

Section 6 - Reference Group Feedback

Contents

6.1	INTRODUCTION	81
6.2	COMMUNICATION AND DIALOGUE.....	82
6.3	HISTORICAL DEVELOPMENT OF LMS	83
6.4	VENDORS	84
6.5	INSTITUTIONAL CONTEXT	84
6.6	LIBRARIANS	85
6.7	INTERNATIONAL CONTEXT	86
6.8	VISION FOR CHANGE	87
6.9	BARRIERS AND CHALLENGES	88
6.10	OPEN SOURCE DEVELOPMENTS	89
6.11	ROLE FOR JISC, SCONUL AND OTHER AGENCIES	90

6.1 Introduction

6.1.1

To ensure that the LMS study was informed by current thinking in the sector and the perspectives of key agencies, a Reference Group was established of consultants and senior librarians from the UK and international community. The main aims of the Reference Group were to:

- ensure the study is informed by current thinking in the sector and the perspectives of key agencies;
- validate the interim findings;
- inform the work as it progresses; and
- confirm the broad conclusions and recommendations.

6.1.2

Members were asked to comment on the general context of the study, and in particular to help shape questions and issues for further exploration through the library survey and to comment on early findings and interim reports. In particular they were invited to shape and refine the final report and recommendations to JISC and SCONUL.

6.1.3

The members of the Reference Group were:

Anne Bell	University Librarian, University of Warwick and Chair of SCONUL
Kerry Blinco	e-Framework and Standards Manager, University of Southern Queensland and Technical Standards Adviser to the DEST, Australia
Richard Boulderstone	Director of e-Strategy and Programmes, British Library
Peter Burnhill	Director, EDINA, University of Edinburgh
Professor Peter Brophy	Director, Centre for Research in Library & Information Management, Manchester Metropolitan University
Adam Cooper	Assistant Director, CETIS
Professor Jane Core	Director of Library and Learning Services, Northumbria University
Lorcan Dempsey	VP of Research, OCLC, United States
Ian Dolphin	Head of e-Strategy and e-Services Integration, University of Hull
Professor Jeff Haywood	Vice Principal, Knowledge Management and Chief Information Officer, University of Edinburgh
Dr Liz Lyon	Director, UKOLN
Gill Needham	Head of Strategic and Service Development, Open University Library and Learning Resources Centre
Dave Pattern	Library Systems Manager, University of Huddersfield
Andy Powell	Head of Development, Eduserv Foundation
Stephen Pinfield	Chief Information Officer, University of Nottingham
Owen Stephens	Assistant Director: e-Strategy and Information Resources, Imperial College London
Julie Snelson	Director of IT Services, University of Wales, Bangor

6.2 Communication and Dialogue

6.2.1

A secure Moodle environment was established for the Reference Group to engage in discussions, post messages and access documents. This was actively used by several members throughout the study to provide comments on interim reports and other documents posted by the study team, and also for strategic discussions on more general international LMS-related issues.

6.2.2

The LMS study team held a series of initial telephone discussions with members of the Reference Group in September 2007. The main purpose of these interviews was to explain the background to the study and the planned approaches, and to explore with Reference Group members particular issues of interest that might inform the LMS study. The discussions took place concurrently with the Horizon Scan and ongoing vendor consultation exercise. They were not intended to explore or endorse specific findings from these elements of the LMS study, but to provide an opportunity for informal triangulation with these emerging results, as well as an informed and informative 'reality check'.

6.2.3

Respondents were asked to comment on three broad questions:

- What have been the significant changes to university Library Management Systems over the last five years or so?
- What are the main requirements and challenges for library systems at the moment?
- What do you think will be the main challenges over the next five years or so, and what role do you see for development agencies in supporting the profession to meet these challenges?

Discussions were free-ranging within these broad parameters, consistent with the main purpose of the interviews in surfacing the key issues for practitioners and experts. Occasionally, prompts were given and supplemental questions asked in order to explore specific areas in more depth.

6.2.4

Fourteen members of the Reference Group were interviewed. The average interview duration was around 40 minutes, totalling more than eight and a half hours of expert input from the Reference Group. Interview transcripts covered some 30 pages and totalled almost 13,000 words. The transcripts were analysed on an ongoing basis as the series of interviews progressed, and comments were categorised under headings that emerged from the interviews themselves as areas of particular interest and significance to the Reference Group. Each respondent was allocated a number and their comments tagged with this number in the summary document, which showed the extent to which a particular point was of interest to multiple respondents.

