



LYRASIS

Leaders Forum #4 San Francisco

by Robert Miller
CEO LYRASIS



When asked how he scored so many goals, *Wayne Gretzsky* 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




**Sustainable and Disruptive
Innovation**

Sustaining innovation seeks to improve existing products. It does not create new markets or values, but rather extends/expands existing ones.

Example:



Disruptive innovation means to reinvent a technology, business model, or simply invent it all together. Disruptive innovation generates new markets and values, in order to disrupt existing ones.

Examples:



The “innovator’s dilemma” is the tough choice any institution faces when it has to choose between holding onto an existing market/community by doing the same, yet slightly better (**sustaining innovation**), or capturing new markets/communities by embracing new technologies and adopting new business models (**disruptive innovation**).

Sustaining:

Next Year’s Model

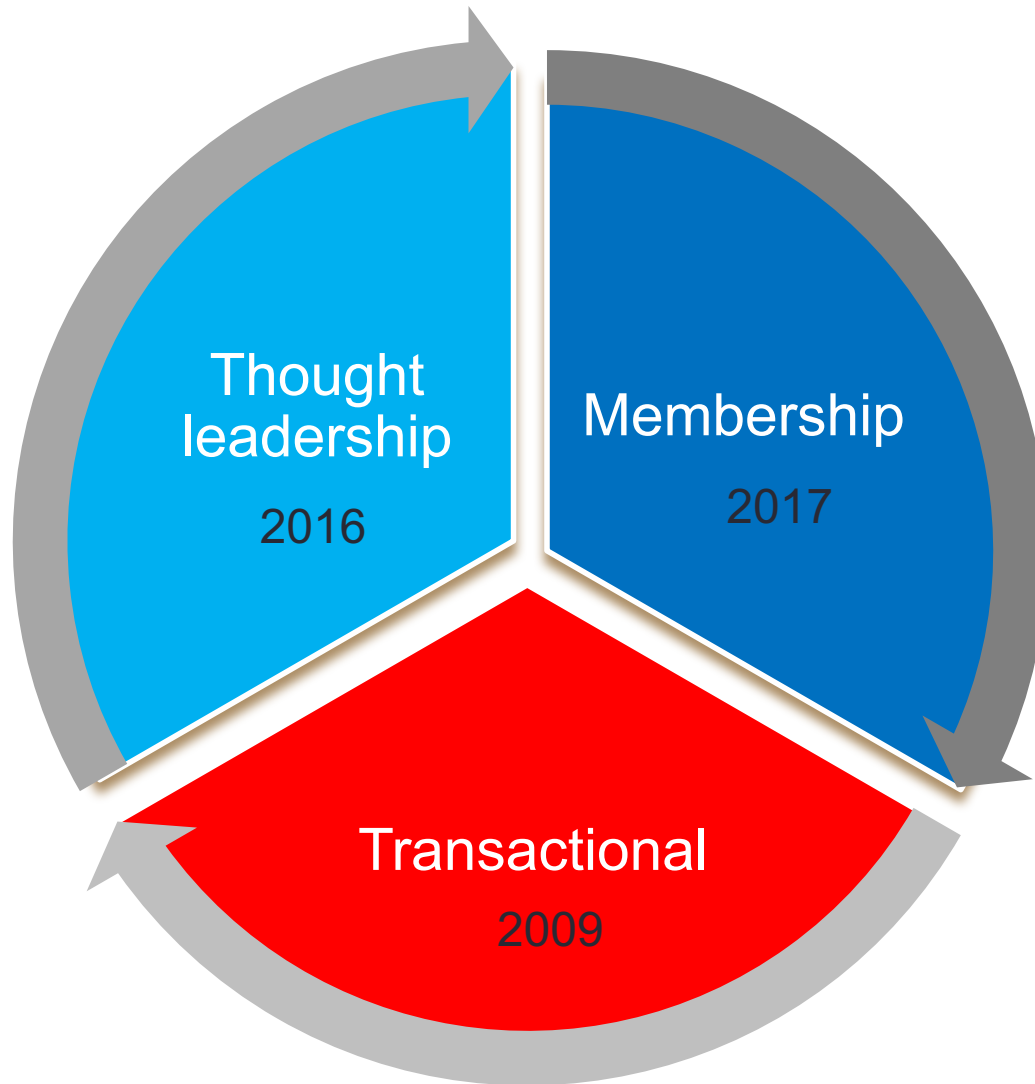


or

Disruptive:

App Based Car Service





Our roots go back to 1936



Short | Intermediate | Long-term

- **Technology**
 - Speed of change.
 - Demands of users.
- **Services: Insource vs. outsource**
 - Make or buy decision.
 - Measuring alternatives- quantitative methods and qualitative elements?
- **Staff: Specialized vs. generalist**
 - Depth of knowledge vs. broad skillset spectrum.
- **Partnerships: Leveraging connections**
 - For-profit, non-profit, government.
- **Measuring Value**
 - How to measure value of change!
 - Where to invest?
 - Test/Try

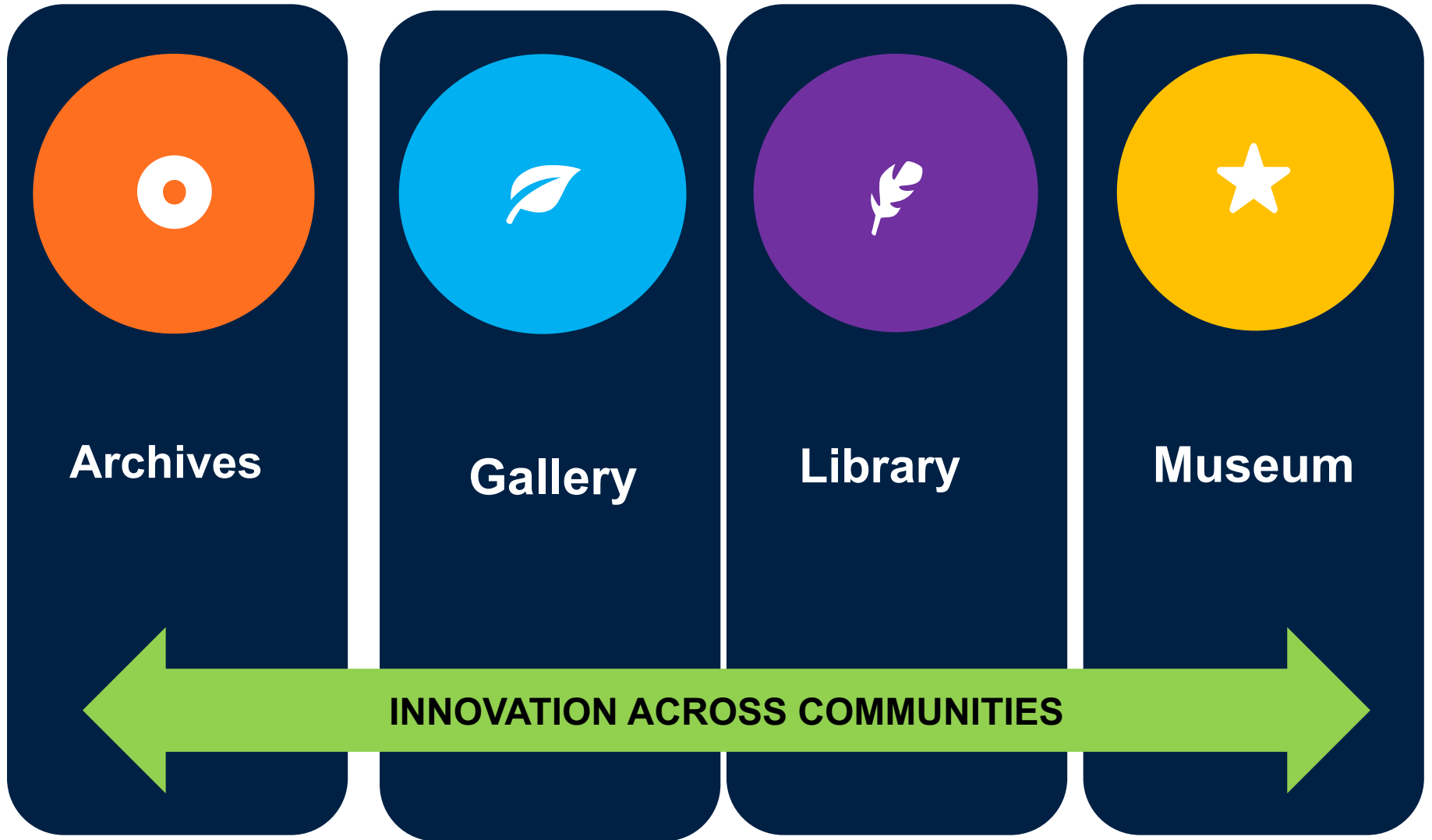
We can navigate the ‘inventor’s dilemma’ by positioning Our Members to Punch Above their Weight



