



Leaders Forum

Baltimore, MD
March 21, 2017

by Rober Miller
LYRASIS CEO



Leaders Circle – thought, vision and strategy 

The power of the Leaders Circle

- 63 thought leaders representing organizations, institutions and campuses who are positions to future proof (looking forward) and become more anti-fragile (downside protection).

Types of institutions	
Public libraries	4.62%
Non-public libraries	76.92%
Archives	7.69%
Museums	6.15%
State librarians	3.08%
Specialty institutions	1.54%

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Catalyst \$100,000 Fund – invest in our own future 

- 61 ideas! Brilliant!!
- 86% of all applications came from Academic Libraries
 - 11% of all applications are from HBCUs
- 8% of applications came from State Libraries
- 49% represent collaborations of some kind**
- Only 1 application came in from an Archives, a Special Library, or a Public Library as the lead institution...

13
Ideas
= 21%

48
Proposals
= 79%

+\$1.3
Million Requested

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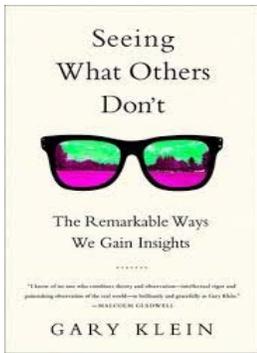
...proposals and ideas should be innovative, stimulate creativity and have the potential to impact the community...

Our vision...



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Gather data... 



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Our natural inclination ... 

performance improvement = 

errors & uncertainty

standards
controls
documentation
reviews
rigor
checklists
procedures

Gary Klein, Seeing What Others Don't (2013)

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Seeing what others don't....



• **How organizations obstruct insights (p. 156-169)**

- The heightened energy to reduce error and uncertainty
- Little care about making discoveries



What can derail us....

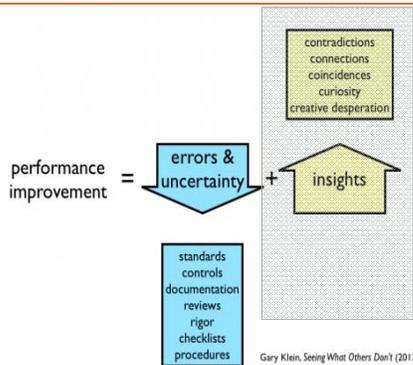


• **How not to hunt for insights (p. 171)**

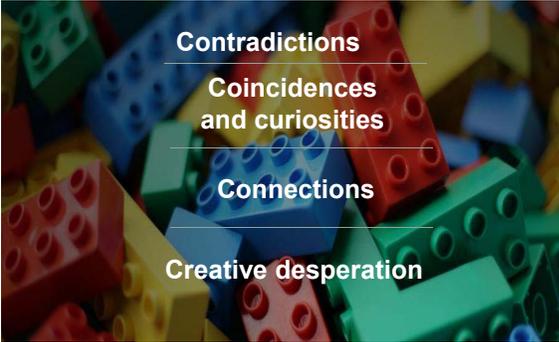
- We have natural ways of conducting business and reaching decision; rarely think of unorthodox uses



As leaders, we also need an up arrow ...



4 Major categories... 



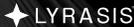
Contradictions
 Coincidences and curiosities
 Connections
 Creative desperation

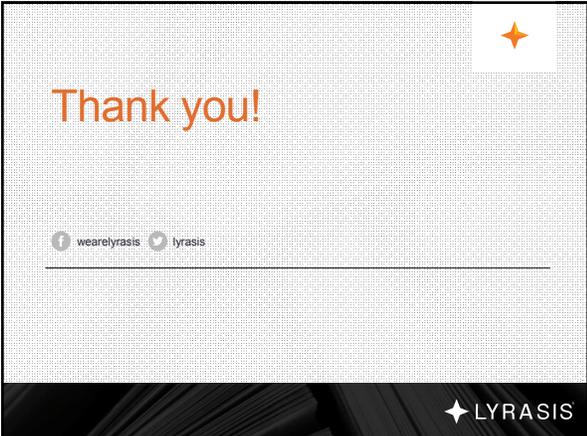
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by Rober Miller
 LYRASIL CEO





Thank you!

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Criteria for Consideration ★ LYRASIS

- Is the application an innovative or creative solution to a well-defined problem?
- Does the application have the potential for broad impact in advancing an important objective of the library, archives and/or museum communities?
- Is the plan of work and budget realistic and appropriate?

4000+ Member Partners Think inclusive Is this realistic?

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Our curse ... and our blessing... ★ LYRASIS

performance improvement = errors & uncertainty + insights

lyrasis.org Cary Klein, Seeing What Others Don't (2013)

★

Transforming an institution: Can you gain independence by giving it up?

