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Charleston Library Conference

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## Do Not Be an Invisible Library!

Rick Burke

*Statewide California Electronic Library Consortium (SCELC)*, [rburke@scelc.org](mailto:rburke@scelc.org)

Matt Goldner

*Online Computer Library Center, Inc. (OCLC)*, [goldnerm@oclc.org](mailto:goldnerm@oclc.org)

Glenn Johnson-Grau

*Loyola Marymount University*, [gjohnson@lmu.edu](mailto:gjohnson@lmu.edu)

Franny Lee

*SIPX, Inc.*, [franny@sipx.com](mailto:franny@sipx.com)

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## Do Not Be an Invisible Library!

*Rick Burke, Executive Director, Statewide California Electronic Library Consortium (SCELC)*

*Matt Goldner, Product and Technology Advocate, Online Computer Library Center, Inc. (OCLC)*

*Glenn Johnson-Grau, Head of Collection Development, Loyola Marymount University*

*Franny Lee, Vice President, University Relations/Product Development and Co-founder, SIPX, Inc.*

*The following is a transcription of a live presentation at the 2013 Charleston Conference. Slides and video are available online at <http://bit.ly/1gyJ3Hn>.*

**Rick Burke:** I am Rick Burke, and I am the Executive Director of SCELC, which is a consortium in California, with libraries inside and outside of California. What we are going to talk about this morning is, "Do Not Be an Invisible Library." I will explain very briefly some background as to why we wanted to do this. This came out of a conversation that Franny Lee and I had, and I want to introduce Franny in a minute, about how can we get our libraries in front of our users more effectively and make them recognize the value of what the library is doing. And I will tell you a little story to illustrate why this is a problem. I randomly met a professor, a very high level physicist at a major research university. This university is one of the member institutions of SCELC, and this man was brilliant, it was very clear. He was hanging out in a coffee house in Pasadena, and I just happened to be introduced to him. We were talking about his university and his research, and he asked what I did, and I said "Well, I run a library consortium," and I explained what a library consortium is. Then I said "So do you use your library?" He says "Oh, no, I do not need the library anymore. I used to, in the old days, I would go and look at back issue journals. But now I do not need to because it is all online." And I said "Well, you realize that it is the library that is paying for all that, and the reason that it is online is because the library is providing it?" He just kind of gave me a blank look, and I thought, well, even at our research universities the library's value is not recognized by their faculty. But it shows you how difficult it is to truly engage with your faculty at a level where they all understand the role of the library. We are all used to talking until we are blue in the face about electronic resources for years here, and we sort of assume that everybody else understands that that is the

case, but it is not. So that led me to SIPX, which is what Franny will be talking about.

But first, let me mention that there is an opposite example, and that is what Glenn Johnson-Grau, who is the Head of Collection Development at Loyola Marymount University in Los Angeles, one of our most active members, will be talking about; how they put their library very much in front of their users and how successful they are at that. Franny Lee is the VP of Business Development at SIPX. When I met Franny a year ago after Charleston, I discovered what SIPX was, and a light bulb went off in my head because it is a tool that would really help libraries in terms of taking your resources and getting it in front of the end user, while letting the end user know, "Hey, the reason that you were able to use this is because the library paid for it, and the library is providing this as a service." And then third is, in the order in which they will be speaking, Matt Goldner, who is the Product and Technology Advocate at OCLC. In the context of SCELC, OCLC is an important partner because they help us engage our libraries at the group level. We have a couple of projects that we do with OCLC, among which is a patron-initiated borrowing network called Camino that uses OCLC Navigator software. We also have a digital library project that uses ContentDM software, where we have purchased a group license that we resell at an incredibly cheap price to our library so they can start building digital collections. So OCLC also plays an important role in terms of providing services that then become valuable to the end user, and the end user starts to realize, "Gee, my library is really not invisible." So without further ado, I am going to let them take over and speak, and then we will take questions at the end.