Leaders Forums

**Catalyst Fund
CEO's Choice**

Annual Summit





Short | Intermediate | Long-term

- **Insource vs. outsource**
 - Make or buy decision.
 - Measuring alternatives-quantitative methods and qualitative elements?
- **Specialized vs. generalist**
 - Depth of knowledge vs. broad skillset spectrum.
- **Leveraging partnerships**
 - For-profit, non-profit, government.
- **Value model**
 - How to measure value of change!

The LYRASILS Leaders Circle is a diverse group of knowledgeable professionals working together in a highly collaborative and results-focused environment to discuss challenges and design and foster real-world solutions within our community.



LYRASIS hosted 17 Leaders Forums, regional in-person meetings that...

- pulled together a diverse cross section of thought leaders,
- discussed, dissected and focused on cross-functional challenges
- explored opportunities
- set the stage for ideation, exploration and creation

A dark, blurred background image of a laptop keyboard, with the text "Leaders Forums" overlaid in white.

Leaders Forums

What? LYRASIS created the \$100,000 Catalyst Fund to help us all punch above our weight and to fill in the funding gap identified by the Leaders Circle.

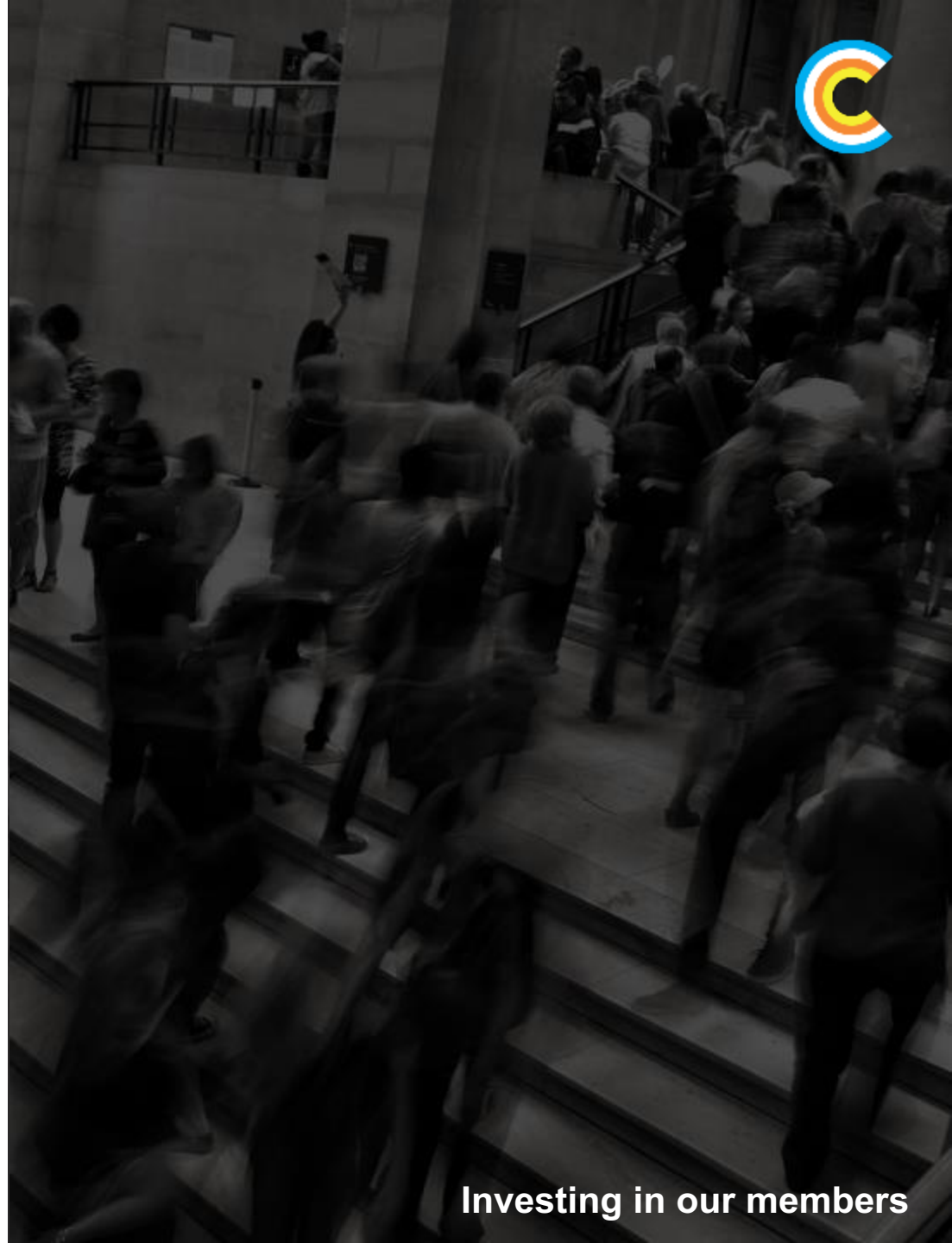
How? We devoted a portion of our organizational endowment as seed funding to test/try fantastic ideas into real world projects.