Derick Dreher
Board Member Trustee

★ LYRASIS

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“For things to remain the same,
everything must change”

Lampedusa, *The Leopard*, 1958

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THE ROSENBAACH
MUSEUM & LIBRARY

Rarefied collections and spaces...



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THE ROSENBAACH
MUSEUM & LIBRARY

...brought to life by public programs



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The Elephant & the Mouse

Free Library of Philadelphia

- Physical facilities: 54 locations
- 1,200 employees (of which 10% Foundation staff)
- 6 million visitors annually
- Annual budget \$52 m; endowments approx. \$27 m

The Rosenbach

- Physical facilities: two adjacent townhouses
- 400,000 collections items from ancient Egypt to the present
- 15,000 visitors annually; 18 staff
- Annual budget \$2 m; endowments approx. \$8 m

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What did we want?

Free Library of Philadelphia

- Move from "transactions" to "transformations"
- Expand humanities programming & partnerships

The Rosenbach

- Greater administrative and development capacity; reduce burden of "going it alone"
- Increased visitation and visibility

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Did the missions match?

The Free Library of Philadelphia advances literacy, guides learning, and inspires curiosity.

The Rosenbach seeks to inspire curiosity, inquiry and creativity by engaging broad audiences in exhibitions, programs, and research based on its remarkable and expanding collections.

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What we did first... 

- Declared an “intent to affiliate” in April 2013 after a year of confidential talks
- Orphan’s Court approval came in December 2013
- Rosenbach implemented new by-laws that named Free Library Foundation as the ‘member’
- Rosenbach still has its own: 501(c)3 registration, its own collections, its own endowments
- Rosenbach also still has a board; five members are shared

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What we did next... 

- Hired a top-flight director of development, who reports to—and utilizes—the FLP’s vast development team (25 p.)
- Hired a marketing person who reports to the FLP’s department of external affairs
- Moved the reporting for program staff and others over to the FLP, with its larger bench depth in those areas
- Shifted oversight of the FLP’s seven different special collections (ca. 25 staff) to the Rosenbach
- Collaborated in every way but marketed separate brands

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Wasn’t this risky? 

- YES!
- Some of our long-time prior funders are gone forever.
- And...if something hasn’t worked a dozen times, what leads you to conclude the thirteenth will be different?
- The greater risk for the Rosenbach was going it alone and failing—only to be dissolved or moved.
- We kept the staff, the collection, the endowments intact.

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How we paid for it...

- Our five-year plan foresaw increasing expenditures faster than revenues, creating a paper shortfall of \$3 million
- We set out to raise this money in advance so that we could focus on making the affiliation work.
- The so-called "Transition Fund" subvents operations, and also allows special strategic investments.
- Major foundations were very supportive of our efforts and among our first donors.

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So how's it going?

- People have heard of us! They're confused, but think "we're a winner."
- Press coverage, visitation and giving have increased.
- New operational efficiencies, such as reductions in insurance costs, audit costs, bookkeeping costs, etc. The savings gets reinvested in programs and marketing.
- Many processes and protocols still being invented.
- Unified special collections team is just getting its feet wet.

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If we could do it again

- Communicate early with staff. (email ≠ communication!)
- Clear, sustained messaging about the integrity of collections, endowments, etc. Emphasize you are still raising money.
- Don't leave operations questions for last—staff were hurt.
- Anticipate tension in joining different organizational cultures with dozens of different—it's normal!
- Embed someone from the larger org in the smaller one.

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✦

Invest and Create vs. Sit and Wait

Addressing a Technical Capacity Credibility Gap

Joe Lucia
Member Trustee

✦ LYRASIS

Culture / History ✦ LYRASIS

- Failed / incomplete initiatives
- Insular and unresponsive tech support unit
- Disconnect between technical staff & services staff
- “Collaborative” processes based on ritualized committee activities
 - With little practical impact
- Adopting commercial solutions
 - Relying on support contracts and external services

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Prior Attempts to Solve ✦ LYRASIS

- Created separate “digital initiatives” team
 - Gave them development & innovation capacity
- Products of new group were mostly “outward facing”
 - Rather than focused on key library service needs
- Research Services acted independently to address needs
 - With third-party solutions



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Patron Impacts



- Bad off-the-shelf implementation of “discovery service”
- Massive quantities of content undiscoverable or poorly exposed



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New Environmental Changes (trigger)



- New technology leadership
- Re-organized tech team with accomplished developers
- Rapid migration to new library enterprise platform



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Need

- Total re-think / re-build of discovery services
- Better, improved patron access, services
- Inspired, engaged, proactive staff

Challenge

- Realigning (non-tech) group mindsets with new tech team’s energy and capabilities to drive/improve technology adoption

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So, as the Library Director ... ✦ LYRASIS

- What do you do?
- And how do you do it?
- What process improvements might be realized?
- What are the impacts on the patrons (external) and staff (internal)?