**Glenn Johnson-Grau:** Hi, everybody. I am Glenn Johnson-Grau. I am the Head of Collection Development at Loyola Marymount University. I

am a collections person, but I am primarily going to be talking about other things that the library has done. We have been very successful at making our library prominent on our campus as well as with other institutions and organizations. We are a midsize academic institution with about 6,200 FTE undergrads and about 2,200 graduate students. We are located in West Los Angeles. We are very lucky; we did build a new library and opened it in 2009, so if you want to not be invisible that is one way to help yourself in that cause. But we did some things specifically trying to leverage our new library to take advantage of this new prominence on our campus.

Partnership: I think you are going to hear this a lot by all of the presenters. We realize that our theme for today is working on building relationships with our partners. On our campus, we spend a lot of time working to develop relationships with our faculty and our administration and groups on campus. Whereas the mindset of focusing on partnership is the beginning point, we found that there is something that we use as a kind of a peg on which we can hang programs, which are exhibits. We have done a number of things related to exhibits of all different kinds, and I will give you some examples of that; they become the focus around which we are able to do a lot of our programming.

So here is an example. We did this exhibit earlier at the beginning of the year. It was an ALA-sponsored traveling exhibit celebrating the 400th anniversary of the King James Version of the Bible. While that is not a natural connection for a Catholic institution to be showing the first prominent Protestant Bible, we knew that we could have partnerships on our campus that would work with us on this topic, and we were right, as it was quite successful. So we involved our Theological Studies department, English department, African American studies, campus ministry, a lot of different programs on our campus. When we went to them and said, "We are bringing this exhibit. Do you want to do something with us?" they were really excited about it. One of the nice connections that developed out of this was the Director of our Honors Program, whom we had a very strong

relationship with related to library resources and the Honors students, came to us and said that he wanted to see some kind of connection between the African American community and the African American experience and the King James Bible, and that led to one of the programs that was really exciting, and well attended, and was considered a high point of the whole exhibit. He introduced us to the director of the gospel choir on our campus who then led a performance from her church, which was a large church with a big gospel group. They came and did a presentation and performance. They performed songs and then the choir director explicated how the language of the King James Bible found its way into gospel music. So this was an event that was not held in the library, and would not from outward appearance have anything to do with the library, but it would not have happened if we had not brought the exhibit to our campus to get the whole thing started.

One of the things that we have found is that partnerships beget other partnerships. When we go looking for a partnership now related to an exhibit, like an exhibit we are trying to get related to the Dust Bowl, we have potential partners coming to us. And this is a totally different group of people, different academic departments, so it is not the same group of people, but they are excited because they knew the past event was a success, and they realize that they can hang their programming and their events related to it on a totally different type of exhibit. So we really work on trying to get the word out on how these successful partnerships will allow us to do additional campus events and programming.

We have very consciously tried to change the perception of what the library is, and how the library fits in on a campus, by focusing on things that we could do that were nontraditional library services, again, largely related to the fact that we had this new building that brought us new prominence and visibility. We want to build on the culture of collaboration that is very much a part of librarianship. That is our base. Librarians and libraries have a kind of warm and fuzzy relationship with people. People have good memories of us. People feel strongly positive

about us, but until we actually turn that into something, it is just nostalgia. So we worked very hard on trying to build upon that, to change the idea of what the library is from the collections in the building to larger intellectual engagement in the campus.

We also tried very hard to work with our student groups related to things that they want to do. Both for faculty and students, there is this idea of the library as this third place. The sociologist Ray Oldenburg talks about the third place as a place where events can happen outside the traditional boundaries of the workplace and home place, and when we were building our building we were thinking a lot about how to turn the library into a third place on campus both for our faculty and for students. Students need places to be able to do things. So we want to make sure that we are engaging with our student groups who do not have a campus home so they can be able to come in and use the library as their space. So the picture on your left (referring to slide) is a picture of our students on a tour, a senior tour, of the campus where they get to see hidden places on the campus. They really like to be able to see these places that were kind of off the map, including our stacks in the basement of the library, who would have thought, but they liked that. We use social media to be able to engage with our students not just as a way to present our programs, not just pushing out information, but really trying to engage them in conversation in the place where they are actually doing a lot of their own types of communication.

It is very important for us to be able to know what the climate of our campus is, so we work very hard on engagement with the institutional mission, working on annual academic planning, and strategic planning. We strongly encourage our librarians to be involved in campus governance. We are represented in the Faculty Senate, so we spend time being on the Senate and academic committees on campus. That is a really large part of our engagement.

