Think BIGGER; Amplifying librarianship with state-of-the-art technology

Carl Grant
Associate Dean, Knowledge Services and Chief Technology Officer

June 2016
Agenda

1. Introduction – A story about a research library

2. The 3 things you need to remember at the end:
   a. Have a plan, i.e. know where you’re headed
   b. Think BIGGER
   c. Radically Collaborate

3. Conclusion
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3. Conclusion
University Libraries Strategic Plan
(i.e. know where you’re headed!)
“Vision without action is a daydream. Action without vision is a nightmare.”
Japanese Proverb
Provost Goals

Defined As:

P1. Student Success
P2. Faculty Impact
P3. Community Impact
P4. Brand Equity
The New Horizon for OU LIBRARIES
The University of Oklahoma
University Libraries
Strategic Plan
(turning it into vision & action)
Creating excellence in the library experience: Physical & Virtual

• New Discovery tool (Primo) & LSP (Alma) implemented
• New Website implemented
• Collaborative Learning Commons & Digital Scholarship Lab opened
• Special Collections floor (5th) remodeled

Building on excellence in Special Collections

• Built and opened a new Digitization Laboratory
• Galileo’s World Exhibition launched (2015-2016)

Supporting OU Campus Research

• New Digital Scholarship Lab opened and staffed
• New Researchers Tools Webpage
• Supporting Open Access & Edition Open Access
• New ShareOK repository & Open Journal System (shared w/OSU)
• Open Educational Resources (OER) now supported
• Innovation @ the Edge opened. Innovation Hub – August 16, 2016
• CLIR Postdoctoral Fellow in VR Preservation/Archiving – Sept 1
Figure 6: Change in State Support for Public Higher Education (All Public Colleges and Universities) per Full-Time Equivalent Student, 2008 to 2014

https://www.amacad.org/multimedia/pdfs/publications/researchpapersmonographs/PublicResearchUniv_ChangesInStateFunding.pdf
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Some examples...
Built a DigiLab
Digital Scholarship Laboratory
Major goals of G.W. Exhibition (know where you’re going):

• Celebrate the 125 anniversary of the University.

• Emphasize the library as the intellectual crossroad, bring the University together around the exhibit.

• Everyone, anywhere should be able to go and see it (physically or virtually, now and far into the future)

• Make it appealing to scholars, public & youth

• Show the importance of science and that knowledge builds on knowledge
Highlighting our special collections in a cross-campus exhibition featuring:

- 20 exhibitions
- 7 locations
- 3 campuses
- Virtual website
Featured in main lobby of Library:

- 20 foot replica of Tower of Pisa
  - Built by College of Engineering
  - Operating ball drop simulating Galileo’s reported test
  - Speeds calculated and reported to user
An Exhibition without Walls
20 Exhibits • 7 Locations • 3 Campuses
Website
http://galileo.ou.edu
Drupal based website developed
- Descriptions from the Curator
- Images of every item in exhibit
- Embedded book viewer for most works
- Information on all exhibits, events, programs, educational resources.
- Links to social media.
An Exhibition without Walls
20 Exhibits • 7 Locations • 3 Campuses

OU HISTORICAL TIMELINE

Library Reading Room

Explore OU History
MooMat’s CultureScout implementation of Galileo’s World is downloadable from the App Store.
OU Libraries developed its first mobile app, OU Libraries NavApp

- For iOS and Android
- Provides Bluetooth-beacon-based indoor navigation in OU’s main library (Bizzell), exhibit case-specific content and,
- GPS-based outdoor navigation across the OU Norman campus
Goals of NavApp?

- Unify digital/physical campus resources
- Simplify complex indoor (and outdoor) environments
- Support Galileo’s World exhibition across campus
- Generate campus-wide interest in innovative tool
- Feed useful content based on location and user type
- Provide analytics for gauging resource usage throughout campus
Oklahoma Sooners use beacons, sensors in rooms on massive campus

The University of Oklahoma has created an app that students can use to navigate to group meeting rooms and other locations on campus using Aruba beacons and sensors. Credit: Aruba

Beacon technology still in early-adopter stage, analysts report

The University of Oklahoma has begun rolling out beacon technology to help students find study rooms and class information, central library and other buildings by using their smartphones about the vast campus in Norman, Okla.