Output? White paper, sustainability plan, sandbox, etc. Identify next steps; a program, a service or 'fix the hole' in the roof.



Ideas...

In our inaugural year of the program, we anticipated receiving a handful of applications, maybe 10. Imagine our surprise when received **61!**



This year we are funding 5 Catalyst Seed Fund projects and 1
CEO's choice idea



LYRASIS Liaison: Hannah Rosen



Impact: Lower cost and increase acceptance - Sets the stage for the standardization of digital collections of 3D artifacts on a national scale. \$29,500

LYRISIS Liaison: Jennifer Bielewski



Take the solution to the location - Digitized collections and resources on developing the mobile lab will be shared with others for implementation.
\$5,550

LYRASIS Liaison: Michael A. Dixon



Impact: Creates a replicable mobile app on a national scale with open access resources adaptable to any classroom curriculum. \$26,548

LYRASIS Liaison: Annie Peterson and Michael A. Dixon



Johnson C. Smith University
Become yourself. Change our world.

Impact: Johnson C Smith – Documents an historic community and will share resources on the creation of an interactive map and digital app.
\$25,000

LYRASIS Liaison: Tom Clareson and Alicia Johnson



Impact: Determines the viability and sustainability of a copyright education center for libraries, archives and museums. Rollout a DIY model to clear copyright at scale \$30,000

LYRASIS Liaison: John Herbert



Impact: Can “Hello Alexa or Hello Google” change how ‘we’ interact with content or knowledge...i.e. a visually impaired persons to interact with a library’s collections using voice interaction with an ILS. \$17,000.

- Leaders Circle day
 - C\$F presentations
 - FY 2018 Shark Tank
- Membership Summit
 - If you had \$26 billion ...
 - And if you didn't...
 - Skill based learning
 - Knowledge acquisition
- Break outs
 - OSS, \$2.5M grant summary
 - Work shop – DIY Copyright
 - LF's summary

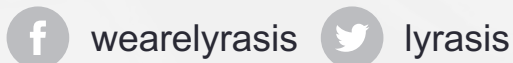




please contact us for more info.

Phone **415.640.1092**

Email **robert.miller@lyrasis.org**



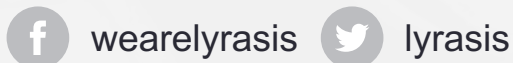
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CEO LYRASIS

3 Pronged Strategy

The Catalyst \$100,000 Fund fits as part of our 3-pronged strategy (*Leaders Forums, Leaders Circle, and Catalyst \$100,000 Fund*) to help improve the impact of your institution has on your and the LYRISIS community.

**Leaders
Forums**





Now is the best time to prepare so we know where we might end up!

As we continue to advance and uphold our mission **today**, it is equally important to keep our eye on **tomorrow** and the **future**.



- Foundations ↔ Group funding
 - The success of the C\$F will expand and deepen our Grant Funding relationships
- Services - program - hole in the roof
- STDS
- Fair pricing – sustainable

- Leaders Circle day
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**Leaders
Forums**

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The background of the slide is a dark blue and black pattern of overlapping, elongated oval shapes, creating a textured, scale-like effect.

 **\$100,000 to fund new ideas!**

The LYRASIS Catalyst Fund is a \$100,000 award program to seed fund new ideas and projects by LYRASIS members. The Catalyst Fund is a new membership benefit and is administered by the LYRASIS Leaders Circle. It was designed as a direct result of member requests for expertise, collaboration and perspective, and all projects resulting from the Catalyst Fund will be shared at our annual Member Summit.

The Catalyst \$100,000 Fund is part of a dramatic shift that is going on at LYRASIS. We are building on our core competence of transactional skills and services (eContent, Digital Services and Software solutions) and have launched, for our members, a thought leadership level that many of our members now need.