The way that we got here was when we moved into the new building, our Dean made it very clear to us, she was new on the campus at the time, and she made it clear that she wanted the library

to be an intellectual and cultural hub of the campus. Since then, that is what we have been trying to do. Her leadership on this has been absolutely instrumental. The next step was engaging the librarians, having group discussions on what we can do to continue our engagement with campus and the things that we can individually do in our own library departments. And, of course, an important part of that is the funding aspect. One of the things that the Dean established in the new building was an outreach librarian. The outreach librarian is absolutely instrumental in all the things that we are talking about today so that was really an important step.

Additionally, we worked on making sure that in our promotion plans that people were recognized and rewarded for their engagement, so we have both incentives for presenting and for outreach and other activities. That is an important part of our promotion plans so that we make sure that we recognize the librarians for what they are doing. And that extends to our staff as well, trying to make sure that the nonlibrarian staff are also engaged in events on our campus because a lot of them have connections that we do not have. They may be alumni, and they may have other activities that they are engaged in on campus. This is one of our library staff members (referring to slide) who developed a program for service staff on computer literacy on campus, and it was a really, really big success and, again, was not something that would have been traditionally thought of as a library activity.

We certainly try to engage outside the library walls with our consortium partners, with SCEL, and with other outside organizations. We have developed lots of different programs that have been successful with SCEL. We have the SCEL Vendor Day event at the LMU campus so that, again, allows librarians from all over California to come visit our campus to see what SCEL has to offer.

And lastly I want to focus on one particular program that has been a really big success. We have engaged in a core curriculum development process at LMU for a new core and, again, made possible because we have participated in so much of the campus governance. We have an

embedded component from the library, an information literacy component, in all the levels of the new core curriculum so our students are being engaged in information literacy as 10% of their grade in their first semester and their second semester as well as in their upper division courses. A lot of that is built upon participating in campus governance, being at the table when these things are discussed. It has been absolutely instrumental in transforming our information literacy program, and it builds on all of the other engagement we have been involved in. So what we have found is that we need to be strategic in choosing our potential partnerships and building upon those. We are always persistent and always at the table when these discussions happen because that is the only way to remain relevant. We have found it is very easy for people to forget and just put the library off to the side, so really those issues of partnership and engagement have really gotten us to where we are. That is what I have. Over to Franny.

**Franny Lee:** Thanks, Glenn. I have got a few things that I wanted to touch on today that revolve around technology and can probably categorize them into two main messages. First, I wanted to share the story of the birth of SIPX because I think it is important in understanding how the library was a big part of our creation. SIPX was a research project at Stanford that involved very deep input and feedback from the Stanford Library, having them guide us in understanding their pain points, and using that insight to enhance our development and make us a more useful tool. Second, I also want to dive a little bit deeper into what the visibility libraries can achieve through the tools that they bring into their campus. Libraries are more than being just about content access or just about collections management. There is a lot of opportunity to showcase the value of the library in front of users, as well as data that runs through these systems that can be drawn together to put the library in more leadership conversations on policy development, curriculum development, and course development.

We are a pretty new company so some people may not be familiar with what SIPX is. SIPX is a technology service that brings a simple, end-to-end

solution to the challenges and copyright complexities of course materials in higher education. It gives instructors and librarians the opportunity, from their native LMS environment or reserves platforms, to select and prepare course readings in real time from a comprehensive collection of sources that includes library-licensed material, open access or public content, or nonsubscribed copyrighted materials. The system creates flexible links to deliver these readings, that easily embed back into many different teaching and learning contexts, allowing students to take advantage of unbundled options and ensuring that the student or school pays the lowest possible (or no) cost. We are a scalable technology that is capable of supporting a wide range of use cases from single campus courses to complex MOOCs that span 50,000 students, 150 countries, dozens of school affiliations, and contextually or geographically based content prices—and can feed back that granular level of valuable analytics.