6.2.5

A face-to-face meeting of the Reference Group took place in October 2007, and discussed themes and key issues emerging from these interviews as well as the preliminary Horizon Scan and vendor survey. This summary report offers a brief synopsis of the key points made under those emerging headings. These headline issues are illustrated by direct (occasionally slightly paraphrased) comments which represent views expressed by a number of respondents, and/or points that seem potentially contradictory or controversial.

6.3 Historical development of LMS

6.3.1

Most respondents felt there had been a period of great change in library systems over the past ten years. Significant developments in purchasing and acquisition, cataloguing systems, standards and access protocols were discussed. Systems are getting bigger, better and faster.

6.3.2

There seems to be a consensus that the time is right for a fundamental rethink about the systems and processes that need to be managed. Several respondents discussed a context of changing perceptions of what a library collection is and does, including collection and circulation, resource discovery, changes in ownership and control, personalisation and seamless access to resources.

6.3.3

There was also a suggestion of stagnation in some potential development areas, and a sense that while LMS were in many ways ahead of other institutional systems and service areas in their use of technology some ten years ago, other areas and their systems have caught and overtaken LMS.

6.3.4

A key factor in the historical development of LMS is 'lock in' to a particular system or product range, which has had considerable benefits in terms of a single system that meets the needs of the service and its users, but many perceived disadvantages.

6.3.5

Underpinning these comments is a recognition that the world is changing and that libraries need to change too, but without being bludgeoned down a particular road and in a realistic appraisal of the complex systems ecology within which they operate.

Integrated library systems have made great strides and changes over the last twenty years, some good, some tardy... The problem is that the word 'integrated' tends to be defined as a suite of products that knit well for a vendor. Librarians have gone along with this because it offers one single system that does what they need, but this has resulted in getting locked into certain product ranges, and some are not 'best of breed'.

What has been happening is a process of add-ons to achieve key objectives rather than fundamental rethinking of what LMS is about.

Since around 2000 there has been a growth in the perception of the library collection not as something physical that you hold, but as something you organise access to. This represents a major shift in terms of what LMS are doing. A lot of what we do now is providing access to external resources. This changes both the way we manage systems and the jobs we do.

There have been lots of changes in the last ten years, and we are now realising that our systems were not particularly sophisticated. Now libraries are not leading technology developments as they have in the past, instead we are playing catch-up. Information searching has become big business, and the types of material we are dealing with have changed.

Library systems were quite advanced in adopted an unbundled model, but developments in service-oriented architecture have caught up and overtaken them, and we are in danger of being left behind.

Around five years ago there was a sudden realisation that we were out of kilter with the ways people were information searching in the wider community.

6.4 Vendors

6.4.1

Respondents were not asked to comment directly on specific vendors or systems, but some key themes emerged. A recurring issue was vendors perceived as making false promises for their systems, or over-promising functionality that the system subsequently fails to deliver.

6.4.2

There is a concern that vendors seem relatively unresponsive to institutional development needs, and that the small number of providers means that the sector has very little leverage over the system developers. This is of particular significance in the context of the drive for corporate systems integration. There is also a concern that the business models of some LMS providers mitigate against their responsiveness to the development demands of the sector.

You get what you pay for. But some vendors may be guilty of over-promising, so you don't always get what you think you've paid for. They tend to paint a rosy picture.

Libraries are a very tiny part of a big systems market.

Vendors can be unwilling to break out individual services, and this can serve to exaggerate silos within institutions.

Recent upheavals and mergers have impacted on the ability of providers to deliver the developments and functionality we require.

The market for LMS is quite concentrated, there are only 3 or 4 major players, and this makes me nervous about how much leverage we have actually got.

Some providers are owned by private equity groups....this has implications for their readiness to respond to sector needs.

6.5 Institutional context

6.5.1

The integration of the LMS with other business systems was by a long way the most significant institutional issue identified by nearly all respondents. Specifically these systems are the institution's virtual learning environment(s) (VLE), student records, human resource management and finance systems. There was a call for greater mutual understanding of needs and functions across corporate systems and functions.

6.5.2

A key issue for many is the extent to which the advantages of LMS purchasing and cataloguing functions justify continued independence from other business systems in an increasingly integrated corporate systems environment. This particular issue exemplifies a more general perceived tension in the extent to which institutions are actually concerned to embrace the library as a corporate function or are generally happy to leave it to its own devices (sic), and whether librarians wish to retain their autonomy.

6.5.3

Some respondents expressed a particular interest in developing library services as a core repository for all institutional documents and resources, including business information. Technical boundaries between libraries and repositories were identified as particular barriers to change. There has been some subsequent debate on the extent to which the library should fulfil the functions of a corporate intranet in Reference Group meetings and in the discussion forum in GEM.

