

**SOLINET Member Scenario Planning Discussions**  
**Summary Report for the Planning Committee of the Board of Directors**  
**April 23, 2007**

## **Executive Summary**

SOLINET held 12 discussion groups with members around the region to explore their vision of the future of libraries and SOLINET. Discussions focused on three scenarios of possible library futures, developed by the Board of Directors. Participants debated what was likely, unlikely, and missing in each of the scenarios, then identified possible roles for or services from SOLINET that could help members achieve their desired future. This report summarizes the outcomes of all discussions.

The library environment for the next 3-5 years is focused on:

1. New service models for libraries
  - Outward focus on users (less on behind-the-scenes operations)
  - Broad engagement in planning for the future (it is no longer “business as usual” for libraries)
  - Importance of collaboration and partnerships in enhancing, expanding, and re-defining library services
2. Changing role of collections
  - More collections/information on-demand
  - Focus on special, local, and/or unique collections, to raise the library’s profile
  - Shared repositories for print and electronic resources
3. Staff transformation
  - Work re-design focused on user impact and increased efficiencies
  - Need for knowledge and skill development
  - Outsourcing and flexible staffing options
4. Re-purposing buildings
  - More multi-purpose community and collaborative space
  - Less collection/information storage
5. More assessment
  - Value and impact of library; return on community investment
  - User needs and expectations compared to performance and service effectiveness
  - Accreditation standards
6. Keeping up with and in control of technology
  - Use of new technologies/tools for providing or improving services

- Library role in providing technology training for community
- Library investment in expensive, proprietary systems (e.g., ILS) and the potential for open source systems/applications

Recommendations for SOLINET based on this library environment are to:

1. Increase library capacity
  - Provide alternatives to support dynamic staffing situations at member libraries
  - Expand collection resources available to members through collaborative resource-sharing
  - Provide technical infrastructure support for members
  - Offer collaborative access to contracted (outsourced) services
  - Provide programs or services to directly meet needs of library users
  
2. Strengthen library capability
  - Support the development of knowledgeable and skilled library staff
  - Assist libraries in defining their vision and steps for achieving it through consulting activities
  - Assess libraries and communicate their value
  - Serve as an information resource and clearinghouse on best practices
  - Strengthen the library community through activities that support professional engagement and leadership development
  
3. Provide cooperative access to products and services
  - Expand offerings of collection resources and collection management tools
  - Work with vendor partners to improve their products and services to meet library needs
  
4. Support effective digital library collection and service initiatives through activities in addition to those provided through 1-3 above
  - Provide digitization services and/or technology to support conversion of local and special collections
  - Serve as a regional resource for long-term preservation of digital content created by members
  - Provide information on new technology uses and models of adoption
  - Represent members in the development of standards and promote their use
  - Support technology research and development

## **The Library Environment**

The major theme arising from the 12 discussion groups held with members throughout the region in February and March 2007 is “libraries transforming themselves to meet future needs and expectations of users.” Participants saw themselves engaging with users in new ways, to better anticipate needs and provide services and resources that are both valuable and valued within their community. No matter what size or type of library, the focus of all was outward, on increased engagement and involvement with users, heightened visibility, and demonstrated impact in the community. With funding static for many and declining for some, issues of managing technology, staff, collections, and facilities to improve service are serious challenges now and in the future.

The driving forces for libraries are changes in the environment and the expectations of users (or potential users). Users have many more freely available sources of information (good or bad) and there is increased direct competition for many services that only libraries provided in the past. The “digital divide” continues, and despite more people having access to technology at home and work, there is increased and growing use of libraries for both access and training. Technology as a means to provide information and services continues to dominate library development, with its corresponding focus on “behind the scenes” work. At the same time, users want more personalized service and collaborative workspace within a “front-of-house” library that serves as both a resource and dynamic community center.

The six areas of focus for members in the next three to five years are:

- New service models for libraries
- Changing role of collections
- Staff transformation
- Re-purposing buildings
- More assessment
- Keeping up with and in control of technology.

