



Librarian Futures

Interviews with

- **Matthew Hayes, Lean Library**
- **Martha Sedgwick, Technology from SAGE**

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KENNEALLY: Been to the library lately? Not much? Well, maybe you haven't been going because of COVID-19 pandemic restrictions. And maybe, too, you think you can do all your research online, starting at a search engine portal.

Welcome to Copyright Clearance Center's podcast series. I'm Christopher Kenneally, for Velocity of Content.

Librarians miss you, and they want you back. That's just one finding of an unprecedented survey of 4,000 librarians and patrons. It turns out library patrons also really appreciate librarians, yet a significant knowledge gap lies between them.

Librarian Futures, a white paper based on the survey, was published by SAGE in early November. Andrew Barker, library services director at Lancaster University in the UK, told *Research Information* that the report underlines why libraries "need to be seen not simply as a repository of silent students and print books, but actually at the forefront of a user's university experience, both digital and physical."

Matthew Hayes, Lean Library managing director, is co-author of *Librarian Futures*. Lean Library was founded in 2016 to develop software solutions that support researcher accessibility and improve remote user experience. In 2018, SAGE Publishing acquired the startup. Matthew Hayes holds a PhD from University College London Institute of Education. He joins me from his office in London. Welcome to the program, Matt.

HAYES: Thank you so much for having me.

KENNEALLY: We're looking forward to discussing *Librarian Futures*. In the report, you quote Lorcan Dempsey, the widely regarded library strategist with OCLC, who said that, "the forced migration online brought on by the pandemic may mark a final transition into a more fully digital identity for the library."



Librarian Futures sought to explore what this digital identity might look like, positioning the librarian at the center of your analysis. At the same time, though, you describe your mission as working to embed the library in the life of the user. So I wonder, is there a tug of war going on here, Matt? Who's pulling whom into the future?

HAYES: That's a fantastic question, actually. I would say that what came out of a lot of our survey responses and when we viewed some of the anonymous comments from patrons, from both undergraduates and faculty, is that we mentioned how much they appreciate their librarian, but undergraduates in particular said that we are investing a lot in our university experience, and we have come to Harvard, Cambridge, Stanford because of its resources and because of its expertise. So they recognize that the librarian is one of those pillars of expertise that they should be able to rely on and they should get the most out of, and I don't think that's necessarily contradictory to them nonetheless seeming to prefer workflows outside the library, like Google Scholar and Google and Wikipedia and so on, just in terms of convenience and because they just use them in their ordinary lives.

So I think you can reconcile the two, because you can say that by ensuring the library and the librarian is more relevant and is adapted into this new digital era, although patrons have not been using the library as much as they did in the past, there can be a sea change if the library can be delivered in ways that they are now used to in their workflow, as opposed to being something they need to go to and to visit themselves. The library actually can come to them.

KENNEALLY: The survey you conducted makes clear the extent to which discovery workflow now does begin outside the library, almost every time. 79% of faculty, 74% of students embark on research outside the library. And it won't surprise anybody that student patrons consult Wikipedia as often as they do a librarian. So what will it take for researchers and students to return to the library, Matt? Can librarians embed themselves successfully in patron workflows outside the library?

HAYES: Absolutely. I think so. I think that it'll take convenience, and it'll take a different user experience. Also, I think that we are headed for a little bit of a realization that we are in this era of massive information surfeit and disinformation, so actually, the kind of curation role of a library and a librarian is more important than ever before.

We've kind of been in this honeymoon period of look at the amazing information I can have at my fingertips on Google and Wikipedia and these open-source tools, I think there's a realization that actually you need a bit of a breaker there, and you need curation and you need quality control and you need guidance.



There's a term, "guided discovery," that is increasingly popular at the moment. I think patrons are going to need that much more. So I think that's how the library, in addition to being more convenient and more user-centered, can be more relevant – not just as relevant as the past, but be even more relevant.

KENNEALLY: The survey revealed that library patrons often don't know the full reach of librarian support that is available to them. And at the same time, librarians also seem to have differences in their views of activities. They prioritize some activities that may not actually be serving the needs of patrons. So what do you make of this ongoing knowledge gap between the librarians and the patrons?

HAYES: It's a knowledge gap that many librarians recognize themselves, and it's a disconnect that they know is already there. And it exists with good reason. I think it's about a legacy infrastructure – sort of legacy procurement infrastructure or whatever you might call it – which basically solidifies the importance of the collection above all else in terms of what the library does. We had some great interview comments from librarians talking about wanting to go beyond just being seen as measured by the size of their collection and wanting instead to be seen by the impact they deliver to research discovery and learning outcomes. Once you look at it that way, it's very different.

I think the other dynamic is that perhaps because patrons aren't coming to the physical library as often as they have been and also aren't coming to the digital platform of the library as often, because they're, as you say, starting on Google and outside the library, that connection with the patron is a little looser than it was in the past. So there's less familiarity with the end user and what they're doing at the moment, what their preferences are.

