Leaders Forum
Trenton, NJ

Outreach | Engagement | Transformation

By Robert Miller
LYRASIS CEO
LYRASIS supports enduring access to our shared academic, scientific and cultural heritage through leadership in open technologies, content services, digital solutions and collaboration with archives, libraries, museums and knowledge communities worldwide.
Disruptive and Sustainable Innovation
Why think about the future now? ... it is going to come anyway!

When asked how he scored so many goals, Wayne Gretzky allegedly said,
I skate to where the puck is going to be, not where it is.

Planning is bringing the future into the present so that you can do something about it now.

Alan Lakein

If we could first know where we are, and whither we are tending, we could better judge what to do, and how to do it.

Abraham Lincoln
How can being part of a membership org. like LYRASIS help?

- Membership
- Thought Leaders
- Transactional
Making Sense of Our Organizational Trends

- **Insource vs. outsource**
  - Make or buy decision.
  - How do we weigh alternatives—quantitative methods and qualitative elements?

- **Specialized vs. generalist**
  - Depth of knowledge vs. broad skillset spectrum.

- **Leveraging partnerships**
  - For-profit, non-profit, government.

- **Value metric model**
  - It seems we have to prove our value everyday!
Some answers are here already…

How does one balance the risk and cost?

Sustainable - pays the bills
Disruptive - future proofs.

LYRASIS’s role – innovation

**Sustainable**
- eResources
- Single point Dig
- On-campus storage
- Vendor software
- Invoices – traditional

**Disruptive**
- Open Knowledge
- Multi-tenant Dig
- Cloud Storage
- Collaborative software
- Fiscal innovation
Positioning/Helping Our Members to Punch Above their Weight

leaderscircle
vision, strategy, collaboration

Leaders Forums  Catalyst Fund  CEO’s Choice
INNOVATION ACROSS COMMUNITIES
LYRASIS’s Call to Action and Duty for our members

• Engage - New ways, our members.

• Yearly cycle - input/output
  • Leaders Forums - think big
  • Catalyst $100,000 Fund – TpS$
  • Membership Summit - channel
    • Leaders Circle -
    • Shark tank round robin

• Partnerships –
  • GLAMs
  • Non-profit
  • For-profit
  • Academic
  • Funders

• Team –
  • Recruit retain an exceptional, world class staff.
The Catalyst Funding – helping light the way

- Foundations ↔ Group funding ↔ Next Gen
- Services - program - hole in the roof
- Standards, training, implementation, end-to-end soln, sunsetting
- Fair pricing – sustainable
The power of the Leaders Circle

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

<table>
<thead>
<tr>
<th>Types of institutions</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public libraries</td>
<td>4.62%</td>
</tr>
<tr>
<td>Non-public libraries</td>
<td>76.92%</td>
</tr>
<tr>
<td>Archives</td>
<td>7.69%</td>
</tr>
<tr>
<td>Museums</td>
<td>6.15%</td>
</tr>
<tr>
<td>State librarians</td>
<td>3.08%</td>
</tr>
<tr>
<td>Specialty institutions</td>
<td>1.54%</td>
</tr>
</tbody>
</table>
• 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 MillionRequested
Criteria for Consideration

• 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?
CEO’s choice…

A proposal or idea, that is innovative, stimulates creativity and has the potential to impact the community,

But the community didn’t see…
Seeing What Others Don’t

The Remarkable Ways We Gain Insights

“[I know of no one who combines theory and observation—intellectual rigor and painstaking observation of the real world—as brilliantly and gracefully as Gary Klein.”

—MALCOLM GLADWELL

GARY KLEIN
Our natural inclination ...

performance improvement = errors & uncertainty

standards controls documentation reviews rigor checklists procedures

Gary Klein, Seeing What Others Don’t (2013)
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
• 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 ...

performance improvement = errors & uncertainty + insights

standards controls documentation reviews rigor checklists procedures

contradictions connections coincidences curiosity creative desperation

Gary Klein, Seeing What Others Don’t (2013)
4 Major categories…

- Contradictions
- Coincidences and curiosities
- Connections
- Creative desperation
Our curse … and our blessing…. 

performance improvement = errors & uncertainty + insights

contradictions connections coincidences curiosity creative desperation

standards controls documentation reviews rigor checklists procedures

Gary Klein, Seeing What Others Don’t (2013)
At the end of the day, we have to increase our value…

Prove It Everyday
please contact us for more info.

