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HIKE Project. Planning for the future: investigating new library services platforms

Briony Heyhoe-Pullar and Amy Devenney

The HIKE (Huddersfield, Intota, Knowledge Base Plus Evaluation) project was one of a series of projects funded by Jisc to investigate the changing library landscape. It is widely believed that the next couple of years will witness radical changes in the academic library world as many of the traditional Library Management Systems (LMS) are declared unfit for purpose and replaced by new library services platforms.¹ The main criticisms levelled at the LMS's are their reliance on a dedicated team of specialists to support them; their inability to cope with workflows for electronic resources; and their lack of integration with important university systems, such as financial systems, which results in duplication of work and increased risk of error.

The market is now seeing library service platforms, powered by a comprehensive knowledge base, emerge on to the market in competition with the LMS.² One such system is Intota from Serials Solutions. It is thought that Intota will provide librarians with more time to devote to mission-critical activities because it is based around the principles of linked data, interoperability and lower total cost of ownership which will allow them to work with greater efficiency.

Developed by Jisc Collections on behalf of HEFCE and Jisc and released in September 2012, Knowledge Base Plus (KB+) aims to help alleviate some of the issues faced by academic libraries in the management of subscribed e-resources.³ The service has been developed based on the experience of Jisc Collections in dealing with electronic resource management and on the conclusions drawn from the work of the SCONUL Shared ERM requirements project.⁴ KB+ will reduce duplication of staff time and effort in the population and on-going maintenance of individual knowledge bases across institutions, and will encourage shared community activity and collaboration to minimise the amount of work undertaken by each institution.

The HIKE project was undertaken by Computing and Library Services at the University of Huddersfield. Working closely with KB+ and Serials Solutions and their Intota development team the project ran between July 2012 and February 2013. The project aimed to carry out a full assessment of the compatibility of KB+ with Serials Solutions and an evaluation of the suitability and potential of Intota as a replacement to the traditional LMS for both Huddersfield and the higher education (HE) market. To achieve this, the project developed work already undertaken by Huddersfield during Phase I of the KB+ project and as an early adopter of Summon⁵ and the TERMS project.^{6,7} The project also investigated the cultural change that would be required to implement such an innovative system as Intota and suggested how to manage such a change in order for it to be successful.

The aims of the project were achieved by carrying out a number of different tasks which are briefly described below:

- An analysis of the workflows of the main processes of the Acquisitions and Journals teams at Huddersfield. This aimed to identify the problems and frustrations library staff and users feel with the traditional LMS and establish areas where Intota could create efficiencies. This then allowed the creation of a 'wish list' which emphasised a number of areas within the workflows where it was felt Serials Solutions and KB+ should consider when developing their systems with the aim of creating efficiencies.

- The population of KB+ with journal subscriptions and 50% of licences held by Huddersfield. This allowed the project to provide feedback to the KB+ team for consideration when developing the system.
- The population of Serials Solutions 360 Resource Manager with the remaining 50% of the licences. This allowed a comparison between Resource Manager and KB+, which examined the aims and objectives, data population and functionality of each of the two systems. The comparison was concluded with an ideal workflow for each system and development recommendations for Jisc Collections and Serials Solutions.
- An examination of the interoperability required of Intota. This began by identifying the systems with which interoperability was desired before evaluating the importance of each system to the running of the library. The interoperability of Intota with Dawson Books, Patron Driven Acquisition and university financial systems were then investigated in more depth.
- An investigation in to how the implementation of a new system may lead to significant cultural change. This began by assessing why the successful management of change during the implementation of a new system is crucial for the adoption to be successful and the system to achieve its potential. It then moved on to consider how to manage the concerns of staff to ensure they are happy and comfortable with the change.
- The Jisc HIKE Project Workshop held on 26 February at the University of Huddersfield. The workshop aimed to gather information from UK Serial Solutions customers to allow us to evaluate the broader suitability of Intota for UK HE. The day began with presentations by Jane Burke (Senior Vice President, Strategic Initiatives at ProQuest), Damyanti Patel (Jisc Collections) and the HIKE project team.⁸ It then moved on to hold discussion around three main areas:
 - Workflows
 - Interoperability and API's
 - Cultural change.

The project blogged its findings⁹ throughout its duration, in addition, a final report is also available.¹⁰

The HIKE team were curious to see if other HE institutions were experiencing the same issues to ensure that our evaluation was an accurate reflection, or if they were facing different issues which would need to be factored into our evaluation. The team also want to disseminate our findings so that they could be used by other institutions. To this end the team ran two workshops at the NAG conference *Sharing Today, Securing Tomorrow* in York.¹¹ After presenting an overview of the aims and objectives of the project, a brief explanation of what the project entailed and our findings, the workshop turned the discussion over to the floor.

The delegates were divided in to groups and were given two activities to discuss, the first around workflows and interoperability, and the second around cultural change. Each group were first asked to identify three points of pressure within their current workflows and suggest how efficiencies could be made, before being asked to identify which systems they would like interoperability with. Although there were various different pressure points identified one of the most common was the lack of integration between the LMS and the university finance system. This not only leads to duplication of work as financial information has to be input twice, but also means that the finance system is the last thing to be updated. Therefore information does not appear in real time. Some of

the other points to come out of the discussions were lack of interoperability between student records and the LMS (see figure 1); lack of interaction with reading list software; and lack of integration with the supplier's database for book ordering. Other systems which the groups felt needed to be included were the repository; the VLE; HR systems; e-payments for students; social media sites and something to facilitate the resale of books back to students.

For the second discussion, the delegates were asked to think about change management and the cultural shift involved in the implementation of a new system. They were asked to highlight three concerns that staff may have and three ways in which to manage these concerns (see figures 2-4). This led to some really interesting discussions, with some of the most common concerns being around loss of job security; changes to people's roles leading to feelings of incompetence and a lack of control, to worries about how the service might suffer, with things like the impact on service continuity; a mistrust of the new system; and concerns over who will check that things are working if processes are automated. There were also some really useful ideas on how these concerns could be addressed, which included ensuring staff are fully involved from the beginning; letting them identify the issues with the current system and the ways that these issues could be resolved to give them a sense of ownership of the new process; taking the concern that their roles may change, and turning it in to a positive by highlighting that their role will be more varied and less repetitive, and offering it as an opportunity to learn new skills; informing staff on what their additional time will be spent doing and what benefits this will bring to the library; and involving them in user groups and workshops where possible.

The feedback from the workshops has been really positive, with a number of people keen to build on the work that HIKE has already done. There is the scope for possible collaboration and working with colleagues from other institutions to come up with a specification document for a new library services platform.

What both the HIKE project, and the resulting workshops have highlighted, is that no matter what the institution, or the systems that institution uses, the staff are experiencing the same issues in their day to day work, often leading to duplication of work and frustrations, and ultimately affecting the quality of service for the end user. Could a new library services platform be the answer to all our prayers? – watch this space!

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