For example, we found that patrons would overwhelmingly prefer to receive information from their library about particular library support services or other support at the point of need as opposed to via e-mail updates or one-to-one meetings.

KENNEALLY: Looking ahead, the report moves from librarian/patron engagement today to peer into the future of these interactions. So tell me about some of the "innovation provocations" that you propose.

HAYES: We use that term innovation provocation, which I hope doesn't sound too grand, but we wanted to use that, first of all, to be totally transparent that Lean Library, in publishing this report, is in a way publishing its research into what we should be doing with our product development.



So there's one overall provocation, which is if you could download or adopt a comprehensive digital application for your library that sits in your digital workflow, available for you to call upon anytime for relevant library services and resources and content, would you do so? We asked that to both librarians and patrons, and we got an overwhelmingly positive response. So 88% of patrons said they would, and 82% of librarians said they would. And interestingly, I wonder sometimes in these results whether librarians are a little bit more cautious because they anticipate that patrons are going to be less comfortable with the idea of the librarian in their workflow, whereas actually, patrons appear to be more comfortable with that.

And then in terms of what exactly that application would deliver, we then tried to look at what we consider to be each of the key pillars of the library's service provision to its patrons. So we looked at discovery, support, curation, and engagement. For example, in support, we asked would you like to be able to speak directly with your librarian as you're working online? For example, if you're on Web of Science performing a search, or if you're doing some analysis in Power BI, would like the ability to be able to just speak directly with your librarian there and then? And again, that was overwhelmingly positive from both librarians and patrons.

KENNEALLY: And when it comes to university library patrons, there are many students, of course, working on their doctoral thesis, but there are also plenty of faculty who are involved in the library's work. 54% of faculty patrons in your survey said they consider publication, of course, essential to their success. No surprise there. But only 21% of those said promotion of this research was core to their activity. That's an opportunity for librarians, and they may want to offer some help.

HAYES: Absolutely. It's an opportunity for a part of the university to engage with, because we know that many universities assess themselves by their research impact, by the dissemination of the work of their researchers, by their citations, by their coverage, by the impact on policy. So you can understand why the university as a whole would want to support their researchers. And then it just becomes a question of, well, which department? I think that the library as a department is the best place to do that – has the infrastructure, has the expertise, has the resources to support that.

I think the other thing that's interesting is that rightly or wrongly, the researchers themselves clearly don't feel that it's their responsibility to help disseminate their work. I'm sure that that is by no means a majority of researchers, and you could also see from interviews with faculty some amazing work that researchers do to disseminate their work personally with social media and through innovative new ways of doing recordings of their articles or graphical abstracts or whatever it might be. But either way you cut it, I think librarians can support. Either it's by helping to guide researchers to do some of this work



themselves and to build their own profiles online to promote their work, or simply by helping guide them through the quite complex publication process that now exists today in terms of how you comply with open access mandates, which journal you should go for in your field, what your publication strategy should be – should you have one article or three, or should you publish an e-book? And I think also if the library could help amplify any of the dissemination work that researchers do, that would clearly also have a big impact.

That returns to Lorcan Dempsey's idea again of the inside-out collection, this idea that as the library moves away from the collection being the center of what it does and also supports open access agreements and the publication of its researchers in open access channels, there may be new ways of curation, and that curation is not about what it's bringing into the library, but it's about what it's pushing out. So maybe it's not just about disseminating individual articles. It could be also about how you pool together the research of a particular institution and make it easily searchable or make all the data behind that research available, make it navigable by topic, collaborate with other aggregators and other abstracting services and indexes to really build a knowledge graph and a knowledge base around your institution's research. I think it's a fascinating area for libraries.

KENNEALLY: Indeed. And I can certainly understand why, Matt Hayes, you and Lean Library think of library transformation as an opportunity. But finally, I want to ask you whether you think librarians share that view. Is there a sense of optimism or trepidation? How would you characterize the mood?

HAYES: I think that was an interesting finding, actually, for us. We asked three questions, I suppose. We asked what sort of levels of optimism did librarians have in the short term and in the medium term, and then also, how would they describe the librarian in 2030 – so all different ways of looking at how librarians perceive the future. I had anticipated a quite negative view in the short term, because we know from the librarians we work with that it's been an incredibly challenging period. They've all been working overtime to set up click-and-collect services and rapidly digitize content and try to negotiate e-textbooks and all manner of things. So we understand it's a stressful period of time – and budgetary constraints and challenges around enrollment and so forth.

But actually, in the short term, librarians were primarily optimistic, and in the medium term, also optimistic. So I think that speaks to a good deal of resilience amongst the librarian community. And I think that resilience, combined with the appreciation that you kindly mentioned at the outset that patrons feel for their librarians, suggests to me that there's a really fertile ground for innovation, because innovation inevitably carries risk, and innovations you implement aren't always going to go according to plan. There are going to be stumbling blocks and so on. But to have a community that's incredibly optimistic and resilient and a user base that has this sort of groundswell of good will suggests that both



librarians can innovate and that patrons will be comfortable with them doing so and with the teething problems that come as a result of that.