Getting back to the story of SIPX's birth, when we first started at Stanford, we were a research group. We were half computer science department, and I was part of the law faculty other half. I was a copyright lawyer by background, and a researcher at Stanford. Additionally, our group consisted of professors, teaching faculty, and students who all felt firsthand the constraints of what we called the "copyright maze" in the academic environment—trying to figure out how to get access to content we needed, not knowing about costs or processes involved, not knowing to what extent we could share materials. One of the first and biggest inefficiencies we noticed was in course materials settings, the bookstore did not understand what the library already subscribed to. Necessary data was in a silo and not connected where it was needed, resulting in students paying again at the bookstore for materials where the library already bought subscriptions. To explore this problem, we approached the library early, and they were eager to work together. I think it was an area that is a huge pain point for them. They worked with us by showing us their workflows. They worked with us by introducing us to their existing technological tools and infrastructures. They worked with us by giving us insights on their subscription relationships. Being fortunate enough to be half

Computer Science in our research group, we also built a database-driven prototype system to automate as many of the manual, time- and cost-prohibitive components as possible—and the library again was very hands on with providing feedback. We would meet with them regularly to show our progress, and share the results of the pilot courses that were running through our system, and they would contribute suggestions on everything from user interface to workflows: “Could we put a logo here for the Stanford University Libraries, to show the student their price is \$0 because the library bought a subscription? It could be part of copyright education for an instructor to understand that the public list price of that article is \$X when they select materials.” So it was SIPX’s early engagement with the library that helped us pinpoint and solve real pain points in a very large and diffused ecosystem. We learned a lot from working with the library to help us create a clean, streamlined design that was useful and existed comfortably within the actual workflows of professors and students and communicates the information that libraries need to send forward and that students and professors need to receive. I think it also gave the library an opportunity to show that it was important to surface their visibility in front of teachers and students, too.

It might be useful to show you what the interface looks like today and how we have preserved this visibility in the commercial SIPX system. This is an example of SIPX reading links embedded inside of the Sakai Learning Management System course site at Stanford. The students click on the link to get the readings they need for class that week, as they usually do, and will see a message come up to deliver their reading. This helps support copyright education that libraries can push forward to the community—the students see their price is zero but the public list price of this reading is 2 or 3 dollars, and have a better understanding that content costs money sometimes. They also see why their price is zero—it was covered by the school because the library bought the subscription, which is where Stanford Library asked to insert a logo also.

We have also learned a lot since spinning SIPX out of the university. Part of SIPX’s goals are to connect

components together. Every school is a little different. Every platform combination at every school is different. There are a ton of tools being used, but at the end of the day, we are all here trying to create a more efficient educational experience, and students are all accustomed to seamless Amazon/Google types of experience now. They do not want to hop from platform to platform to platform. So how we can work closer together with our schools and libraries to connect those pieces together and have them understand that the library is part of this effort?

Additionally, part of SIPX’s goals are to make sure people can do new things. More and more, education is no longer confined within a single campus’ borders. Because SIPX reading links are flexible, we see educators using them in all sorts of teaching contexts because it allows them to easily push materials out to students in a copyright-compliant and cost-reducing way—we have seen use of SIPX reading links in e-mails, course wikis, course reserves, LMS, online learning environments, MOOCs, even self-publishing of course notes in our last Coursera course.

I am touching on MOOCs in particular as it is a highly complex use case that features the full power of the kinds of analytics SIPX can provide—which helps me change gears now to talk about usage data and what libraries can do with this kind of data in order to create more benefits, more value, and more visibility to engage in more policy development conversations within their community. It is not news that understanding usage can be much broader than just looking at the database usage of subscribed content. Some of the things that SIPX adds is also that there is a next step in this picture: understanding what your actual students and professors are requesting on campus beyond subscribed content usage brings obvious benefits to the library and school, too. Clearly, collections development becomes much cleaner and much smarter when you have data driven analysis of what subscribed and nonsubscribed content is being used by your campus. Additionally, SIPX’s analytics can also tell professors what readings the students really engaged with, and what readings were not touched, or when they were most accessed during a course. As a library,

you could be in a position to gather content usage statistics from content vendor platforms, and potentially combine them with course completion statistics from another platform (whether it be the LMS or registrar systems), and you are in a place where you help can draw puzzle pieces together to identify student success factors. It gives the library more relevance in conversations with people who create and teach courses, or in the case of online education, with policymakers who think about the assets being created and how best to reapply those assets. A little bit of this is future, speculative looking, but schools do have the opportunity with today's technology to have a much better picture, based on data, about what they can do with all of this money that is being spent on educational innovation, MOOCs and online learning. And libraries have an opportunity to bring in tools and data to help drive those conversations.

