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Bright futures: getting a sense of direction

Good morning

It's a pleasure to visit you here in Lodz. Thank you very much for inviting me.

As you can see from the title of my presentation to you this morning, I am optimistic and excited about the future for libraries. But that doesn't mean that I think our future libraries will be the same as they are now.

In this presentation I will try to identify some of the trends and signposts to the future that are already available to us, to consider what these may mean for the future development of libraries and how we may influence our future success. Even if you don't agree with me I hope I will at least be provocative enough to get you to think beyond today and become visionaries of your own bright futures.

But before looking to the future, I would like to take you back a century to the American Midwest. A century ago in 1908 the first Ford Model T car was assembled in Detroit, USA. Over the following 20 years, 15 million Ford Model T cars were sold. A century ago, there were many small prosperous towns in the Midwest. Each small town bustled with trade and activity. Each was quite self-sufficient with for example its own opera house, banks, hotel, shops and so on. With the arrival of the car, many of these small towns fell into decline and individual fortunes were lost. The mass market car caused massive social change by creating mobile citizens, who could now easily travel longer distances than one day's journey by horse and cart to the nearest small town. I am sure the wealthy business owners in those small towns asked the question 'Will I survive?' Of course some did survive and some businesses and towns flourished and grew, attracting more people with new developments and innovation that matched the expectations of the newly mobile citizens. They added new value in the eyes of their new mobile citizen customers.

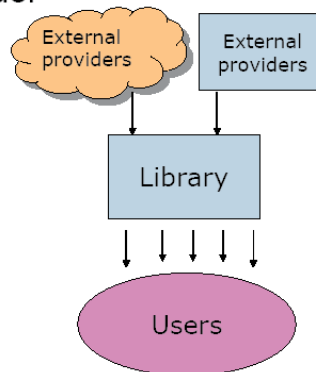
Let's come up to date now, a century later and look at the similar massive social change arising from the impact of the internet and personal technology on communications and access to information and services. This has created digital citizens with new expectations. Not only that but children today may well grow up to enjoy holidays in space – Richard Branson of Virgin Atlantic is investing in providing commercial space flights within the next 10-15 years – and have an average life expectancy of 100 or more. They will have a different perspective on life from many of us in this room today.

How many of you carry personal technology devices – perhaps a laptop, iPod or MP3 player, cell phone, PDA, digital camera? Did you carry all this personal technology 10 years ago? Probably not, but it had been invented and was in use. And before you

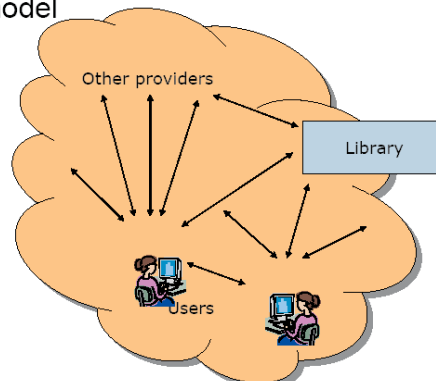
start thinking – like some of my staff at Hertfordshire when I asked them to think about the next two decades – that 20 years is a long time and you don't need to think about the impact of this change because you will have long retired from work, I would point out to you that I think we are already at the 10 year mark, halfway through an equivalent 20 year period of change. We have seen a lot of change over the last decade, but the critical difference for us now is that the pace of change is exponential now that a high percentage of the population has become a mass market of digital citizens. Now as librarians you are asking 'Will we survive?' So we must think about the expectations of our digital citizen users. We need to shift the focus of our thinking to people, to our customers and their expectations, and not just to the technology.

So how does this change alter the role of the library? In the old model, our users expected the library to provide all the information and services they needed for their study and research and to be the single gateway to the wider wealth of collections and information beyond the library. This model upholds a traditional notion of the library being 'all things to all people'. This model represents a linear monopoly relationship between library and its users built around a high emphasis on structure and process. The value of the library to the user is inherent in the monopoly and the lack of choice of alternatives.

Old model



New model



In the new model, our users are digital citizens living in the internet world with a choice of many routes to information and services and with easy peer to peer communication. The library also lives in this internet world as well as remaining a physical place. It would be easy to see this new model as presenting a competitive situation, in which the library has to try and outdo the alternative providers to retain its users. My view is that a competitive approach is unsustainable and will ultimately be unsuccessful. A collaborative approach is more likely to succeed; a strategy whereby the library draws on and integrates the best of what is available from many providers, develops its own complementary specialist provision and adds value through customization and services for its digital citizen users.