U Oklahoma Libraries Launches Navigation App

Patrons at the University of Oklahoma Libraries can now navigate the system’s collections, exhibits and campus landmarks via smartphone. The university has deployed Aruba Beacons and the Aruba Meridian Mobile App Platform to create the OU NavApp, a mobile app that provides turn-by-turn directions, location-based information and educational content to help students, faculty and visitors find their way through the seven-floor, 400,000-square-foot library system.

Photo: Business Wire
2016 Campus Technology Innovators

Education Futurists

University of Oklahoma
Project: OU Libraries NavApp
Project Leads: Matt Cook, emerging technologies librarian
Vendors/technologies: Aruba, Meridian, RFIP
Tablet Displays

Developed a separate app for each nook in Digital Technology Square, including:
1. Dawn of Space Age
2. Mars and the Imagination
3. Quest of Other Worlds
E-Books

- Created “Gallery Guides” using iBook Author
- Offered 2 versions:
  - PDF for people w/o iPads
  - iBook version (fully interactive)
Hackathons

• One U Cup - working on a Galileo's World VR session with Verizon
• Digirlz session, - working on a session with Microsoft
An Exhibition without Walls
20 Exhibits • 7 Locations • 3 Campuses
An Exhibition without Walls
20 Exhibits • 7 Locations • 3 Campuses

GALLERY OF GALILEO INNOVATORS

Brandon Tomlin
Senior Entrepreneur

Early Entrepreneurial Experiences?

bunch of cute kids that everybody came and stopped and

The UNIVERSITY of OKLAHOMA
LIBRARIES
libraries.ou.edu

http://digitalcommons.wku.edu/ebug_newsletter/vol2016/iss1/6
What is the Innovation @ the Edge?

- **Combination of** Makerspace/FabLab/Startup Incubator, Classroom, Seminar Room, Laboratory – Applied workspace.
- A **culture (or mindset) of experimentation** with the latest hardware and software.
- **Constant training, workshops, clubs, and events** to build a supportive, interdisciplinary culture.
What is the Innovation @ the Edge?

- Open to all
- Peer innovators & experts on staff/faculty
- Collaborative Learning
- New methods of pedagogy, research and creativity
Why the Innovation @ the EDGE?

Books/Serials are tools for creating & conveying knowledge

So are Innovation Laboratories for the physical/virtual expressions of new digital knowledge.
Why the Innovation @ the EDGE?

“Academic libraries… the intellectual hub of campus—a place where students, faculty and staff from all disciplines can gather to explore, create and gain new knowledge... by bringing maker spaces into libraries, we can provide more options for self-directed, innovative learning; we can provide a space that acts as an incubator for ideas; and we can provide tools for the rapid prototyping of those ideas.”

http://acrl.ala.org/techconnect/post/makerspaces-move-into-academic-libraries
What are those tools?
Microcontrollers

- Classes taught in use of microcontrollers
- Low barrier to entry
- Supports reproducible research
3D Printing

Physical expressions of virtualization
Dr. Madura's team (our NASA collaborator’s) hints at the potential long-term value of these systems when describing how, "...3D prints and visualizations reveal important, previously unknown [information]...", and, provide new means for, "conveying complex ideas..", (Madura et al. 2015).
Informatics

- Experienced researcher & programmer
- Primarily grant funded
- OU Libraries buys 20% of his time from IT
- Addresses researcher needs at lower-end (where 80% of research is done)

Mark Stacy
Teaching basic lab skills for research computing

Getting Started workshops

Come to one of our 1-2 hour workshops and learn about these exciting technologies and how you can get started with them. These workshops are open to all OU students, staff & faculty.

- 3D Print Workshop
- Virtual Reality Workshop
- Microcontroller Workshop

Virtual Reality

- OVAL
- Developing for Virtual Reality
- VR Videos

3D Printing

- What is a 3D printer?
- 3D Printers
- Lynda.com Training Videos

Microcontrollers

- What is a Microcontroller?
- SparkFun Inventor Kits

Sign up here for Innovation @ the Edge courses:
http://libraries.ou.edu/edge
Host a Workshop

Find out how to host a workshop at your institution or organization

More »

Attend a Workshop

Most workshops are coordinated by local hosts. Find out if there is a workshop in your area or how to attend one.