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Skype robert-miller

Robert Miller, CEO LYRASIS
Preparing for Disaster: Developing a Statewide Emergency Response Network for the Cultural Community

Michele P. Stricker
Deputy State Librarian
Lifelong Learning, New Jersey State Library

What is NJCAR?

The New Jersey Cultural Alliance for Response (NJCAR) empowers New Jersey's cultural communities to preserve their valuable assets and sustain operations before, during, and after disasters strike. This new Alliance is comprised of a network of organizations, associations, agencies, and individuals dedicated to safeguarding the State's cultural heritage. NJCAR is affiliated with the national group — Foundation of the American Institute for Conservation of Historic and Artistic Works’ Alliance for Response.

What is New Jersey’s cultural community?
- Libraries
- Museums and galleries
- Performing arts venues
- Archives and manuscript repositories
- Historic districts, sites, and parks
- Artists
- Historical societies
- Arboretums and botanical gardens
- Archaeological sites
- Affiliated persons, agencies and organizations

www.njstatelib.org/njcar

NJCAR is affiliated with the Foundation of the American Institute for Conservation of Historic and Artistic Works’ Alliance for Response. This national group works on connecting local emergency responders with representatives of the cultural heritage community. Regardless of the scope of the emergency, the first response will always be local. The need for dialogue is clear, and partnerships must be in place before disaster strikes. See www.heritagemergency.org for more information.
Founding Members & Liaisons

- Conservation Center for Art and Historic Artifacts
- County Archives and Records Management Association
- FEMA (Liaison)
- Heritage Preservation
- The League of Historical Societies of New Jersey
- LYRASIS
- Mid-Atlantic Regional Archives Conference (MARAC)
- New Jersey Council on the Arts
- New Jersey Department of Environmental Protection – State Parks Services
- New Jersey Department of State
- New Jersey Emergency Management Association
- New Jersey Historic Preservation Office
- New Jersey Historic Trust
- New Jersey Historical Commission
- New Jersey Library Association
- New Jersey Office of Programs
- New Jersey State Archives
- New Jersey State Library
- New Jersey State Museum
- New Jersey State Police – Office of Emergency Management (NJOEM)
Creating Sustainable Relationships through Collaboration

Local Community Collaboration

Statewide Collaboration

ALLIANCE FOR RESPONSE

State Heritage Emergency Partnership

NJ CAR

NEW JERSEY CULTURAL ALLIANCE FOR RESPONSE

OFFICE OF EMERGENCY MANAGEMENT

STATE OF NEW JERSEY

AIC

THE FOUNDATION OF THE AMERICAN INSTITUTE FOR CONSERVATION OF HISTORIC AND ARTISTIC WORKS

STATE POLICE

NJ
Goals of the Partnerships

- Alliance for Response fosters cooperation among cultural organizations, influences local planning efforts, and enhances the protection of cultural historic resources.

- To build relationships
- To educate cultural heritage and emergency management professionals
- To develop strong, ongoing networks to facilitate effective local response
Education and Training
Emergence of Open Content

Celeste Feather
Director of Licensing and Strategic Partnerships

[ih-mur-juh ns] Formation of collective behaviors causing a system to coalesce into something novel
**Paywalled**
- Industry consolidation
- Private equity
- Mature market
- Barriers to competition
- Potential for disruptive change

**Open**
- Multi-stakeholder collaboratives
- Social responsibility
- Opportunities to engage
- Community energy
Relationships

Open Education

Open Educational Resources

Open Access Scholarly Publishing

Open Content
• 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
Taking Action

• “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
Questions

• How do you envision that your organization will be engaging in the Open Content movement in the next 5 years?

• What are the driving forces behind the Open Content momentum in your environment?

• What are the barriers in your organization that slow down or prevent the transition to more to Open Content?
please contact us for more info.

