The presentations and the full text of the final report are available in the shared services area of the Higher Education Library Technology wiki at http://helibtech.com/Shared+Services+Community+Event.

Fiona Parsons, vice-chair of SCONUL, outlined the context for the event and reported that a robust business case for funding a shared services initiative had been presented to the UK Higher Education Funding Council (HEFCE) in December 2009. Since then, the volatility in the financial and political climate meant that the report had to be delayed. Although there are still many uncertainties, this event provided an opportunity to explore how change can be achieved in a very new landscape and how the work can be taken forward.

On behalf of the steering group, Anne Bell thanked everyone who had contributed to the study and stressed the importance of considering the report in the wider context, taking into account the current financial climate and ongoing work on the future shape of academic libraries. So far there has been no written confirmation from HEFCE about funding, although the steering group is not optimistic that the project will be funded by them. Things are still very uncertain, however, and in the discussion at the end of the session it was recognised that SCONUL will need to be clear about the key objectives and respond

to a rapidly changing environment in order to take advantage of opportunities to make progress.

THE BUSINESS CASE FOR SHARED SERVICES

David Kay, of Sero Consulting, introduced the business case for shared services and outlined the proposed direction of travel. The project team concluded that there are opportunities to develop a shared services response within the current information landscape, particularly when the original library management system (LMS) focus is redefined as library systems in the broadest possible terms, to include all aspects of information provision. Responses from the sector indicated that there are three main areas of interest for shared services: e-resource licensing; e-resource management (ERM); and general cataloguing. The current situation, particularly relating to e-resource licensing and management, was described as a 'brownfield mess with greenfield opportunities', with respondents reporting high levels of duplication of activity in these areas and dissatisfaction with the currently available commercial products. The key recommendations of the study are presented in diagrammatic form as a platform for progress (see Figure 1) with three domains or phases. Domain 1, electronic resource licensing and management, was identified as the richest area for immediate action which, if successful, would provide the right environment and platform on which to develop the second and third domains. The business plan covers a period of five years, and requires investment of £8.25 million in the first four years. The projected yield over the first ten years of shared services operation is projected conservatively at £88.4 million.
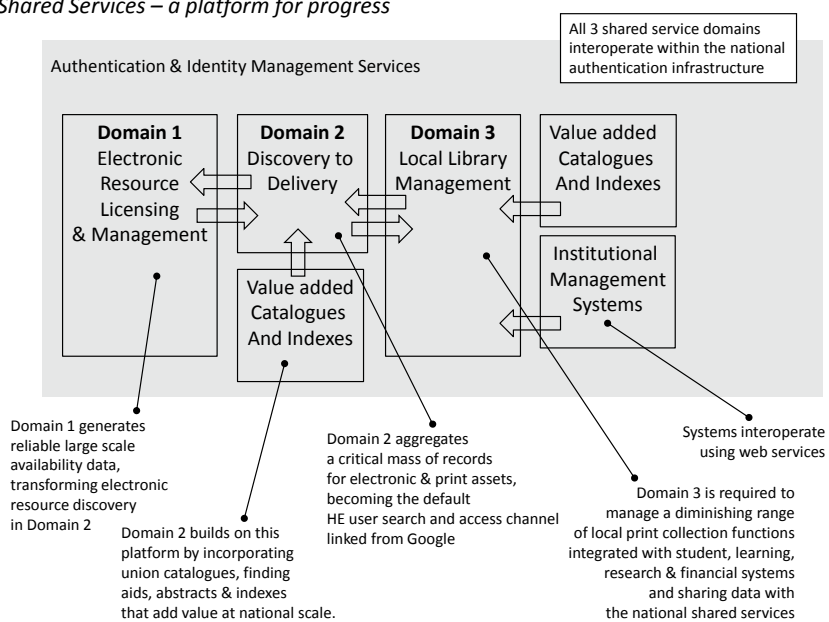
JISC RESPONSE

Rachel Bruce, acting director, e-infrastrucure, JISC, welcomed the study as very relevant to current JISC objectives and highlighted the various work currently in progress that maps onto the shared services proposals. The resource discovery task force (RDTF) reached similar conclusions relating to the need to reduce duplication, provide network-level sustainable access, develop an infrastructure that is responsive to change and enable personalisation. The work of the RDTF offers an approach to working towards a common framework but it does not state how this should be achieved and the shared services study could offer exciting opportunities to work towards this. The common goal is sustainable access to scholarship and it is recognised that painful decisions may have to be taken to achieve it.