We are already in the internet world. The digital environment is already the norm for our users. Have you taken account of this in your library strategy, structures and processes? Or are you still dealing with the digital environment as a 'bolt-on' additional part of the library. I was recently asked to answer a questionnaire about e-roles in the library? I could only make one response – that every role is an e-role. What happens to your view of your library and to your strategies and services when you turn the situation around and make digital the norm and treat print and place-related provision the exception?

I would like to spend a few minutes considering the impact of making the digital environment the norm on some of our core library concepts: viz.

- understanding of our users
- collections
- study facilities
- services
- management, staffing and skills, business processes

and try to draw out some of the distinctive value-added services that may give the 'new' library a unique identity and role.

Understanding our users

First of all, we need to get to know the digital citizen. Personal technology and the pervasive internet supports anywhere, anytime inter-action. The digital world is 24/7. Google has gotten us used to easy access and immediate responses, and therefore impatient with delay and difficulty. Our personal technology lets us combine things and personalize them, so this is what we now expect everywhere. Poor design and presentation has become synonymous with poor quality products and services. We want the pervasive benefits of the digital world but we also expect privacy and security in on-line our transactions. Identity theft is a growing problem. As consumers we are aware of our rights and not afraid to demand them. One of the major impacts of the digital environment is its effect on how we do things and on our learning practices. In the digital environment, we can do several things at once, mixing different activities. I see our students at Hertfordshire combining doing coursework, engaging with friends through MSN, reading email, texting and speaking on their mobile phones and checking the football on the web. The linear approach I grew up with has gone. This has implications for how we present

information and services and communicate with our users; we need to focus on bite-size self-contained chunks that allow users to dip in and out in any order, rather than long step by step instructions and continuous prose.

Then we need to challenge ourselves by asking how well we really know our users. Libraries have long prided themselves on excellent customer care and high customer satisfaction levels. But are we now complacent about this? Our traditional approach has been to use satisfaction surveys to find out whether our customers are happy with what we provide. Do we think we know what our users expect or do we actually know? How many of you do systematic market research in different user market segments to inform your forward planning? How many of you collect data about individual users, or cohorts of users and then analyse and use this to customize and match services to different user groups. How many of you really analyse and use all those usage statistics you collect. Just looking at total figures can hide changing patterns of use. For example at Hertfordshire, within our consistent overall annual level of book issues and loan renewals at around 1.6-1.7 million a year, the patterns of use are changing. Analysis of the detailed figures shows a trend of a decreasing number of active borrowers but with each active borrower making higher use of the lending services and keeping loans much longer through an increasing number of loan renewals for each book issued. Until I did this analysis, I had been puzzled by the feedback from a student focus group who reported that they did not like borrowing books as they didn't want to have to 'carry heavy stuff' around with them. It seems then that some of our users are ready for the e-book, at least for those occasions when reading a chapter or section is relevant rather than cover to cover reading. We need to develop our business intelligence to identify what really matters to our different users, to find out what it is they value.

Collections

For me 'Collections' represent a wealth of knowledge and information, valuable for their content. In planning for the future it is important to move away from a definition of collections as relating to books and other physical objects.

We have reached a point where it is quite possible to have journal collections that are pre-dominantly digital. At Hertfordshire our journal collections are over 80% e-only. I expect there to be rapid change from printed books to e-books over the next five years with the impact of e-book services that are now viable and with a growing programme of mass digitization of books. We will also see increasing amounts of free information. Open access initiatives will clearly contribute to the range of content freely available, but this is relatively minor by comparison with the cultural impact of the web and the recognition by all sorts of organizations of the benefits of providing as much information as possible without charge. In the UK just now a strong lobby is pressing the Government to make data collected with tax payers money such as geographical survey data and maps freely available. This is already the case in the USA and such data has for example underpinned the development of Google Earth. The overall amount of information available also continues to grow.

Already our digital citizen users are loading audio books on to their i-Pods for their holiday reading and downloading films, music and podcasts is commonplace. At Hertfordshire the Vice-Chancellor and several library staff have blogs available to all staff and students on our intranet; wikis are being used by students to manage their groupwork; and we are just implementing video streaming to deliver moving image services for both locally recorded material and commercially procured materials. How are you integrating this wide range of content and sources in your collections?