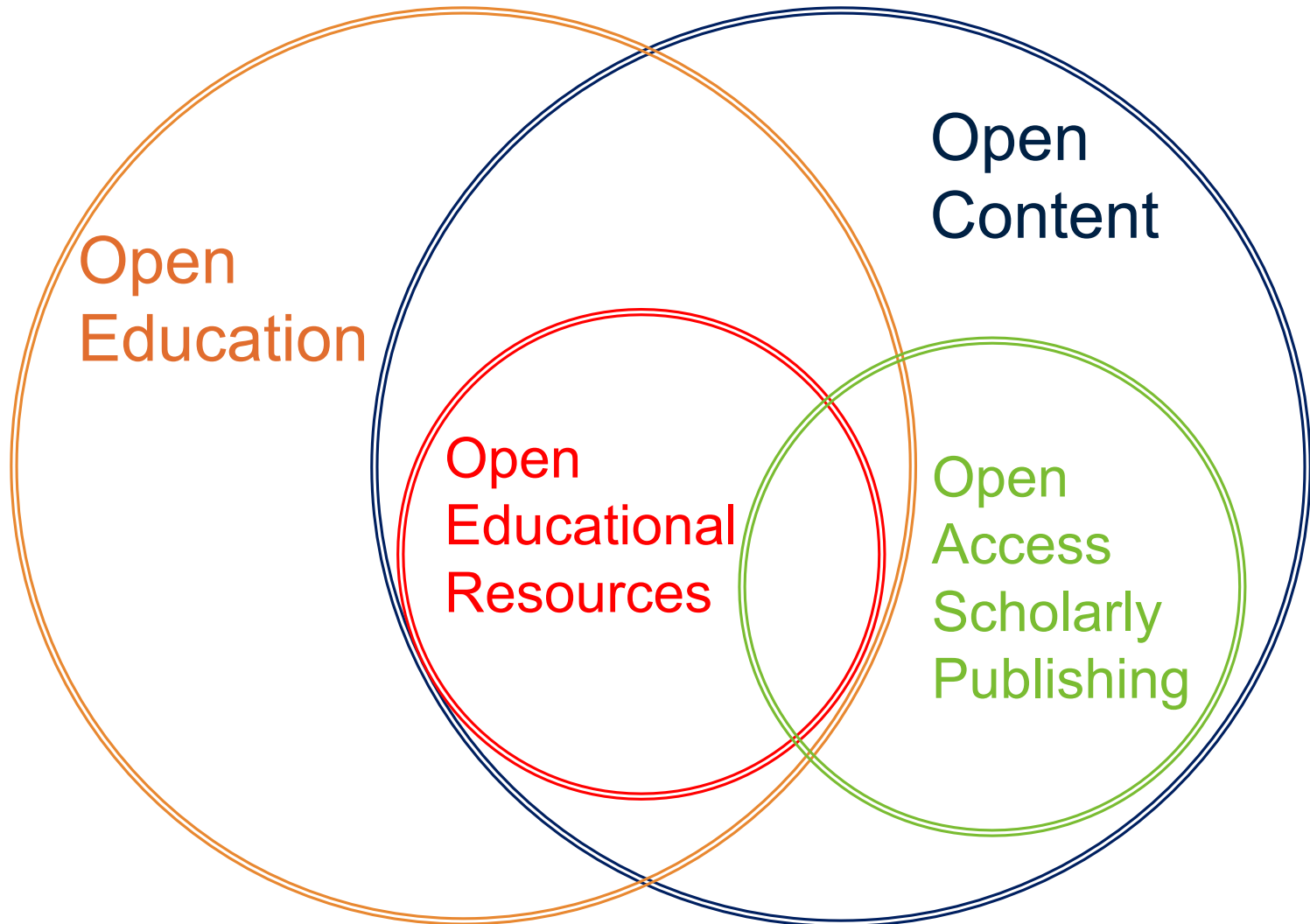


Emergence of Open Content

June 6, 2017

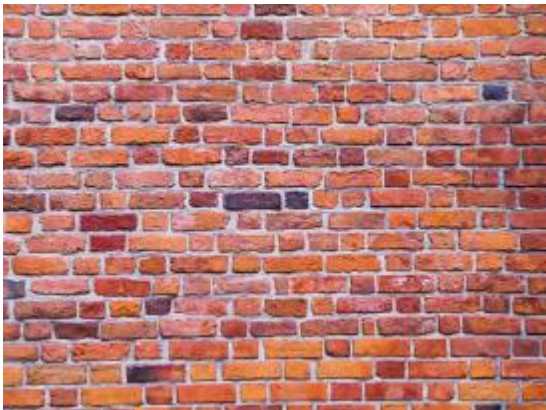
Hannah Rosen
Licensed Services Coordinator

[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



Zuckerberg-Chan Initiative

- Acquired Meta in 2017
- AI powered tool for analyzing scientific papers
- Helps scientists make connections faster

Gates Foundation

- All publications funded by the foundation must be open access
- Gates Open Research – open access platform based on F1000

Library of Congress

- making 25 million of its records available for free
- records from 1968-2014



LIBRARY OF
CONGRESS

“The Library of Congress is our nation’s monument to knowledge and we need to make sure the doors are open wide for everyone, not just physically but digitally too,” said Librarian of Congress Carla Hayden. “Unlocking the rich data in the Library’s online catalog is a great step forward. I’m excited to see how people will put this information to use.”

Museum of Modern Art

POSTED SEPTEMBER 15, 2016

MoMA Releases Digital Archive of More Than 30,000 Exhibition Images

The Museum of Modern Art has announced that it has released an extensive digital archive that chronicles its exhibitions from when the museum opened its doors in 1929 to today.

The archive features more than thirty-five hundred exhibitions and more than thirty-three thousand installation photographs, as well as primary documents such as press releases, checklists, catalogues, and artist lists.



“By making these unique resources available at no charge, the exhibition history digital archive directly aligns with the museum’s mission of encouraging an ever-deeper understanding of modern and contemporary art and fostering scholarship.”

- 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

Knowledge Unlatched 

REVEAL DIGITAL

 OpenGLAM

 Open Library of Humanities

 SCOAP³

- “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



OSI2016-25



OPEN KNOWLEDGE

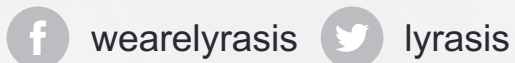
-
- How do you envision that your organization will be engaging in the Open Content movement in the next 5 years?
 - What are the driving forces behind the Open Content momentum in your environment?
 - What are the barriers in your organization that slow down or prevent the transition to more to Open Content?



please contact us for more info.

Phone **800.999.8558**

Email **Hannah.rosen@lyrasis.org**



Hannah Rosen
Licensed Services Coordinator



The **significance** of the LAMS



by John Herbert
LYRASIS Chianti and Fava Beans Expert

Question 1:

Who are the funders of your institution? Do you generate revenue, and if so, how and from whom?



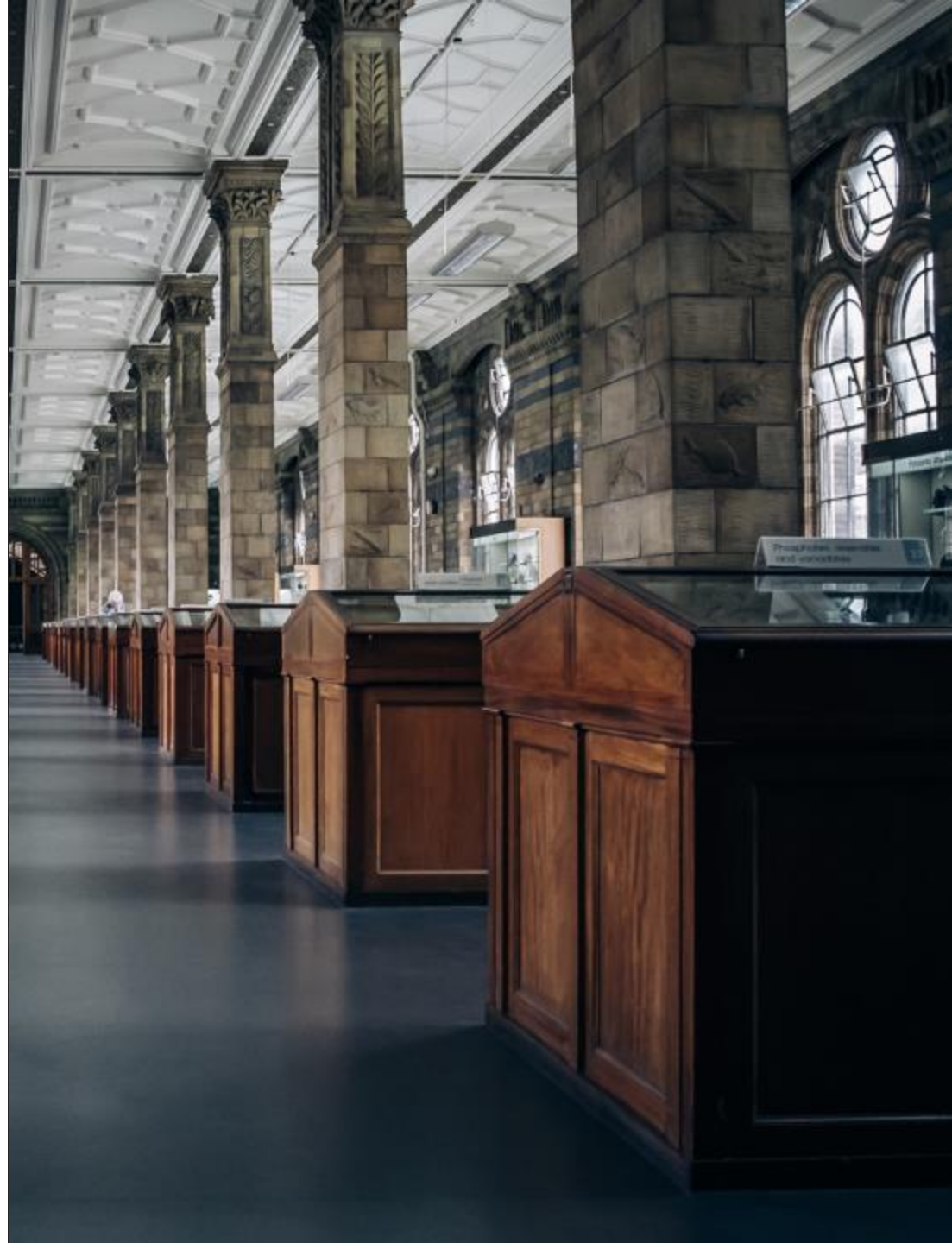
Question 2:

What is the role of patrons, users, visitors in your institution?