THE PLATFORM MODEL

Each of the three domains in Figure 1 was described in more detail by members of the project team. ERM was selected as the core area for development in response to the feedback received during the consultation process. Many libraries reported that current ERM systems are not well regarded because of the amount of time required for data entry, the duplication of effort by skilled staff in each institution relating to rights management and the inefficiency of cataloguing local electronic resources. The shared services model could provide a core of national-scale licences and framework agreements, reducing the proportion of locally managed content. Savings would be generated by reduced licensing costs, more efficient workflows and better exploitation of usage data to assist with decision-making. If domain 1 was successful, a number of discovery and delivery services could be linked to it in domain 2. There is already a great deal of activity in this area, such as union catalogues (COPAC, SUNCAT), table of contents services such as ZETOC and work on resource discovery. Additional benefits could be achieved by linking discovery tools to the central core

Shared Services – a platform for progress

Figure 1

resources, eliminating the need for individual users to go through local systems. Mike Mertens from RLUK supported the principles of data freedom and highlighted the gains to be made from the liberalisation of bibliographic data, noting that researchers could benefit from the convergence of collections to provide a larger set of holdings data, including institutions from outside higher education such as museums and research centres. Ending his presentation with a slide from William Blake, he concluded that 'if we cleanse the doors of perception, the data will follow'. Domain 3 of the model addresses the local management of resources. The project team recommends that it is desirable for current library management systems to be de-coupled and become more interoperable, using standards developed by the user community. A number of initiatives in this area were identified, including the work being carried out in the US by the Kuali Foundation. In the discussion that followed, it was recognised that past work on standards has sometimes resulted in over-complexity and it would be desirable to aim for WC3 (World Wide Web Consortium)-like standards that would be compatible with any system. The project team have established that for around £1 million the software to provide a good national ERM system could potentially be developed and this should be achievable within the community even if funding for the full project is not available.

Panel discussion session

David Ball chaired the final session, aiming to establish from the delegates whether there was general agreement with the concept of shared services, whether the model was considered appropriate and potential ways forward. The points raised during the discussion included:

- There is general support for the idea of shared services and we should take the opportunity to shape the agenda, not risk it being imposed. Is there a risk of a shared service approach removing competitive edge from individual institutions? The concept of 'co-opetition' could address this – individual institutions would benefit from sharing core activities and concentrating on their competitive edge at the local level.
- Some institutions may well wish to retain their existing LMS as the cost of migration is high. If a standards-based approach is adopted, institutions could preserve their existing investment while taking advantage of collaborative efforts in ERM.

- In a shifting political context, the way forward needs to be an iterative project that is nimble and flexible and has the potential to change with funding regimes.
- Organisations such as JISC, MIMAS, and EDINA could have a key role in domain 3, presenting the content for institutions to use in their own way. We should build on what exists already, not try to replace it.

In summary, there was a great deal of support for the concept and enthusiasm for the 'jigsaw' model. It was felt that even in the current funding climate there is a great deal of work that could be taken forward.

Conclusion

Summing up, Fiona Parsons reflected that this event marks the end of a complex and fascinating piece of work that has raised difficult issues and put forward big ideas. The key messages from the day's discussions are that there is clear confirmation of the direction of travel and it is agreed that ERM, which has the potential to unlock change across all three domains, is the right place to start. The discussion of shared services underpins the current thinking on the shape of the libraries of the future and provides some of the building blocks. We have a strong history of collaboration and can draw on this past experience to meet the current challenges. The deceptively simple diagram expresses a very complex landscape but we now have confirmation of the starting point for the next phase of development.