KENNEALLY: Matt Hayes, Lean Library managing director and coauthor of *Librarian Futures*, thanks for speaking with me.

HAYES: Thank you so much for having me. Thank you.

KENNEALLY: Lean Library is one of three companies that make up a newly launched division of SAGE Publishing, a global academic publisher of books and journals, as well as a suite of library products and services. Martha Sedgwick is vice president, product innovation, for SAGE. She joins me now from London. Welcome to the program, Martha.

SEDGWICK: Hi, Chris. It's a pleasure to be here.

KENNEALLY: Well, we want to learn more about this new division, Technology from SAGE. I wonder if you can tell us how the decision to launch it reflects the ongoing pivot in publishing from content to solutions. Tell us about your goals. And how did a publisher come to create a technology division that you say is publisher-agnostic?

SEDGWICK: I think probably the way we describe it is less of a pivot and more of an extension of our mission and our business. We talk at SAGE about our mission being to build bridges to knowledge, that our purpose is about creating those connections between learners and researchers and teaching faculty and then research impact. And our publishing and our content strategy has been about how we've fulfilled that mission to this point. But it feels at this point, you can't see content without the technology around it. The technology is what enables the discovery, the access, the engagement around that content.

I've personally been involved in the development of many of our new digital products over the last decade at SAGE and become much closer to some of the real pain points that students and researchers experience as they go about doing research between different publisher platforms. And I'm really excited by this opportunity to be able to bring small businesses into SAGE to solve some of those big pain points. It can only be done if it's agnostic. This isn't about resolving this just for SAGE, but about making the lives of researchers and students easier through great tech that solves their pains.

So, Martha, tell us why SAGE chose to create the technology for SAGE under a portfolio structure.



SEDGWICK: We've taken this approach of bringing these businesses into SAGE but preserving a level of independence in them, their brands, their governance structure, the relationships they have with their customers. And I think we've done that because we can see that there are smart people doing smart things out there, and we don't want to dilute that.

Independence is in our DNA at SAGE. Our founder has put in her will that SAGE will be independent for centuries to come. So we want to pass on that level of independence into these businesses to sustain a sort of entrepreneurial verve in the way that they run, that they innovate, but with the backing of the larger company and with the investment that we can put into them.

KENNEALLY: What kind of problems for students and researchers are you trying to solve with Technology from SAGE?

SEDGWICK: One of the things that is distinctive about all of these solutions is that they are library solutions, that we see the library as fundamental to learning and research on campus, and through these businesses, through their services, we want to amplify that value and support and amplify that critical value that libraries bring to learning and research. And we're doing that not through services that support back-end, back-office functions at the library but that are focused on workflow solutions.

So whether that is Lean Library's access service that streamlines that remote access experience into content for researchers and saves minutes off every search query, or whether it's the Quartex service from Adam Mathew that allows libraries to digitize and open up discovery and access into their archival material, whether it's the Talis Aspire resource list reading list management service that allows students then to really quickly run down a list of recommended teaching resources and connect into the library holdings through one click, all of these are services that connect students and researchers into content that really amplify or really solve problems in that discovery, access, engagement space. They're all workflow tools and all designed to make learning and research easier, which I think is what great tech does for us all.

KENNEALLY: Indeed. Matt Hayes from Lean Library has told us about a knowledge gap that separates librarians and patrons. And that, of course, has widened as researchers and students work outside traditional library environments. So how are the various services from Lean Library, Talis, and Quartex attempting to close this gap, and do they complement each other?

SEDGWICK: Yeah, I think they really do. They're distinctive, different services. So we want to offer this ecosystem of choice where you don't have to buy them all. You choose what



works for you as a librarian and your institution. But they are fundamentally all about bringing the library closer into the student workflow.

And you would have just heard Matt talking, I think, about his exciting new, really pioneering product, Library Futures, which does that so effectively with their customers today.

KENNEALLY: Martha Sedgwick, you emphasized the independent nature of SAGE and the independence that these various companies will have within the portfolio that is Technology from SAGE. So you think of that independence, then, as an advantage, especially in a world of publishing in tech giants?

SEDGWICK: Yeah, I do. I think it's something that's distinctive, that's different. I think it's something that allows us to support the little guy, the smaller players, and really invest in pioneering innovation in this space and new tech solving smart problems and in teams that are small, nimble, and can continue to sort of evolve and grow.

KENNEALLY: Martha Sedgwick, vice president, product innovation, for SAGE, thanks so much for joining me on the program today.

SEDGWICK: Thanks, Chris. It's been a real pleasure.

KENNEALLY: Our co-producer and recording engineer is Jeremy Brieske of Burst Marketing. You can subscribe to the program wherever you go for podcasts, and please do follow us on Twitter and Facebook. I'm Christopher Kenneally. Thanks for joining us, and we hope to see you again soon on another podcast from CCC.

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