Question 3:

How do you utilize, even monetize, your unique materials?



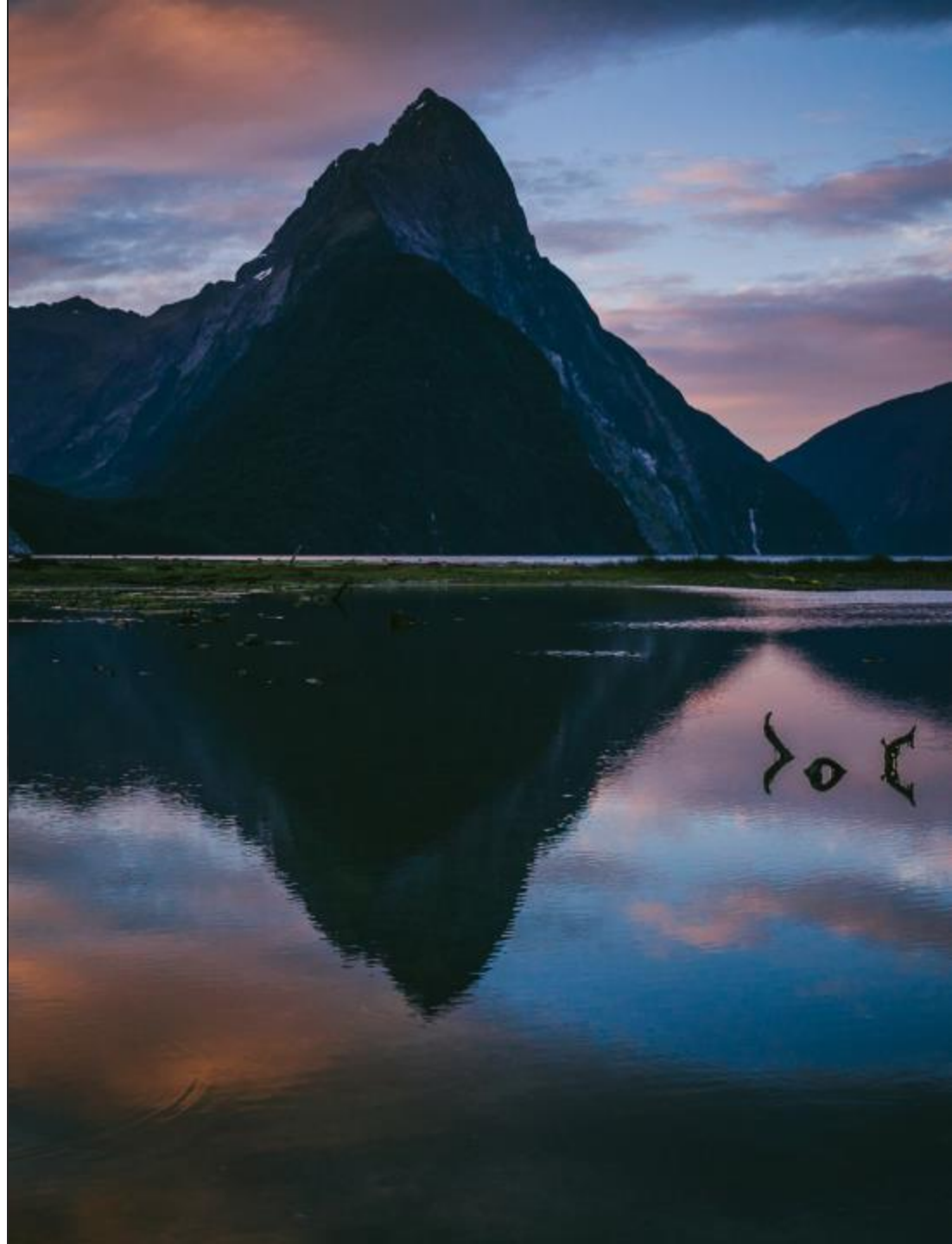
Question 4:

What is the role of technology in your institution?
Do you consider yourself leading, adopting, or following?



Question 5:

How else would you differentiate your institution from the other two categories?



Question 6:

What is the pace of change at your institution?



Our Distinguished Panel:

- **Essraa Nawar**

Leatherby Libraries Development
Coordinator
Chair, Arts, Exhibits and Events
Committee
Chapman University

- **Polina Ilieva**

Archivist
Archives and Special Collections
Parnassus Library
UC San Francisco

- **Chris Hoffman**

Program Director, Research Data
Management & Informatics
Services
UC Berkeley



- **Library**
 - Annual budget assigned by administration
 - Fundraising
- **Archive**
 - Library budget/University budget (state funding)
 - University schools, depts. and institutes that fund specific projects (for example, lecture series, book projects, school records processing)
 - Funding from private donors (for example, to catalog and process collections, to digitize collections)
- **Museum**
 - State funding from campus (declining)
 - Endowments (shrinking)
 - Donors (increasing emphasis)

- Library
 - Students, Faculty, Researchers, Collaborators, Community, Alumni
- Archive
 - Patrons/visitors inform:
 - Collection development
 - Selection of digitization projects
 - Selection of processing projects
 - Outreach events and programs
- Museum
 - BAMPFA has always had a large emphasis (new building in downtown)
 - Hearst Museum is focusing more on exhibitions
 - Building audiences through a range of digital programs and online presences

- Library
 - Circulation, Databases, Library instruction, Research, Information literacy
- Archive
 - Instructions/educational events
 - Research: books, dissertations, documentaries
 - Genealogical research
 - Institutional research
 - “Collection as data”
- Museum
 - Major emphasis on digitization
 - Research engagement
 - Instructional uses
 - Broader collections / connections among diverse materials

- **Library**
 - Extremely technology heavy.
 - Metadata, Digital Commons (B-press), LibChat, OCLCArchive
- **Archive**
 - Working the past 20 years on digitizing our materials and building digital collections
 - With the number of born-digital materials growing exponentially, we established a Digital Archives Program and hired our first Digital Archivist
- **Museum**
 - Campus-wide platform to support information management and data quality
 - Use collections information to support strategic initiatives
 - Moving into new buildings, digitization, public/research engagement
 - Emerging: Connections across collections, visualization

- Library
 -
- Archive
 - Our archive exists within a library and we do have an art and artifact collections so we can be described as a small museum. That versatility creates new opportunities and challenges
- Museum
 - Varied types of collections (art to zoology)
 - Physical needs (storage, conservation, photography, and handling)
 - Information dimensions (metadata, associated procedures).
 - Lack of metadata standards in many fields
 - Collections do not fit ideally into digital library systems