### **1. New Service Models for Libraries**

The library of the future is integrated within and interactive with the community through its services. The library goes to users, instead of depending primarily upon users going to the library. Library staff members more often collaborate with users through social and learning networks. In partnership with other educational organizations, the library’s role in educating users increases in the future in scope and content, including information literacy, technology training, skills development (such as reading and writing), tutoring, and advising. Highlights from sessions include:

- The library as community portal
- Focused user-centered collaboration
- Customized services to users and community

- Services provided through the web and face-to-face, with users expecting instant access, personal assistance, and self-service options
- Web search engines are how people find libraries; need to put libraries in users' paths and not expect people to come to library or use library systems
- Course management systems as gateways to libraries
- Community of users less defined, and broader than library as place
- Libraries need to understand expectations of both customers and potential customers
- Libraries add value in a competitive information environment.

## **2. Changing Role of Collections**

Collections and information resources provided by libraries are a mix of electronic and print, with the former expected to increase. On-demand resources (purchasing, leasing, pay-per-view, and printing) will be more important to serve users in the future, although some see potential library infrastructure barriers to quick adoption (cost, copyright, equipment, funding allocation). Local and special collections are the focus of more attention, as resources that make the library unique. Digitization of special collections is seen as a means to enable users to discover and access such resources and as a tool for increasing the visibility of the library. Collaboration is a valuable tool for libraries to acquire, provide access to, and preserve resources, including collaborative licensing, regional lending and document delivery, and shared electronic and print repositories. Traditional acquisition, cataloging, and processing functions are changing, representing both opportunity and threat. Highlights from sessions include:

- Library as creator of resources, especially through digitization of special collections
- Library role in identifying/acquiring information directly from creators (for example, web-based resources such as blogs, institutional repositories, e-government resources)
- Special collections and archives “coming to the front” as the web makes them more discoverable, providing an opportunity to showcase what makes the library unique (a “differentiator”)
- Collaborative digitization; on-demand digitization
- Persistence of access to e-information is a problem
- Regional print and electronic repositories for preservation and collaborative access
- More materials are acquired pre-processed by the library
- The role of the OPAC is changing, becoming more of an inventory control system than a point of access for users
- The future of cataloging is a hot issue for libraries as they assess efficiencies and user expectations. Cataloging is seen by some as less a discreet function and more integrated throughout library operations and services.

## **3. Staff Transformation**

Libraries are looking for flexible staffing options, with adaptable staff that have the skills needed to advance library services. With an outward shift on collaboration with users, improved

services, and stronger integration within the community, libraries talk about “re-allocating” resources and “re-engineering” staff roles to better anticipate users’ expectations, develop services, and increase engagement with the community. Libraries look at expanding “staffing” through outsourcing labor intensive or repetitive tasks, using temporary or contract staff, and expanding the roles of non-MLS employees in operations and services. Being able to pay competitive salaries to attract employees with the needed skills, especially in the technology arena, is a major challenge for libraries. In addition, there is resistance to change (of library services and of staff roles), and staff development needs will be constant and increasing as the library workforce and user expectations change. Highlights from sessions include:

- Outsourcing technical services and processing
- Re-allocating staff to “front-of-house” roles
- Alternatives to staffing through short-term contracts, expertise on demand, remote services, partnerships with other units, multi-tasking and multiple role assignments
- Creating and adding staff that are forward-thinking, technologically-savvy, and service-oriented
- Need to provide basic library education (for new staff without a library background and to address shortage of trained librarians)
- Leadership development needed for next generation of library leaders
- Changing job descriptions, changing nature of library work.

#### **4. Re-purposing Buildings**

The library as place is critically important to users, with space designed to serve multiple purposes including collaborative work, meeting and social networking, research and study, teaching, and community center. Reconfiguring and renovating libraries can re-purpose older buildings to meet the social and technology needs of users. Remote storage of collections is likely only for larger libraries, although many are interested in shared storage facilities and shared repositories of print and electronic materials. Highlights of sessions include:

- Social space, quiet space, collaborative space
- Regional repositories for off-site print storage of commonly held serials (one print copy of serial in storage [last copy], all other copies electronic)
- Centers of research, with joint storing of back files of journals and low-use materials
- If storage is built, it will typically be communal; few individual library systems or campuses will build it
- Additional buildings and more space are unlikely.

