

# Collaborative Futures

Scholars Portal Day, December 2, 2014

Martha Whitehead, OCUL Chair

# Today

- Collaborative Futures recap
- Project phases
- Next steps
- Discussion
  - What do you like about this project?
  - What are your concerns or questions?
  - What do you want to know more about?

# Recap

## 2012-13, understanding the URM landscape

- Questions about the future of SFX and RACER
  - Some members anticipating replacing LMS
  - Web Scale Library Systems Summit, Toronto, Feb 22, 2013
  - Collaborative Approaches Task Force formed
- URM scope:
- Online user services
  - Technical services, collections management
  - Information systems management
  - Assessment (library measures)
  - Workflow and staff deployment in all these areas

# Recap

## 2013-14, articulating opportunities/challenges

- Report of the CATF to OCUL Directors, Nov 25-26, 2013
  1. Collaborate Resource Management Strategy, enabled by a next generation library resource management system
  2. Shared Print Management
  3. Information Technology Collaboration
- Webinars:
  - CATF report, Mar 3, 2014
  - Distributed Shared Storage Strategies, Mar 10, 2014
- Collaborative Futures Summit, Mar 20-21, 2014

# Recap

June 19, 2014 - Collaborative Futures set of projects

- State of Play of the ILS – A Complex Feasibility Study (including voluntary Total Cost of Ownership study)
- E-resources description and management (including consideration of Scholars Portal services)
- Print management and preservation (including consideration of the future of Scholars Portal services and revising Thunder Bay Agreement)

# Recap

June 19, 2014 – General Plan

- 2014-15, developing the ‘business case’/study
  - Project manager recruitment, Fall 2014
  - Project charter for ‘business case’, Fall 2014
  - Business case development, Jan-July 2015
- 2015-16, implementation as appropriate
  - Recommendations and implementation plan, Fall 2015
  - Possibly funding proposal to Ontario Buys for 2016-17

# Project Charter

## ***The vision***

*By 2020, OCUL envisions our users experiencing a large, diverse Ontario-wide library collection rather than the collection at their specific institution. They can move seamlessly between different types of content (electronic and print, books and journals, etc.) using multiple interoperable platforms whose design is evidence-based. Via search engine optimization and advanced authentication, many users experience OCUL resources from outside of Ontario. Users have access to more books and specialized content than ever before, and these resources are incorporated into their research, learning and teaching workflows.*

# Project Charter

## ***The vision cont'd***

*By 2020, OCUL library employees will perceive collaborative work as a given – they are part of a network and naturally work within it. They are likely to work on a daily basis with staff at other OCUL libraries, and are familiar with OCUL wide standards and policies. They may be doing work on behalf of another institution for the good of the OCUL community, and participate in opportunities for job sharing, secondments and exchanges within OCUL libraries.*



# Keys to achieving the vision

1. Implement shared next generation library services platforms
2. Collaborate to manage and preserve print resources in a sustainable system
3. Collaborate to effectively use shared systems to manage electronic and print resources

# Phase 1: Feasibility Study

## (AKA “Business Case”)

November 2014 – July 2015

- Overarching tasks
  - Create the shared vision and case for collaborative print and digital resource management
  - Agree on a collaborative framework
  - Develop principles and framework for resource allocation and a cost-share model
  - Identify/recognize institutional values/philosophies
  - Build relationships (meetings, webinars, etc)

- Financial analysis: voluntary TCO study
- Shared next generation library services platforms: market research, potential models for a shared platform
- Managing/preserving print resources: best strategy for broad collaboration
- Using shared systems for resource management: business process analysis and common workflows

- Business case, to be
  - Based on all the above activities
  - Thorough and concise
  - Visionary and pragmatic
  - Compelling for OCUL, university stakeholders and potential funders

# Decision Point – Summer 2015

- Interim report to Directors in May 2015
- Summer 2015, these are delivered:
  - Voluntary Total Cost of Ownership Study
  - Market Research Report
  - Business Case for Shared Systems
- Each OCUL member decides if it will continue to the next phase

# Phase 2: Implementation Plan and Major Grant Proposal

August 2015 - April 2016

- Business plan (budget and sustainability plan, measures of success, alternate funding models)
- Funding proposal for large multi-year project
- RFP requirements for shared next generation library services platforms
- Agreements (e.g. MOU, SLAs)

# Phase 3: RFP and Implementation

April 2016 – December 2017

- Technology acquisition
- Implementation plan
- Agreements (e.g. sustainability plan, continue to align policies and processes)
- Small-scale collaborative projects
- Scholars Portal repositories TDR status

# Next steps

- Project Manager - Hooray, Amy!
- Steering Committee
- Working groups (to be confirmed)
  - Market Research (ideally with external consultant)
  - Total Cost of Ownership
  - Shared Print Management and Preservation
  - Shared Workflow/Business Processes
  - Communications



# Discussion

- What do you like about this project?
- What are your concerns or questions?
- What do you want to know more about?