More »

Get Involved

Data Carpentry is a volunteer effort. Find out how you can be an instructor, help develop content, or support us.

More »
Virtual Reality

Can’t find a 3D representation? Scan it. (But stay within copyright laws)
Virtual Reality

• Featuring the O.V.A.L. – Oklahoma Virtual Academic Laboratory

• Networked (distributed) analysis & manipulation of any 3D asset.

• Remotely upload 3D model from anywhere
A typical day at Innovation @ the Edge
Innovation @ the Edge Website
Innovation @ the Edge

GitHub
Virtual Reality partnerships already being formed across campus (and beyond) with professor(s) from:

- College of Architecture (installing OVAL)
- Chem/Bio-Chem
- NASA
- English
- Sam Noble Natural History Museum
- College of Law (installing OVAL)
- College of Engineering (planning on an OVAL)
- Innovation Hub (installing OVAL).. wait, what’s an Innovation Hub?!!
What is the Innovation Hub?

- Located in the Research Park
- 20K sq ft w/high-end equipment
- Separate/same... staffing as Innovation @ the Edge
- Open to all
- Peer innovators on staff/faculty
- Experts available
- Collaborative Learning
- New methods of pedagogy, research and creativity
What is the Innovation Hub?

Run by multiple units/colleges acting as equal partners:
1. OU Libraries
2. OU Information Technology
3. Office of Vice President of Research
4. Price College of Business
5. Gallogly College of Engineering
Geographically Dispersed Units Involved

1. OU Libraries
2. OU Information Technology
3. Office of Vice President of Research
4. Price College of Business
5. Gallogly College of Engineering

- Innovation @ the Edge
- Innovation Hub
Opening August 2016
Mobile unit we take to local events: Barnes and Noble Maker Space Day, Local Schools/Libraries & University Events
Discovery System: Implementation

• RFP issued - March 2013
• Responses received – April 2014
• Demo’s conducted, staff/faculty/student testing – April 2014
• Product selected – May 2013
• Contract signed – June 2013
• Implementation – Jun-Jul 2013
• Beta testing – August 2013
• Go live – August 19, 2013 (start of classes)
“The MISSION of LIBRARIANS is to IMPROVE SOCIETY through FACILITATING KNOWLEDGE creation in their COMMUNITIES”

R. David Lankes
“So what should we be spending our precious resources on? Knowledge creation tools, not the results of knowledge creation.”

Pg 43. - R. David Lankes
Discovery System: Implementation

“Knowing the relative strengths and weaknesses of our target audiences is the key…”
“We are seeing a reconfiguration of functions in app/mobile environments, as functionality is dis-embedded from the fuller experience and re-embedded in smaller more discrete experiences.”

Lorcan Dempsey, OCLC
Discovery System: Implementation

Remember....

We should support diverse learning styles "on average studies have shown roughly 29% have a visual preference, 34% auditory and 37% tactile"

SMITH (IN TRUNER, T & FROST, T. 2005, 146)
We’re facing a “world where library content is interwoven into a variety of environments where end-users are searching for information.”

Lorcan Dempsey, OCLC
Discovery System: Implementation

So, remember...

Important to be able to completely replace the interface layer the user interacts with via a locally developed or 3rd party interface.

API’s

HTML5

Web Services (REST)

Published by TopSCHOLAR®, 2016
Discovery System: Implementation
Because Discovery needs to happen in all these places:
Discovery System: Implementation

Important to be able to go from this:

- Interface Layer
- Platform Layer: API’s, HTML5, Web Services
- Aggregated Index
- Other resources

“System”
Discovery System: Implementation

To this:

canvas

Blackboard

facebook

Platform Layer: API’s, HTML5 Web Services

Aggregated Index

Other resources

“Platform”
Discovery System: Implementation – V2.0
Discovery System: Implementation – V2.0
Discovery System: Implementation – V2.0

Discover is searching authoritative scholarly content that includes a combination of the resources of the University of Oklahoma Libraries’ vast local resources, plus another index (called Primo Central™) which consists of hundreds of millions of scholarly, multi-lingual e-resources of global and regional importance. These include journal articles, e-books, newspaper articles, reviews, legal documents and more that are harvested from publishers and combined publishing collections, as well as from academic open-access repositories.