6.5.4

Inter-institutional collaboration in the procurement, implementation and development of library services was identified as important by some respondents. Examples were offered of both successful and apparently problematic collaborative tendering processes.

6.5.5

There was discussion on the extent to which LMS service needs and expectations vary for different academic areas and subject disciplines, and on the age profile of principal service users.

The LMS is a tiny component in our institutional systems.

The big issue is getting our library as a content system to link not just with the wider world but also to our own VLEs.

We need integration with our corporate finance software...our activity in institutional reports is always behind the reality.

There's been a lot of discussion internally about whether to store learning objects in separate repositories or in the library system... we've also been having conversations about electronic records and paper records and the role of the library as an integrated corporate content management system.

We are moving away from physical stock to increasing our electronic resources. There are challenges in managing this transition, strong tensions between these worlds. The traditional user community is feeling increasingly squeezed...this is partly generational, and partly subject domain oriented.

6.6 Librarians

6.6.1

Some candid reflections were offered on librarians as a professional group, and on the development of the profession. Librarians described themselves as conservative and expressed concern at the apparent dangers in professional development terms of failing to respond to technological innovations and possibilities. There was a suggestion that concern for economy led to a lack of development initiative in some contexts.

6.6.2

Conversely, however, it was reported that librarians have embraced social networking for professional communication in quite a significant way, and also as a group seem to be almost disproportionately involved in immersive worlds such as Second Life.

6.6.3

Some respondents commented that the opportunities presented by technological developments in LMS are actually encouraging the engagement of new, younger professionals who are in turn influencing the scale and pace of developments from within. There was a general awareness that changing user needs and expectations prompt a need to review the nature of the profession itself, and for a concerted community voice.

As a profession we have been supine... we are parochial, there is no national perspective, no common basis for understanding issues and solutions.

Universities do not ask questions about library service, they see the libraries as specialists... there is a conspiracy of silence here because libraries are generally quite happy to retain their autonomy.

The changing nature of information and user behaviour gives rise to some serious professional questions about the business we are, the nature of our expertise, and how

much we are actually in a position to judge what is good for the user. All this prompts questions about how systems should develop.

We tend to resent the money we spend on our systems, especially paying for software to support functionality we think should be standard...but are we realistic about what it costs to do something well?

Librarians are full-on in Second Life, more so than educators.

We have had difficulty keeping good people in the profession, because of salaries and perceptions and how we sell it. But the bright young things are starting to come back.

We need people who can think broadly, can see connections, do the linking thinking... and we need techno-savvy capable information professionals.

6.7 International context

6.7.1

Comments on the international context for LMS development identified the US and Australia as key comparators. It was noted that the US library community is currently also debating LMS development. A key factor in US library development identified by a number of respondents is the role of private benefactors in financing and supporting both infrastructure and content acquisition. It was suggested that the UK library sector is more obviously concerned than the US with efficiency measures and value for money.

6.7.2

Contextual information service developments in the National Library of Australia were highlighted in terms of their potential significance in the UK.

6.7.3

While the UK remains a small player on the world stage, some respondents highlighted the JISC e-Framework for technical interoperability as a positive and enviable development in the international context in terms of an enterprise architecture promoting shared services and common processes. Others were more circumspect about the current and projected significance of the e-Framework for library systems development.

People in the world are doing some fantastic thinking that could lead to some exciting developments. There are some great opportunities if people are prepared to take risks, and really encourage vendors to take advantage of new technology infrastructure developments.

There's been some fighting talk from US institutions who are unhappy with their vendor. This is a key driver for some open source communities.

The Mellon Foundation is supporting work towards a redevelopment of service-oriented architectures for library systems to support research in the humanities.

The UK community is more concerned with efficiency measures and comparison. The US does not have that same sense of public sector value for money.

The rest of the world can learn a lot from enterprise architecture developments in the UK.

We need genuine collaboration on a worldwide scale, to make the most of potential opportunities for development.

6.8 Vision for change

6.8.1

There was a collective will among respondents for concerted and constructive dialogue in the profession about the business processes that a library is expected to manage, as a basis for specifying the optimum system for managing these processes.

6.8.2

A key factor in the vision for LMS development is the changing nature of information searching; with users increasingly expecting intuitive, workflow-related and personalised systems for searching and discovery. There is increasing interest in reviewing models from other sectors and services as a basis for library service development.