Phone 800.999.8558
Email celeste.feather@lyrasis.org

Celeste Feather
Director of Licensing and Strategic Partnerships
Observations

• Movements within the landscape
  • Open-Source
  • Software as a Service (SaaS)
Open-Source Software

Benefits
- Community and Collaboration
- Sharing resources
- Getting what you need

But …..
- Often developed in stand-alone fashion
- Driven by large institutions / technologists
- Many projects, platforms
- Confusing landscape
- Sustainability is a challenge
Software as a Service

• Institutions everywhere dis-engaging from operating all the software they need
  • Prominent, world renown universities are outsourcing
  • Smaller, community-based org’s don’t have dedicated IT resources
• Relinquishing control of smaller, less enterprise-critical platforms
• Allowing 3rd party service providers to handle infrastructure, technical support
Decisions, Decisions, Decisions

- Cost-Benefit Analysis
  - Total cost vs. Total benefits
- Many pieces to the puzzle
  - Commercial – license; gen’l use case
  - Open-source – not free; longer timeline
  - Hardware – infrastructure and security
  - Software – local vs. cloud
  - Staffing – setup and ongoing support
    - Both IT and user areas
  - Workflow development / modifications
  - Data migrations
  - Integrations w/ other platforms
  - Scale-ability
Questions

• How do you/your institution view technology decisions?
• How strategic / long-term is your horizon?
• How closely do you examine total costs?
• What criteria do you consider?
  • Is open-source among them?
  • Cloud hosting?
• Would a more structured total-cost model be useful?
Three Generations in the Library: A Case Study

Leaders Forum

Robert Miller & David W. Lewis

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For some time, you have been thinking about the librarians in your library and have been concerned with several issues.

1. You are worried about succession planning. You expect to retire in two years at age 68. In the past, you were not overly concerned, but you have noticed that many libraries like yours are having trouble finding good candidates for director’s positions. All of your associate directors and department heads, except for one, are baby boomers and will retire in the next five or six years. You are not sure any of them are ready to be director or that any of them are interested in the job. The mid-career librarians mostly don’t seem interested in leadership. You have recently become concerned that the library will not have anyone to step into leadership roles after the current leadership team retires.
2. While you have generally been able to recruit good beginning level librarians, over the past few years the candidate pools have gotten smaller and you have had to offer larger start salaries.

3. The higher starting salaries for new librarians has caused salary compression. Some of the mid-career librarians have begun to grumble.

4. In the past two years three of your beginning librarians have left for more interesting positions or higher salaries. In exit interviews, several said that working in your library was fine, but their new position offered more interesting opportunities. Another left when a spouse relocated.

5. You have been unable to increase the diversity of the librarians in your library even though diversity is a campus priority.
<table>
<thead>
<tr>
<th>Last name</th>
<th>Date of Birth</th>
<th>Age</th>
<th>Start Date</th>
<th>Tenured</th>
<th>Rank</th>
<th>Women</th>
<th>Minority</th>
<th>Salary</th>
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<td>Howard</td>
<td>03/28/47</td>
<td>70.7</td>
<td>07/01/00</td>
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<td>Associate</td>
<td>1</td>
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<tr>
<td>Shively</td>
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<td>Johnson</td>
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<td>66.2</td>
<td>09/18/89</td>
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<td>0</td>
<td>$85,000</td>
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<td>06/01/02</td>
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<td>Associate</td>
<td>1</td>
<td>0</td>
<td>$87,000</td>
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<tr>
<td>Sanchez</td>
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<td>63.1</td>
<td>07/08/02</td>
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<td>Associate</td>
<td>0</td>
<td>1</td>
<td>$85,500</td>
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<tr>
<td>Javan</td>
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<td>62.2</td>
<td>07/01/94</td>
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<td>01/15/97</td>
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<td>0</td>
<td>$68,500</td>
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<tr>
<td>Smith</td>
<td>10/21/59</td>
<td>58.1</td>
<td>07/01/02</td>
<td>1</td>
<td>Librarian</td>
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<tr>
<td>Williams</td>
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<td>0</td>
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<tr>
<td>Brown</td>
<td>08/24/61</td>
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<td>06/25/01</td>
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<td>0</td>
<td>$59,500</td>
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<tr>
<td>Kline</td>
<td>03/04/64</td>
<td>53.7</td>
<td>03/02/03</td>
<td>1</td>
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<td>0</td>
<td>$62,000</td>
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<tr>
<td>Jackson</td>
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<td>50.3</td>
<td>01/15/10</td>
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<td>Assistant</td>
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<td>0</td>
<td>$57,500</td>
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<tr>
<td>Miller</td>
<td>06/26/75</td>
<td>42.4</td>
<td>06/02/03</td>
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<td>Associate</td>
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<td>0</td>
<td>$62,000</td>
</tr>
<tr>
<td>Turner</td>
<td>07/27/78</td>
<td>39.3</td>
<td>07/01/07</td>
<td>1</td>
<td>Associate</td>
<td>1</td>
<td>0</td>
<td>$56,000</td>
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<tr>
<td>Lloyd</td>
<td>09/02/78</td>
<td>39.2</td>
<td>10/01/11</td>
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<td>Assistant</td>
<td>1</td>
<td>0</td>
<td>$55,000</td>
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<tr>
<td>Wheeler</td>
<td>11/15/79</td>
<td>38.0</td>
<td>01/13/08</td>
<td>0</td>
<td>Assistant</td>
<td>0</td>
<td>0</td>
<td>$54,000</td>
</tr>
<tr>
<td>Kent</td>
<td>11/25/79</td>
<td>38.0</td>
<td>08/01/14</td>
<td>0</td>
<td>Assistant</td>
<td>1</td>
<td>0</td>
<td>$53,000</td>
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<tr>
<td>McFall</td>
<td>02/10/84</td>
<td>33.8</td>
<td>08/01/14</td>
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<td>Assistant</td>
<td>1</td>
<td>1</td>
<td>$53,000</td>
</tr>
<tr>
<td>Lee</td>
<td>12/02/85</td>
<td>32.0</td>
<td>01/06/15</td>
<td>0</td>
<td>Assistant</td>
<td>1</td>
<td>1</td>
<td>$52,500</td>
</tr>
<tr>
<td>Happel</td>
<td>12/01/88</td>
<td>29.0</td>
<td>07/05/10</td>
<td>0</td>
<td>Assistant</td>
<td>0</td>
<td>0</td>
<td>$54,000</td>
</tr>
<tr>
<td>Hartman</td>
<td>06/15/89</td>
<td>28.5</td>
<td>10/13/16</td>
<td>0</td>
<td>Assistant</td>
<td>1</td>
<td>0</td>
<td>$50,000</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>13</td>
<td></td>
<td></td>
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<td>13</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Average</td>
<td></td>
<td>50.0</td>
<td></td>
<td></td>
<td></td>
<td>61.9%</td>
<td>61.9%</td>
<td>14.3%</td>
</tr>
</tbody>
</table>
Three Generations in the Library: A Case Study