Please note that Discover searches the majority of the databases to which the Libraries subscribe. However, some database providers require you to use only their search interface. Those specialized databases are still available under the database links on the library home page.

Discover, in essence, allows you to do one search and find items from OU’s catalog PLUS items in hundreds of general and subject-specific databases. While you are not searching the wide-open Web as happens when you search Google™, you ARE searching scholarly content that has been selected for your use by librarians from around the world.

* Image courtesy of Ex Libris

You can also watch this short video, prepared for students by the company from which we buy access to the Primo Central secondary index.
“If Libraries wish to be seen as expert, then their expertise must be visible” i.e. Discoverable information about services, people, expertise as well as collections.
Discovery System: Implementation – V2.0
Discovery System: Implementation – V2.0
Discovery System: Implementation – V2.0
Discovery System: Implementation – V3.0
Discovery System: Implementation – V3.0

- LSP (Alma) purchased – February 2014
- Implementation – March-December, 2014
- Go live – January 6, 2015

Announced that old ILS-OPAC was going away....
Discovery System: Implementation – V3.0

DUET CHARTER

Discover/Access User Experience Team

Purpose

The Discover/Access User Experience Team will help identify changes or configuration modifications needed for the OU Libraries’ Discover tool and WorldCat so that the move away from a public facing catalog will transition as smoothly as possible. The team will do this by conducting usability studies on both the Discover tool and WorldCat to gain feedback from students, faculty, and staff from across campus. Based on this data, configuration recommendations will be made to best meet the needs of our users. The team will also help identify and create learning tools that will assist users in making this transition and create a broad communication plan to help disseminate information about the changes to the libraries’ access tools. An internal working group will be utilized and will be composed of library personnel and external key stakeholders on the OU campus.

Deliverables & Deadlines

<table>
<thead>
<tr>
<th>DELIVERABLES</th>
<th>DEADLINES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Usability assessment of Discover and WorldCat to identify configuration changes.</td>
<td>May 1, 2014</td>
</tr>
<tr>
<td>Presentation to public services personnel on changes to Discover based on Alma implementation (ILL, Reserves, catalog, etc.) and the use of WorldCat as an option.</td>
<td>May – June 2014</td>
</tr>
<tr>
<td>Based on the needs identified during usability assessment and internal demonstrations, create orientation guides and how-to tools for users.</td>
<td>June 30, 2014</td>
</tr>
<tr>
<td>Create communication pieces for the OU community about changes and new system.</td>
<td>August 1, 2014</td>
</tr>
<tr>
<td>Perform a usability assessment post-Alma implementation to determine results.</td>
<td>August 2014</td>
</tr>
</tbody>
</table>
2. When using the libraries' website to perform research, where is the first place you start and why?
Discovery System: Implementation – V3.0

Usability Studies: Task-oriented observation
Discovery System: Implementation – V3.0

Developing Discover Local

Known Item Search

- Any
- in the title
- as author/creator
- in subject

- Publication Date:
- Material Type:
- Language:
- Start Date:
- End Date:
- Search Scope:

Any year
All items
Any language
Day
Day
Library Catalog
Discovery System: Implementation – V3.0
Discovery System: Implementation – V3.0

in the title: Eat Pray Love
Material Type: Books
Publication Date: Any year
Language: Any language
Start Date: Day
End Date: Day
Search Scope: Library Catalog

Show bX Hot Articles

1 Results for Library Catalog

1

Eat, pray, love: one woman's search for everything across Italy, India and Indonesia
Elizabeth Gilbert 1969- 2006
Available at Bizzell Memorial Library Stacks (G 154.5 .G55 A3 2006 )

Book
Get It
Details
Virtual Browse
Discovery System: Implementation – V3.0

DISCOVER

- Broad Topic Searches
- Articles, Book Reviews, etc
- Option to search outside holdings

DISCOVER LOCAL

- Known Item Searches
- Books, Journals, etc.
- Items owned by OU Libraries
Discovery System: Implementation – V3.0
Discovery System: Implementation – V3.0
Discovery System: Implementation – V3.0
Discovery System: Implementation – V4.0
Discovery System: Implementation – V4.0

Libraries One Search

Discover
Main Site
Other sites (Galileo)
LibGuides
Features

• **Bento Result:** To help with result clutter we suggest a bento box to organize results. Separating Books, Articles, Databases, Website

• **Help:** Integrated resources for getting help with search results.