- Library
 -
- Archive
 - Is accelerating, we have to be life-long learners and include anticipated changes into our workflows
- Museum
 - Pace is already fast and is increasing in speed and level of disruption
 - Tension between this change and the core mission of managing a collection for the long term



Software / Technology Costs and Decisions

John Herbert
Director – Technology Services

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

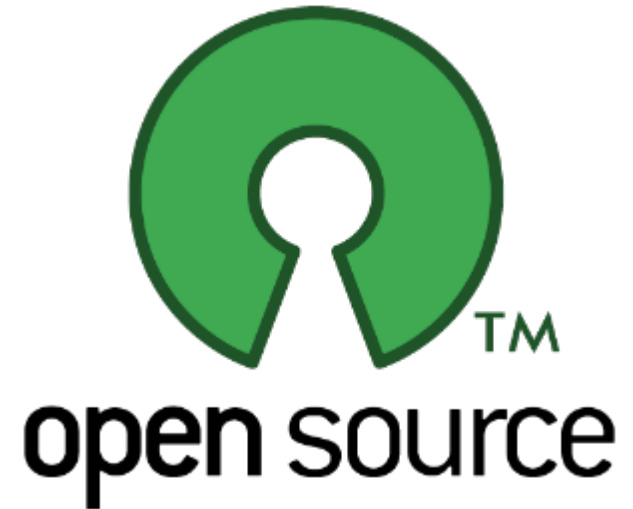


Benefits

- 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



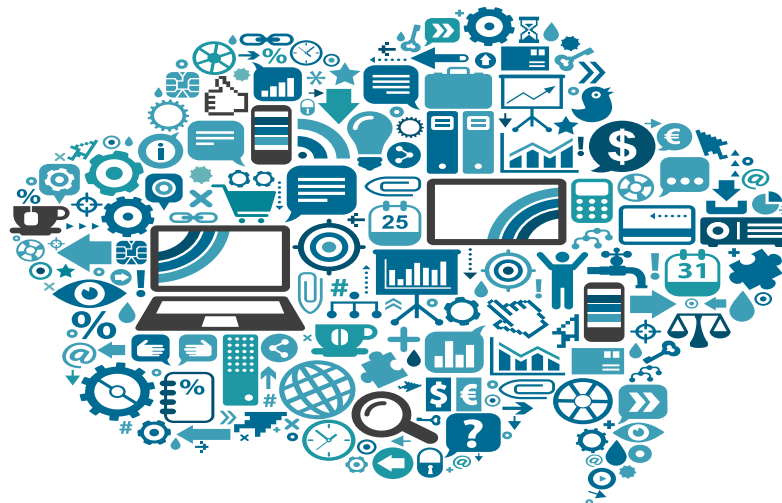
- Institutions everywhere dis-engaging from operating all the software they need
 - Prominent, world renown universities are outsourcing
 - Smaller, community-based org's don't have dedicated IT resources
- Relinquishing control of smaller, less enterprise-critical platforms
- Allowing 3rd party service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



- 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



- 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: Case Study by David Lewis, IUPUI

Robert Miller & Meg Blum

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.

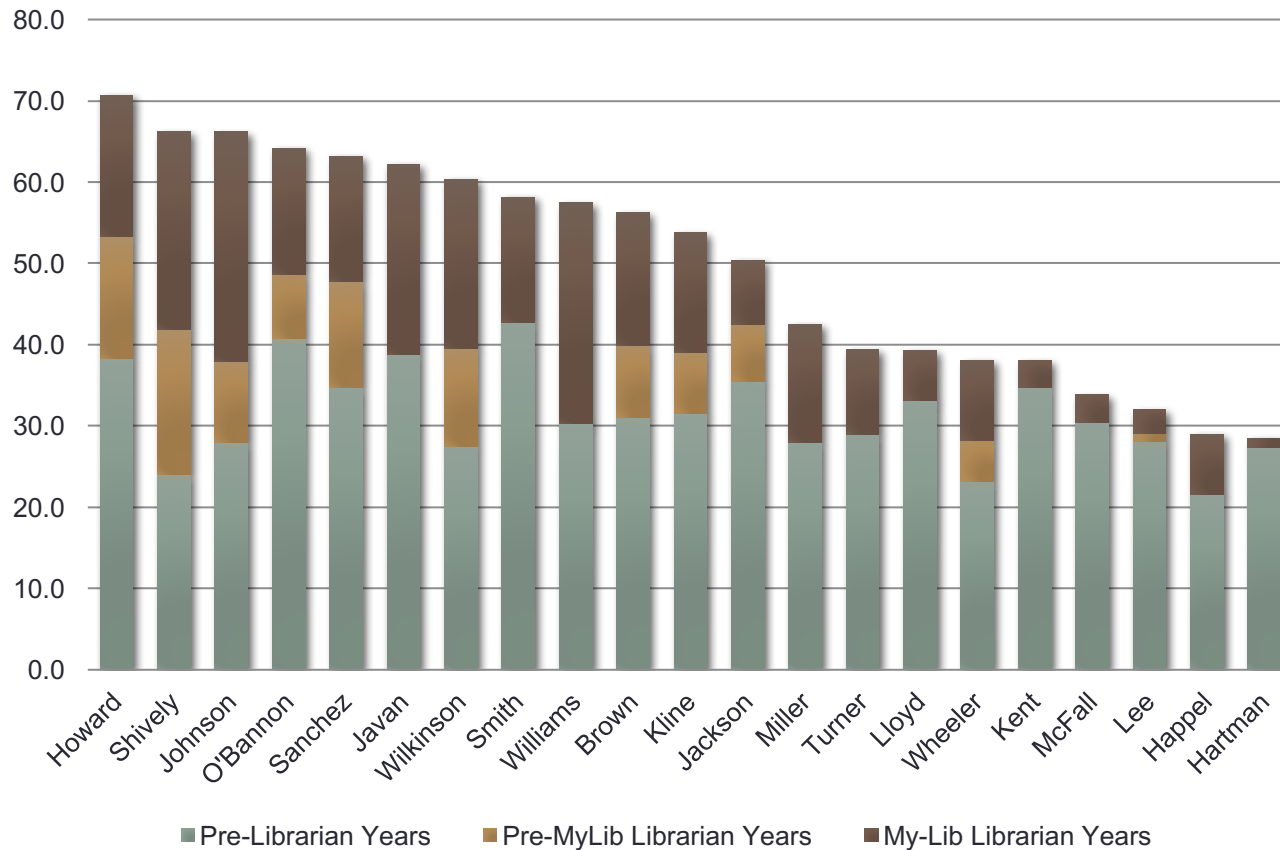
2. While you have generally been able to recruit good beginning level librarians, over that past few years the candidate pools have gotten smaller and you have had to offer larger start salaries.
3. The higher starting salaries for new librarians has caused salary compression. Some of the mid-career librarians have begun to grumble.
4. In the past two years three of your beginning librarians have left for more interesting position 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.