The management of virtual collections challenges many of our structures, processes and practices. In general terms virtual collecting is not a new activity; for example bird watchers collect sightings of birds, rather than the actual birds, and record the 'birds' in their collections with systematic notes, photos and ticklists. This is their metadata. For a library's virtual collections, there are diverse and multiple 'holding' locations, with the majority external to the library. The library will not own or control most of the content, but will need to keep track of it and ensure consistent reliable access to it. The definition of new criteria for determining and selecting authoritative sources presents a challenge. Every library will need to develop new collection and content policies. Our library systems will need different capabilities. For national and other designated research libraries with curatorial and preservation responsibilities, there will clearly be significant and difficult issues to address in respect of digital collections, but these need more detailed consideration than time allows this morning.

Our supply chains are changing. We have certainly seen significant change in the periodical supply market in recent years. Library supply is no longer predicated on a traditional procurement process and funding capacity. We may need different types of supplier, perhaps even resource discovery agents who alert us to relevant digital content for our 'collections'. Or perhaps there is a daily task for librarians to 'crawl' the web to discover relevant content for their users.

The music industry provides us with a useful example of re-structuring for the digital citizen. The record producers have actively tried to protect their traditional businesses against piracy and against technological developments for music distribution such as Napster. But it was Steve Jobs of Apple rather than the record producers who saw that a different model was required. He negotiated with the major record producers to get their music output as content to populate i-tunes. The i-tunes model provides a single service for a wide range of music with 24/7 availability and simple easy access, pricing and payment methods. This has probably done more to counter piracy than the legal actions of the record producers.

It seems to me that the 'mash-up'¹ is one of the key value-added services of the 'new library'. We need to go beyond the past practices of providing relevant collections and allowing our users access to them. We need to pro-actively use the content of our collections to select, package and deliver 'mash-ups' to specific users and groups of users. The 'mash-up' could perhaps be seen as a new sort of reading list complete with all the

¹ A 'Mash-up' uses content from more than one source to create a completely new service. Wikipedia, June 2006

content. Furthermore we need to work in partnership with faculty and teachers to identify content that is of value to our users, to compile the ‘mash-up’ and to integrate it into our users’ learning and research environments. Many academic institutions now have virtual learning environments (VLE) supported by systems such as Blackboard. How are you integrating and customizing your collections and content, and support for your users through the VLE. At Hertfordshire, each of our information professionals is a named contact for a designated School of Study. S/he works with the academic staff and students in that School to identify and support their needs with content, help, news and inter-active exercises such as quizzes, integrated with the learning and teaching materials for their course modules in our StudyNet VLE.

Study facilities

If so much is on-line, why will users want to go to the library as a physical location? We should expect the use of our reading rooms and study suites to change. They will continue to be places for learning and research, but much more as well. At Hertfordshire we have found that our students expect a holistic experience. They don’t expect to have to go to many different locations for what they see as related activities. For the past 10 years we have integrated our academic support services, bringing together, library, computing, media, careers advice and guidance and maths support services into one learning centre. We differentiate a variety of study environments by how our users wish to study (eg in noisy groups, in silence, over a cup of coffee) rather than according to what they wish to use. The demand for groupwork study space continues to grow. Students expect to meet their friends; to study together over a cup of coffee; and to carry out many tasks on-line and in person simultaneously in non-linear mode. Many students now carry their own personal laptops. The seamless use of laptops between home, library, teaching room and workplace gives us a strong indication of the need for a continuum of experience for our users across all of these locations.

The example I wanted to use to get you to think about the role of the library as a physical location is that of Seven Eleven Japan, a large chain of small local shops in Japan². They have been very successful by relating their strategy directly to the needs and expectations of their local neighbourhoods. They have several deliveries a day so that they can provide different fresh foods for different types of meal time; they have on-line ordering (eg from the office during the day) with collection from the shop on the way home; the shops even act as despatch and delivery points for other goods for their local customers. Seven Eleven Japan have capitalized on their locations and focused on provision and services that directly serve the local customers in their neighbourhood. I am not suggesting that in the future libraries will have to offer foodstuffs or despatch services but that you should ask yourselves ‘What is it about our library and its location that needs to be exploited to better meet the expectations of our users?’