• **See All:** To keep from results getting too long, we limit results to 5 with a SEE ALL link at top of box.
Discovery System: Implementation – V4.0
Discovery System: Implementation – V??
Discovery System: Implementation – V??

A Knowledge Creation Platform; What is it?
Knowledge Creation Platforms

If you want to know more, see this issue of this Open Access journal: 027.7

At this URL, you’ll find a copy of this published article on the subject:

Discovery System: Implementation – V??
Discovery System: Implementation – V??

Making use of visible knowledge networks

An Idea Is a Network
Discovery System: Implementation – V??

- Cognitive Network
  - visualization
  - datasource
  - algorithm
  - developer
  - user

The UNIVERSITY of OKLAHOMA
libraries.ou.edu

Published by TopSCHOLAR®, 2016
Discovery System: Implementation – V??

“These technologies will change the nature of search from people seeking out the information they need to the information seeking them out when they need it, without having to think much about it in advance.”

Steven Bell, Associate University Librarian for Research and Instructional Services, Temple University Libraries
Let’s face it….

We’ve been at this for awhile (since 2600 BC by most estimates).

And as a result….
Why did we need a Library Service Platform?

We’ve built a LOT of silos of knowledge and workflows

http://www.flickr.com/photos/paulstarr/
Why did we need a Library Service Platform? ILS of the past

Resulting in (to name just a few) -

a. Cumbersome workarounds
b. Inflexibility
c. Duplicate data and efforts
d. Duplicate workflows

Vendor Support (too thin because…)

a. Repetitive Upgrades
b. Aging hardware at customer sites
c. Costly training
Why did we need a Library Service Platform?

ILS of the past

“We are interpreting a global world with a system built for local landscapes.”
Why did we need a Library Service Platform?

ILS of the past...
Why did we need a Library Service Platform?

• Key advantages of an LSP over an ILS:
  – Rapid elasticity.
  – Measured service.
  – Multi-tenancy.
  – Rewritten from ground up to optimize new workflows.
  – Greater global collaboration/cooperation possibilities.
  – Analytics, both local and global, with possibility for transactional.
  – Frees your IT people up to do higher value work for end-users (won’t need to hire as many people in the future)
  – No need to:
    • Buying/Scheduling/Upgrading hardware
    • Waiting for or performing software upgrades
    • Worrying about disaster recovery
Why did we need a Library Service Platform?

**Multi-tenancy** (per Wikipedia): refers to a software architecture in which a single of a software instance runs on a server and serves multiple tenants… it contrasts with multi-instance architectures, where separate software instances operate on behalf of different tenants.
Why did we need a Library Service Platform?

Why does multi-tenancy matter?

• Make software updates once, NOT to each instance of the software
• Rapid updates (vendor does it for you)
• On-demand provisioning / rapid elasticity
• Measured service (buy what you need)
Why did we need a Library Service Platform?

Why does multi-tenancy matter? – cont’d

- Security (better)
- Costs (more efficient)
- Reporting/analytic data (power of data comes from quantity of data)
Why did we need a Library Service Platform?

Data as a Service means..

Build once, used by many
Why did we need a Library Service Platform?

Focus on the **Unique** ...
(the institutional)

... and integrate the **Common**
(global information)
Why did we need a Library Service Platform?

Ownership → Access

Selection → Fulfillment

Just-in-case → Just-in-time

Cataloging → Description
Why is a Library Service Platform so important?

As LSP’s gain momentum:
• Data stores grow and become more valuable.
• Will enable deep analysis and forecasting.
• Transactional analytics

Quality of library service will divide into:
• Very high-performance
• Everybody else
Why is a Library Service Platform so important?

Using Library Service Platforms, libraries will go from being reactive and generic service organizations to proactive and highly personalized service organizations.
Our choice in a Library Service Platform?

Alma

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LIBRARIES
libraries.ou.edu
Justifying a Library Service Platform?