Three Generations in the Library: A Case Study

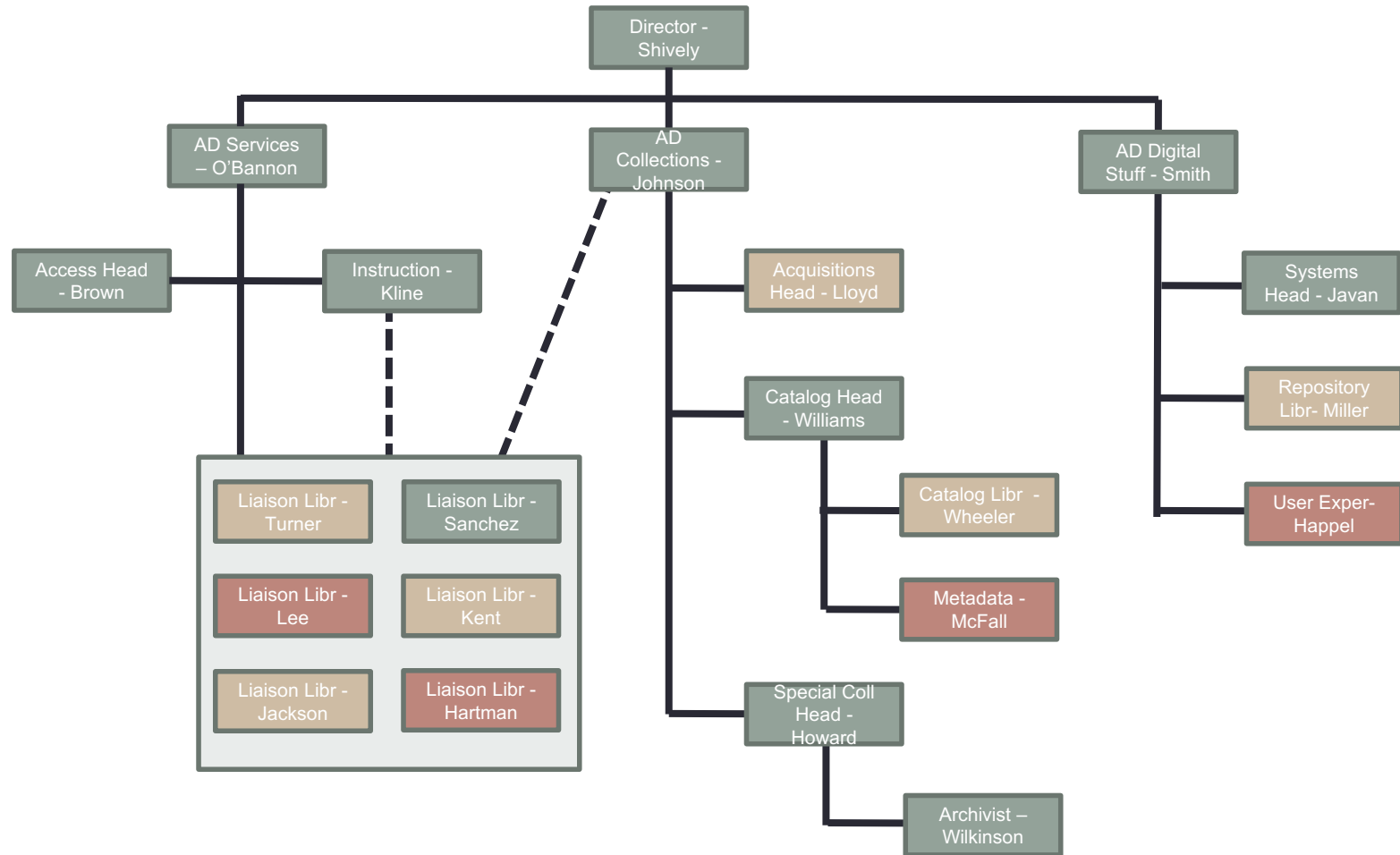


Library Demographic Summary								
Last name	Date of Birth	Age	Start Date	Tenured	Rank	Women	Minority	Salary
Howard	03/28/47	70.7	07/01/00	1	Associate	1	0	\$72,500
Shively	09/14/51	66.2	08/16/93	1	Librarian	0	0	\$135,000
Johnson	10/01/51	66.2	09/18/89	1	Associate	0	0	\$85,000
O'Bannon	09/21/53	64.2	06/01/02	1	Associate	1	0	\$87,000
Sanchez	10/21/54	63.1	07/08/02	1	Associate	0	1	\$85,500
Javan	09/12/55	62.2	07/01/94	1	Associate	1	0	\$62,500
Wilkinson	07/15/57	60.4	01/15/97	1	Associate	0	0	\$68,500
Smith	10/21/59	58.1	07/01/02	1	Librarian	1	0	\$82,000
Williams	06/25/60	57.4	10/26/90	1	Associate	0	0	\$73,500
Brown	08/24/61	56.3	06/25/01	1	Associate	0	0	\$59,500
Kline	03/04/64	53.7	03/02/03	1	Associate	1	0	\$62,000
Jackson	08/05/67	50.3	01/15/10	0	Assistant	1	0	\$57,500
Miller	06/26/75	42.4	06/02/03	1	Associate	1	0	\$62,000
Turner	07/27/78	39.3	07/01/07	1	Associate	1	0	\$56,000
Lloyd	09/02/78	39.2	10/01/11	0	Assistant	1	0	\$55,000
Wheeler	11/15/79	38.0	01/13/08	0	Assistant	0	0	\$54,000
Kent	11/25/79	38.0	08/01/14	0	Assistant	1	0	\$53,000
McFall	02/10/84	33.8	08/01/14	0	Assistant	1	1	\$53,000
Lee	12/02/85	32.0	01/06/15	0	Assistant	1	1	\$52,500
Happel	12/01/88	29.0	07/05/10	0	Assistant	0	0	\$54,000
Hartman	06/15/89	28.5	10/13/16	0	Assistant	1	0	\$50,000
	Total			13		13	3	
	Average	50.0		61.9%		61.9%	14.3%	

Library Demographic Summary



Three Generations in the Library: A Case Study



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.