Library Demographic Summary

- Howard
- Shively
- Johnson
- O'Bannon
- Sanchez
- Javan
- Wilkinson
- Smith
- Williams
- Brown
- Kline
- Jackson
- Miller
- Turner
- Lloyd
- Wheeler
- Kent
- McFall
- Lee
- Happel
- Hartman

Legend:
- Pre-Librarian Years
- Pre-MyLib Librarian Years
- My-Lib Librarian Years
In researching the situation, you come across Stanley Wilder’s recent ARL report “Delayed Retirements and the Youth Movement among ARL Library Professionals.” You have been worried about the different generations of librarians and how this will impact the profession as a whole and particularly your library. You convert Wilder’s data to reflect the different generations and do some quick calculations on the data to project it out a few years. The result is the chart and graph below.

It looks like many academic libraries are in a situation similar to yours. You are particularly concerned with the coming need to attract a large number of younger librarians in the next five to seven years.

Finally, you were review statistics on diversity in academic librarianship and found the last chart below. You wonder what you and your library can do to change this situation.

Three Generations in the Library: A Case Study

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
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</thead>
<tbody>
<tr>
<td>Millennium 1981-2000</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.2%</td>
<td>13.5%</td>
<td>45.0%</td>
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<tr>
<td>Gen X 1965-1980</td>
<td>0.0%</td>
<td>3.0%</td>
<td>23.4%</td>
<td>39.1%</td>
<td>40.0%</td>
</tr>
<tr>
<td>Baby Boom 1946-1964</td>
<td>38.2%</td>
<td>62.0%</td>
<td>62.7%</td>
<td>47.3%</td>
<td>15.0%</td>
</tr>
<tr>
<td>Silent 1927-1945</td>
<td>52.4%</td>
<td>32.3%</td>
<td>13.7%</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>G.I. Generation pre-1927</td>
<td>9.4%</td>
<td>2.7%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
</tbody>
</table>
Three Generations in the Library: A Case Study

Ethnic Diversity of Academic Librarians

- Whites
- African Americans
- Asian
- Hispanic or Latino

- US Population 2013
- Incoming Freshman 2013
- Faculty 2011
- Librarians in US ARL Libraries 2012-13
What do you do?