#### **5. More Assessment**

Libraries are accountable to their communities and face increased pressure to demonstrate their value. Assessment of user needs and expectations help the library define and improve services. Performance assessment enables the library to see how well it is meeting users’ needs, in an efficient and cost-effective way. Both provide information to the community on the value of

services and the return on the community's investment. Integrating assessment into library operations and services and reporting to users improves the visibility of the library as a critical asset in the community. Highlights from sessions include:

- Return-on-investment reports, to prove the library's worth and value in the community
- Knowing what users' expectations are; they seem to be high and in some cases beyond the library's knowledge, resources, and/or capabilities
- Assessing the impact and outcome of library services, to demonstrate relevance
- Assessing efficiency and cost effectiveness of library services, to demonstrate viability
- Shifting accreditation requirements for academic libraries, with increased focus on the impact of the library on student learning
- Libraries need tools, best practices, expertise and training in assessment techniques
- Need the cooperation of vendors to measure, assess, obtain data
- Decisions are more data-driven.

## **6. Keeping Up with and in Control of Technology**

Technology is critical to the library's provision of services, to reach users and meet their expectations, expand access and increase the visibility of the library, and address the educational and economic development needs of communities. The library is a source of providing technology for the community; it also depends on technology to operate. Integrated, interactive services require library knowledge of the technologies that patrons (and potential patrons) use and the skills to apply them in the library environment. Integrated library systems (ILS) will remain important for inventory control (holdings, circulation, etc.), but OPACs are seen as declining in importance as an access point to library resources. Open source applications and web-based applets are tools for expanding functionality and customizing technology for the library's and user's needs. At the same time, the cost of ILSs and the proprietary control of a limited number of vendors are concerns. Highlights from sessions include:

- OCLC will continue to re-invent and to integrate libraries into the web, but will face more competition in the future
- The online catalog is no longer the focus of the library; some see Google as the primary catalog and access point to the library's collection, not the ILS
- Monopoly-like environment among vendors, with fewer vendors and less difference among them
- Interest in and increasing dependence on collaborative open source applications to address specific needs
- Interactive technologies and just-in-time technologies for delivering services
- Gaming and social networking increasingly important to users
- Increasing integration of the library into the web

## Recommendations for SOLINET

As members change to better meet future needs and expectations of users, they look to SOLINET to support their transformation and provide services that build and sustain forward-thinking, outward-focused, service-oriented libraries. Cooperation and collaboration remain valued strategies for members to achieve shared goals, extend the reach of collections and services, and make the best use of limited resources.

Discussions in all groups highlighted a significant challenge for SOLINET in serving libraries along a broad continuum of need and focus. Some libraries have the resources to look at future services in new ways. Others operate in a traditional environment and are unsure of how or if they should change. In-between are many variations of libraries with different interests and needs, and limited resources available to develop new services and implement change.

Recommendations for SOLINET's future services fall into the following four areas:

- Increase library capacity
- Strengthen library capability
- Provide cooperative access to products and services
- Support effective digital library collection and service initiatives.

### 1. Increase Library Capacity

Given rising opportunities but limited resources and static funding for many members, creative solutions to increase the capacity of libraries will be critical to expanding and strengthening services and resources for users. Users want access to more information resources, but libraries have limited acquisition budgets and storage capacity. Libraries want flexible staffing options to add capacity when and where it is needed. Technology infrastructures are costly to maintain and update, but critical to service. SOLINET can enhance library capacity by focusing on services to:

- Provide alternatives to support dynamic staffing situations at member libraries through such activities as
  - Temporary or project staffing services
  - Services to handle functions libraries may want to outsource, such as cataloging and digitization.
- Expand collection resources available to members through collaborative resource-sharing activities such as
  - Regional, end-user oriented interlibrary loan and resource sharing systems
  - Collaborative repositories for long-term storage of analog/digital resources.
- Provide technical infrastructure support for members through such activities as
  - Hosted technology services and/or platforms
  - Support for the development and/or application of open source applications
  - Collaborative development and support of digital asset management systems.