6.8.3

There was some discussion about Library 2.0 and the role of library services in supporting the development of, and providing access to, collaborative, web-supported, user-generated content – with a note of caution about the extent to which institutions should attempt to formalise essentially informal communication and interaction methods.

6.8.4

The dis-aggregation of LMS services and integration of components with other corporate systems for learning and teaching, research and administration was an important element in the operational context for change. A wider implication is the emerging drive towards outsourced system provision and records management.

6.8.5

A national push for trans-institutional repositories was also identified as an important element in the vision for LMS development.

We are on the cusp of another big change in what we want from our systems. There is a growing discussion among the enthusiasts and trailblazers that the OPAC is not what people want.

We need to think about changing business processes within institutions. Scholarly processes are changing fast in learning and research.

The thing we have to crack is the LMS as a corporate enterprise system, run as a core corporate activity and not in an ad hoc way by library staff.

At what point do you say you don't need a local catalogue?...I can see potential for a UK national catalogue that implements a powerful search engine filtering to specific libraries, a kind of local WorldCat model-based service you can buy into.

Librarians should not rush headlong into new areas just because they are there. They need to step back and think about the services they offer in a generic sense and where it's appropriate to deliver.

Web 2.0 is a big topic, at the heart is interactivity. It all comes back to ways of surfacing library materials, print and electronic, into people's workflows and environments. We have to find ways to make resources available and accessible, enable people to use content more flexibly, search for information and resources in a more integrated way, using the tools they are comfortable with and not inventing new tools.

One of the interesting things about Web 2.0 is that students may see social networking sites as their domain. The case for institutional or sector involvement in Second Life or Facebook or Youtube is not clear. They don't want grown-ups in there, it's embarrassing.

We're competing with Google. Users increasingly rely on information that's generally available on the web. We need to offer systems they can use intuitively, align the information resource so they don't have to find things by accident.

We need to start from the perspective of the academic user, what they want to see aggregated and disaggregated on their desktop.

People are looking more widely for good ideas to implement, to publishing and distribution models.

The problem is with the LMS as a box, operating on its own server. But it is a series of modules operating together in an integrated way. Why can't I buy one piece of software for cataloguing and another for my OPAC?... There is talk in the profession of a more modular approach, this has not happened yet, but it is in the interest of the suppliers to open things up.

Monolithic systems will be gradually unbundled.

Maybe the traditional integrated library system is not the right way. Libraries want more choice and flexibility, the fundamental idea behind new search systems is that search does not have to be connected to the catalogue, and this opens up new ways of thinking about how data is managed.

People will ask increasing questions about return on investment and accountability. From an institutional perspective we need to demonstrate that our systems are cost-effective. By the same token we need to demonstrate the cost-effectiveness of new economic models using more open source tools, lighter business systems, increasing systems integration.

Over the next five to ten years institutions may farm out email and other business systems. Other people will hold our records in massive resilient machine rooms, and there will be no reason for an in-house LMS.

Books will still circulate, there will still be inter-library loans...new system developments need to take account of core business.

6.9 Barriers and challenges

6.9.1

Respondents identified and discussed a number of key barriers and challenges to developing library management systems and services to meet emerging needs and the vision for change. These include challenges in adapting relatively inflexible legacy system to meet increasing user expectations of flexibility and speed of response. Most respondents highlighted internal capacity and professional development needs to meet changing services and user expectations as a significant challenge, particularly given the perceived speed of change.

6.9.2

Particular challenges were identified with regard to capability and understanding of the technologies underpinning Web 2.0 developments. User skills development in information searching was also identified as problematic. Libraries are exercised by financial pressures and the need to demonstrate efficiency, value for money and return on investment.

6.9.3

Barriers to effective communication between and among various professional groups and agencies across specialist development fields were noted. Libraries are also faced with the challenges in the extent to which it is possible to engage and empower users in planning and implementing system developments. Some perceive a tension and potential danger in institutional interference with the personal learning environment and processes that users develop for themselves.

The 'always beta' aspect of the new web can be a major challenge. There is potential conflict in trying to be dynamic and have the latest software, and at the same time run a robust business critical enterprise system.

In a word, the key challenge is flexibility. Students want to know why it doesn't work like Amazon, show what's available in the local bookshop on campus as well as on the shelf.

We are nowhere near understanding how our catalogues might shift to accommodate user-generated content, folksonomies and community tagging using things like del.icio.us

There is not a lot of discussion around open URL as a technology, as a standard that all systems should support. What we got wrong with the early Information Environment was developing an architecture around a set of standards and protocols that were not particularly web friendly. Libraries need to think about the things they have to expose. Library 2.0 means adopting a set of technologies that are in line with what the rest of the web is doing.