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✦

Emergence of Open Content

March 21, 2017

Celeste Feather
Director of Licensing and Strategic Partnerships

[ih-mur-juh ns] *Formation of collective behaviors causing a system to coalesce into something novel*

✦ LYRASIS

Signs of Change ✦ LYRASIS

<p>Paywalled</p> <ul style="list-style-type: none"> • Industry consolidation • Private equity • Mature market • Barriers to competition • Potential for disruptive change 	<p>Open</p> <ul style="list-style-type: none"> • Multi-stakeholder collaboratives • Social responsibility • Opportunities to engage • Community energy 
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Trending Now LYRASIS

- Openly licensed cultural content
(copyrightable materials of all formats that may be freely and legally reproduced, edited, expanded, and republished)
 - Digital learning objects
 - Primary source documents
 - Local/regional content
 - Scholarly content
 - Technical content
- Social responsibility and long-term obligations
- Knowledge diffusion network







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Taking Action LYRASIS

- “Not self-indulgence, but self-preservation”
- Support for progress of intellectual thought and expression in a sustainable manner
- Multi-stakeholder alliances
- Digitization to Digitality
- Investigate, collaborate, promote, and accelerate adoption of Open using a holistic approach
- Instigate change






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Questions LYRASIS

- Are there enough opportunities for your institution to engage in Open Content movement?
- How does your institution decide to support Open Content initiatives?
- Are there success stories of new local/regional multi-stakeholder collaborations around Open Content?

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please contact us for more info.

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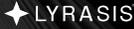
Celeste Feather
 Director of Licensing and Strategic Partnerships



Integrations
 (Not Mergers)

John Herbert
 Director of Technology Services

Laurie Gemmill Arp
 Director of Collections Services
 & Community Supported Software



Outline 





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- Setting the Stage - John
- Use Case: Archives Workflow - Laurie
- Discussion - Everyone

Open Source 

- Assumption: We are all strong supporters of open-source
 - Benefits are obvious
 - Different levels of commitment
- At LYRASIS
 - We have focused on a few open-source platforms
 - Org Home for 2
 - Provide services for 3
 - Gained additional perspective, knowledge in DS merger assessment
- Mostly academic libraries here today
 - But our view includes archives and museums
 - Federal agencies
 - LAMs

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Lay of the Land 

- Open-source platforms for LAMs often developed in stand-alone fashion
 - Limited funding (grants)
 - Drive by technologists, larger institutions
- Focus on their core functionality
 - Limited resources – funding / time / developers
 - Narrow set of use cases
 - Department level workflows
- Thin support for some additional functionality
 - e.g., DAMs have (minimal) collection admin
- These add-on “bits” point to potential integrations

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What We See 

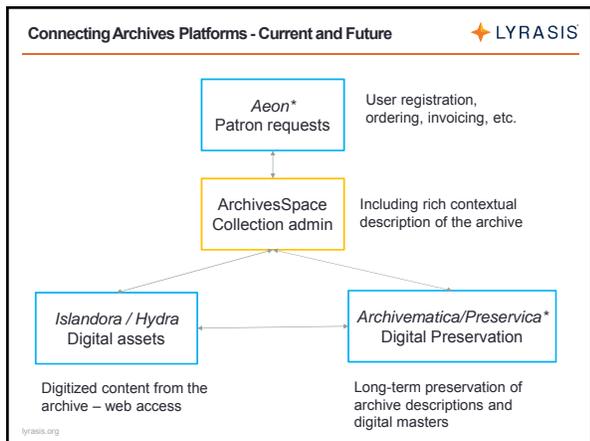
- Within the “open” space
 - Confusing landscape
 - Lots of moving parts / Lots of overlap
 - Resulting in potential competition between platforms
 - We want to connect, not compete
 - Good news..... work currently going on to integrate some platforms
- There is a bigger picture that’s emerging
 - Enterprise-level work flows coming to the forefront

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Use Case: Archives Workflows / ArchivesSpace ✦ LYRASIS

- **Why integrate?**
 - As software matures, look to next step
 - Other functions: build on or integrate?
- **The value of integrations**
 - Leverage the best functionality in each platform
 - Work with best of breed
 - Helps program focus
 - Sustainability
 - Streamlined workflows, integrated systems = happier users
- **The challenge of integrations**
 - Separate platforms, communities coming together
 - Competing priorities
 - Synchronizing distinct platforms (APIs, open systems assist)

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Discussion Questions ✦ LYRASIS

- What is the overall need for integrations?
- Is it important to focus only on integrating open source systems?
- How important are enterprise-level workflows?
- What integrations make the most sense to address, are on your wish list?



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Discussion Questions



- How do the respective communities come together/organize?
- Who leads?
- How to prioritize all the various projects?
- How can we adopt additional standards to facilitate inter-operability?
- What are potential funding models?