• It is **NOT** about saving money
• It **IS** about being more efficient & effective with the money you have.
  • Repurposing staff positions
  • Offering new services
  • Refocusing existing services/collections
  • Advancing organizational objectives, both:
    • University
    • Libraries
Implementing a Library Service Platform?
Implementing a Library Service Platform?
Implementing a Library Service Platform?  
The Charter  

Scope:  

The LSP Implementation Team will work with all library departments to identify the best practices to be adopted in redesigning our workflows. The team will help:

• coordinate the departmental teams conducting this work;
• keep the organization focused on the agreed-upon goals and deliverables;
• work with the new LSP system to implement the workflows;
• provide forums for the identifying and addressing inter-departmental issues that arise during the implementation; and
• identify metrics to be measured to assess the quality and throughput of these new workflows.
Implementing a Library Service Platform?
The Charter

Deliverables:

• Bi-weekly meetings, with pre-issued agendas and minutes after each meeting.
• Suggested and documented new workflows.
• Coordinate training in conjunction with Training Steering Committee
• A report identifying areas examined, improvements desired, metrics to be measured and identified, and expected problems that were encountered.
• A monthly status report issued to the Chief Technology Officer.
• A Trello project plan for managing this process/project.
Implementing a Library Service Platform?
The Charter

<table>
<thead>
<tr>
<th>Library Service Platform implementation</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan</td>
<td>Feb</td>
</tr>
<tr>
<td>S = Task started</td>
<td>&gt; = Task continues</td>
</tr>
<tr>
<td>Workflow Analysis/restructuring</td>
<td>S</td>
</tr>
<tr>
<td>Implementing LSP</td>
<td>S</td>
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<tr>
<td>LSP Beta - Internal</td>
<td></td>
</tr>
<tr>
<td>Fine tune LSP Implementation</td>
<td></td>
</tr>
</tbody>
</table>

Actual Go-Live date?  January 2015
Implementing a Library Service Platform?

• Chart ALL workflows
  • Ideal
  • Current
  • Alma
Implementing a Library Service Platform?

Training

• After workflow charting, we utilized Ex Libris video training courses for team training
• Before “Go-Live” all public facing team members were tested to ensure understanding
• 6-months after “Go-Live” all team members took all the video training again
A Library Service Platform?
What about OLE?

• Read: http://thoughts.care-affiliates.com/2016/04/the-ole-merry-go-round-spins-on.html
• OLE code base is dead. They’re starting over.
• Microservices?
• Governance?
• Target market?
• Multi-tenant?
• 2018? 😊
Agenda

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Radically Collaborate!

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Advancing From Kumbaya to Radical Collaboration: Redefining the Future Research Library

JAMES G. NEAL
Columbia University, New York, NY, USA
Radically Collaborate!

“Radical collaboration encourages academic libraries to move in four new directions:
1. Mass production (back-room operations)
2. Centers of excellence (specialized expertise or services)
3. New infrastructure (digital ingestion, processing, archiving)
4. New initiatives, new programs/project
In all four cases, the measures of success must be quality, productivity and innovation.”

James G. Neal
Radically Collaborate!

• How we has OU “radically collaborated”?
  – Repository (jointly done with OSU/OU
  – Galileo’s World (Partners across country/globe)
  – Innovation @ the Edge (Virtual reality / scaling)
  – Innovation Hub (Partners across campus)
  – Alma(LSP)/Primo(Discovery) - (Implementations)
  – Vendors (Exaptive, ProQuest/Ex Libris, others...)
  – CLIR – Postdoc position creation

• Planned?
  – Preservation/Archiving
  – Metadata
  – Research data services
Agenda

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Conclusion

Remember!

a. Have a plan, i.e. know where you’re headed
b. Think BIGGER
c. Radically Collaborate

And, finally.....
Future – Where are we headed?

The 21st Century Library will:

• See the community as part of their “collection”

• Provide them with seamless tools to provide services and facilitate knowledge creation.

• Build cognitive (not social) networks of people in their community.

• Use technology to pave ways for information to automatically find the users (analytics, Knowledge Creation Platforms and more) not the other way around.

• Be able to clearly document and show value.
Conclusion

“Go as far as you can see; when you get there, you'll be able to see farther.”

J. P. Morgan
http://www.brainyquote.com/quotes/quotes/j/jpmorgan158098.html
“If you want to go fast, go alone. If you want to go far, go together.”

*Afican Proverb*
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