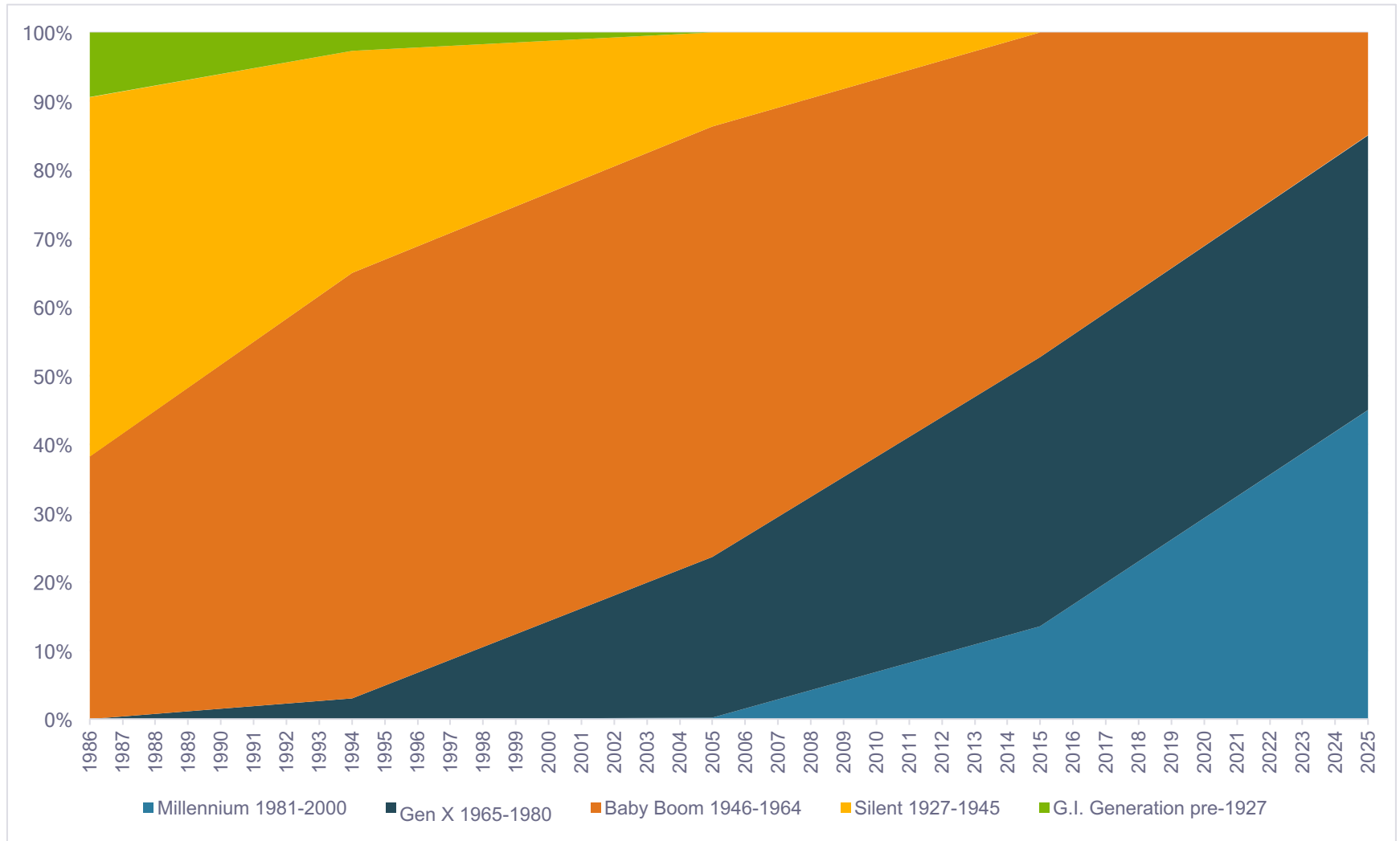
It looks like many academic libraries are in a situation similar to yours. You are particularly concerned with the coming need to attract a large number of younger librarians in the next five to seven years.

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.

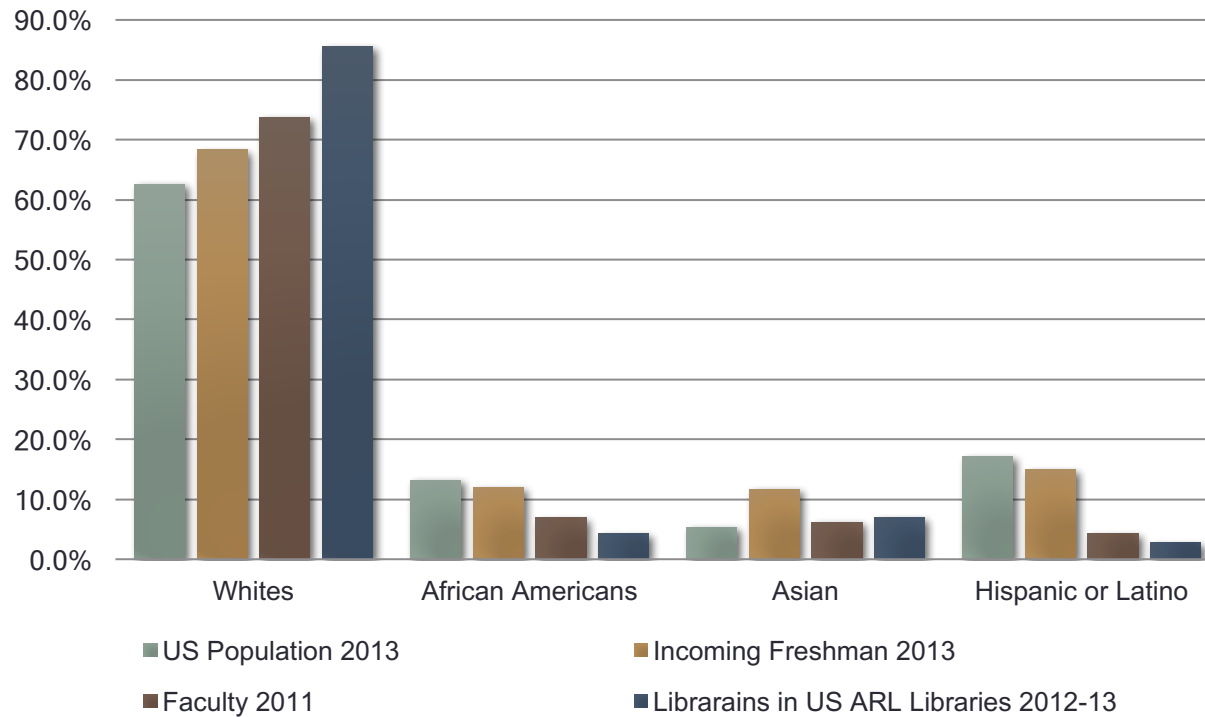
Stanley Wilder, "Delayed Retirements and the Youth Movement among ARL Library Professionals," Washington, DC: Association of Research Libraries, 2017,
<http://www.arl.org/storage/documents/publications/rli-2017-stanley-wilder-article1.pdf>

	1986	1994	2005	2015	2025
Millennium 1981-2000	0.0%	0.0%	0.2%	13.5%	45.0%
Gen X 1965-1980	0.0%	3.0%	23.4%	39.1%	40.0%
Baby Boom 1946-1964	38.2%	62.0%	62.7%	47.3%	15.0%
Silent 1927-1945	52.4%	32.3%	13.7%	0.0%	0.0%
G.I. Generation pre-1927	9.4%	2.7%	0.0%	0.0%	0.0%

Three Generations in the Library: A Case Study



Ethnic Diversity of Academic Librarians



What do you do?