We need to find ways of encouraging the development of information searching skills.

There are financial constraints on HEIs, we can't just throw money at systems.

We struggle at an institutional level to articulate what we want and to explain this to providers.

We need to think about the degree to which the users are able to influence system design, and review our processes for engaging the customers.

Community boundaries can be a major barrier. Learning technologists, librarians, cataloguers, archivists, academics all talk different languages...this is frustrating when trying to develop a converged service.

6.10 Open source developments

6.10.1

Respondents were divided on the significance of open source LMS developments. Most agreed that in the current climate the procurement and implementation of an open source LMS is not workable for most institutions, largely because of the staff capacity and support overheads, but also because the mission criticality of library systems requires users and procurers to have confidence in a robust system. A further complication is the perceived tension between generic systems and over-contextualisation through customisation.

6.10.2

However, there is growing discussion about the potential value of open source alternatives to systems and system components which are not perceived to be meeting current needs. Several respondents highlighted the value of open source developments as a catalyst for systems change through demonstrating possibilities. Emerging software support and business services around open source products are also seen as positive developments for future LMS implementation.

It's not workable, we can't get involved in developing and supporting open source systems...we have to hold down the staff overhead. A big driver in a corporate institution is managing staff costs and we do this by outsourcing technical development and support.

Open standards yes. But we do not want to built it ourselves, that is too resource heavy and relies on too few individuals. Also there is a danger of over-customising, of making systems too institution-specific.

As a comparator, open source development models for e-learning systems are not proven.

It's a brave institution in the UK that would make the jump to open source. But we are more open to this that we were a few years ago...open source systems may be the option of choice for some institutions in two or three years. Senior IT staff are getting more comfortable with using open source software in other contexts.

As a catalyst for change, open source developments can explore possibilities, push the boundaries of mainstream systems... ginger group developments can be really useful. What will make the difference is the availability of external support. Software and business support services have already built up around Sakai.

6.11 Role for JISC, SCONUL and other agencies

6.11.1

The Reference Group identified and discussed some quite specific potential interventions by JISC, SCONUL and other agencies to support LMS development. Almost all respondents specifically identified a role for JISC and SCONUL in promoting communication and networking between and among institutions. A key focus for dialogue is the facilitation of a business process review for libraries to scope the nature of the systems that are to be managed. This involves identifying the problems and specifying solutions, and gathering, articulating and consolidating user needs, workflows and information flows. There is also an identified role for external agencies in forecasting and horizon scanning. A further focus is a future skills requirements specification for library staff.

6.11.2

Strength in numbers and a consortium approach to UK engagement in the international development context was strongly advocated. There was also support for a representative role for JISC and SCONUL in helping to provide a voice and support the development of a UK community with some international weight. A vendor liaison and lobbying role was also suggested, with a view to stimulating suppliers to be more responsive to user needs in the UK HE context. A particular role for SCONUL in lobbying external funding sources was also proposed.

6.11.3

The role of JISC in funding projects to develop models of practice and exemplars of services was noted, and the important dissemination function of accessible reports and case studies. Several respondents also highlighted the importance of JISC work on open technical standards and specifications, shared services and enterprise architecture. Others urged a cautious approach to the development and promotion of a particular architecture in the context of open web developments.

6.11.4

There was also an identified need for some concerted dissemination and awareness-raising to address the extent to which innovative developments actually impact at an operational level in institutions.

Academic library services could get together to develop the ultimate LMS specification, and reach a shared understanding of what we want in UK academic libraries.

JISC has access to expertise that helps people through decision-making processes for procurement and systems development.

There is a role for JISC to fund activities that help libraries and the community to understand and prepare for the role of libraries in the future.

We need case studies of people who have made the early jump to an open source system and some handholding for others who are considering this.

Strategically links with vendors need to be strengthened.

Individual libraries will struggle with the world catalogue... this will have to be centrally supported, a UK consortium with weight.

Forecasting and horizon scanning is particularly important in looking at what we can learn or redeploy from other sectors.

SCONUL and CURL are the main places where discussions take place about the changing role of the library.

What's interesting is whether we as a community can wield some power.

There is some fantastic work going on with the JISC Information Environment, but for most practitioners this is silo stuff...there is a huge issue about JISC work not meaning anything at the local level.

The shared services agenda is really important in terms of general efficiency and collaboration in the public sector.

The processes of constructing the e-Framework and the e-Learning Programme and so on help to shape thinking and reach common understandings about ways of working, common agreed standards, challenges that can be debated and worked through.