Much research is going on currently into learning spaces and the relationship between e-spaces and physical learning spaces. I would draw your attention to a JISC-

² Seven Eleven Japan. Case Study from Graduate School of Business, Stanford University, 2005

funded project in the UK³ on how innovative technologies are influencing the design of physical learning spaces. Libraries are learning spaces and will need to draw on such wider considerations in planning their future study facilities.

Services

The lending services we have today form a major part of the public perception of what a library is. But the design and operation of our lending services is directly attributable to the nature of our collections as large repositories of physical items. Lending services are about providing user access to our printed book collections. Unfortunately the operational parameters of our lending services have become an entity in their own right and we initially saw e-book schemes that emulated the same parameters, such as issuing a book to one user at a time, a practice entirely inappropriate in the digital environment. For the digital environment we need different criteria that take advantage of the medium, such as self-service, easy immediate access, on-line shopping cart, personal audit trail of activity, hints about what else might be useful, even perhaps weekly special offers. There are many examples from supermarkets to Amazon.com that we can learn from in developing enhancements to user access to our digital collections. For the next 10 years or so, the library of the future will need to decide how to handle as an exceptional service, the loan of the residual printed book collections. Will our users expect books to be batched up ready for collection or delivered to them at home? I already have examples at Hertfordshire of academic staff who will order a book from Amazon rather than wait for the library copy to be returned and delivered to them from another campus.

Our reader services, enquiry points and helpdesks will probably see less and less of our users in person, but we will increasingly need to support them through a range of on-line inter-actions. This will include providing on-line help, wikis, blogs, news, hints and tips, etc on web pages or through the institutional VLE; running and participating in on-line discussion threads; and holding regular internet chat session with users as a virtual helpdesk. At Hertfordshire, our induction and information skills for students are provided as inter-active sessions through our StudyNet VLE. The on-line help will need staffing resources to maintain the constant attention and updating required. The question then arises as to whether the face to face meeting with our users will just replicate the on-line help or will our users value the face to face contact with the librarian more and therefore expect to get more from it? Will the face to face appointment become a consultancy session for more substantial advice and guidance? Will you charge a fee for the face to face consultancy session as an extra service?

We will also need to revise our terminology. We need to use the terminology familiar to our users, rather than our library jargon. A student at Hertfordshire recently wrote a short on-line guide for other students about what he called 'book skills'. Some of my staff were critical about the informal terminology 'book skills'. Others challenged them accusing their colleagues of writing as if for other librarians rather than for our users.

³ Joint Information Systems Committee. Study on How Innovative Technologies are Influencing the Design of Physical Learning Spaces in the Post-16 Sector, 2005 (www.ldu.bham.ac.uk/espaces/)

So is the future library something different? Or will a library still in essence fulfil the same role as now? I think the core concepts will remain the same. We will continue to need to understand and support our particular user community; we will develop and manage collections of content that are relevant to their learning and research needs; we will continue to provide study facilities and services. So it's not so much what we do, but **HOW** we do it that needs to change. And how we do it will require changes to staff roles and skills and present management challenges.

Information management will continue to be central. The professional expertise of librarians is what is required for our 21st century knowledge society. We should be proud of our information management and metadata expertise and adapt and apply it beyond the traditional library context. New and expanded staff roles will be needed for market research and customer / user relationship management, for marketing, and for collaboration and partnership working with academic faculties and other providers. All roles will be e-roles, with the technical skills to operate efficiently and confidently in the digital environment. Our procurement and acquisitions roles will increasingly become those of resource discovery, negotiation, contract and rights management. And above all attributes such as flexibility, initiative and adaptability will be required.

We will need new organizational structures and working patterns with revised staff roles. We will need updated and revised policies and changed business processes. We will need strong leadership and management skills to effect these changes successfully. We will need to build more partnerships and alliances with academic faculties and other providers. But perhaps the culture changes needed represent the biggest challenges. We will need to re-think our values, key performance indicators and critical success factors. For example the size of the book budget, library space and the footfall through the door may no longer be relevant factors. And above all we will really need to put our users first.

So will we survive? The short answer is YES. Just as some towns in the American Mid West took advantage of the new expectations of the mobile citizen and grew into big cities, so we must take advantage of the expectations of the digital citizen to determine our bright futures. After all, using our expertise, being entrepreneurial, knowing our customers and spotting the next opportunity is what all successful businesses do.

Thank you