- Offer collaborative access to contracted (outsourced) services in such areas as:
  - Digitization
  - Cataloging
  - Storage (analog and digital)
  - Technology management.
  - Temporary staffing
  - Services available from other libraries, such as digitization or storage.
- Provide programs or services to directly meet needs of library users, such as
  - Creation and provision of educational programs for library users, to provide technology instruction, assistance in using library resources/databases, and information literacy training
  - Creation and maintenance of discipline-based portals for digital content
  - Metasearch and federated search tools.

## **2. Strengthen Library Capability**

Members recognize that growth, development, and transformation of libraries depends on the capability of those organizations to recognize needs, embrace opportunities, envision the future, and be flexible and agile in a changing world. New service models and effective engagement with users and the community depend on vision, leadership, planning, and commitment to change. SOLINET can “help libraries help themselves” by providing services to:

- Support the development of knowledgeable and skilled staff through such activities as
  - Expanded training in such subjects as the application and management of technology, work redesign processes, assessment (user expectations, library performance, return on investment), space redesign, digital collection creation and management, service improvement, and library values
  - Provision of “how to” resources through user groups, forums, institutes, online tutorials, and web-based seminars
  - Technology alerts and updates, and their impact on libraries.
- Assist libraries in defining their vision and steps for achieving it through consulting activities focused on such areas as:
  - Workflow assessment and work redesign
  - Assessing and implementing new technology
  - Strategic planning
  - Space redesign
  - Assessing users’ needs and expectations and planning responsive services.
- Assess libraries and communicate their value by
  - Hosting studies to gather, analyze, and provide data of value to members (including user expectations and needs, performance benchmarks, service usage, and return-on-investment)
  - Produce reports that communicate the value of libraries

- Establish benchmarks and provide tools and best practices for members to perform ongoing assessment.
- Serve as an information resource, “ready-reference” service, and clearinghouse on best practices in such areas as assessment, outsourcing options, product comparison, product use, technology implementation, and library policies.
- Strengthen the library community through activities that support professional engagement and leadership development, such as
  - Facilitation of peer-to-peer networking through user groups, working groups, and tools to supporting ongoing professional dialogue
  - Collaborative research projects, environmental scans, and “think tanks” on library issues.

### **3. Provide cooperative access to products and services**

Members continue to value cooperative access to products and services that support the library infrastructure and serve patrons. Group access saves money and enables members to expand their capacity. SOLINET offers cooperative access to many products and services now, with an emphasis on electronic resources. Areas identified for growth by members include:

- Collection resources and collection management:
  - Products that support effective management of digital collections
  - Collaborative models for on-demand services (access, acquisition, and/or printing)
  - Collaborative models for pay-per-view/use products
  - Expanded digital content, especially audio and video content, and more products modeled on the netLibrary shared collections.
- Work with vendor partners to improve their products and services to meet library needs for
  - User-friendly interfaces and improved mechanisms for user input
  - Effective metasearch and/or federated searching
  - Data that supports library assessment and reporting
  - Archiving and preservation of access.

### **4. Support effective digital library collection and service initiatives**

Members see continued growth of the digital library in the future, to provide both services and collections. Analog collections (books and printed serials, audio and video recordings, archives and special collections, etc.) and face-to-face services also will continue in the future as critical components of library service. Librarians are looking to expand their ability to manage digital libraries and integrate traditional and digital collections and services. Creating library capacity and capability to manage digital libraries is part of items 1-3 above. Additional areas in which SOLINET can support members’ digital libraries include:

- Provide digitization services and/or technology to support conversion of local and special collections
- Serve as a regional resource for long-term preservation of digital content created by members
- Provide up-to-date scans of the library technology environment, alerts on new developments, and “how to” models for applications of technology in libraries
- Represent members in the development of standards and promote their use within the membership
- Support technology research and development among small groups of members, and then facilitate rapid adoption within the broader membership.