I do not want to take up my cospeaker's time. To sum up, there are a lot of common themes that you will hear from all three of our presentations today, including be proactive. Being proactive can include using technology to make your library visible and relevant. Do not be afraid to experiment and jump into pilots to try new things. Give specific feedback and requests to your vendors on their tools and tell them about new needs you see coming on the horizon. Use your data and get involved in these new conversations at your schools. So I will leave it here and pass the baton over to Matt.

**Matt Goldner:** I am going to try to pull some things together and talk about what I have dubbed the 3 R's: the changing role, changing relationship, and changing requirements for librarians and then touch briefly on some of the things that the OCLC cooperative is doing to partner with member libraries and other libraries as we move forward into this new world that we live in.

This picture of the stately library is how I remember the library from when I was in university: this very warm place you went, the solitude, it was just that you loved going there. That was for me, and I spent many, many, many hours in the library because we did not have any type of electronic resources when I was in school. It was this place where we sat in solitude, and many of our libraries looked like this. They might not have been this grand, but it was

where we sat in solitude and we studied. So as I was thinking about the changing role in the library, there are really two things of the many things that I could have brought up. The first is, somewhat obviously, the changing place, the library as a place, and then the second thing would be the change in the library as repository. Because that is why we went to the library: it had this incredible monopoly on information and knowledge, and so that is why we had to go there. But in this picture, we see that what has happened is in the library as place, this happens to be the University of Alabama at Birmingham which I happened to have visited not long after they had reopened after redoing everything, and I thought "Wow!" It certainly was not the way my library was when I was in school, and so it has changed so dramatically due to the need for these collaborative spaces. Instead of these long, long rows of reading tables with everyone sitting all by themselves doing their thing, you have these collaborative spaces where students want to come and work together. Then, of course, the computer spaces: I was in the Addlestone Library yesterday for one of the sessions, how many of you have been down there to that library for a session? When you walk into that first floor it was astounding the number of workstations they had there! I was just amazed by that many. But that is what the library has moved to. And, of course, we have to have our Starbucks, because if we do not have our Starbucks, no one would ever come to the library. But the fact is that we have changed our place, and it is a collaborative space now. It is no longer this solitude space for individual research, and it is no longer a physical repository that you have to come to. Rather, we are information providers, which means that our relationship with our users is changing dramatically because our user is "out there," wherever they happen to be, we all know this. This is not news to any of you, and I am not likely to say anything shocking, but rather to set some context to remind us of the environment that we live in and then be able to look at a little bit of what cooperatives are doing to help in that.

So this student is sitting here, and she has a question to ask, and she wants to know something. Well, the library has the information that she needs but, as we know all too well, that is not where she

starts because we are no longer the starting place. I really do not have to debate that point. There has been way too much research on it in the last 5 years that we all know we are not the starting place. So we do become invisible? Presto! We disappear out of the picture, or, at best, we are just one among many options for that student where they want to go and find their information. Our relationship has dramatically changed with that student and how we are going to have to engage them. When we think about what are the requirements for change for us? Yes, we know that now we have to prove our value. We have to show that we are contributing to student retention, student graduation, for research institutions, attracting funding. We know that we have to continue to change our place, and it has just been amazing to watch that over the last 10 years. I am fortunate that I get to visit many libraries around the world, actually, and to see how they are changing in their place, and we are making this move from just-in-case to just-in-time. All of these things we are having to do, but central to it for me, and it has been a lot of what my life's work has been about for the last probably 12 years, is really understanding our users and figuring out how we get where our users are. Because if we are not their starting point, how do we interject ourselves into their workflow, into their way of seeking information and knowledge knowing that they are not likely to come to us as their first choice? Traditionally, we had this role of selecting, acquiring, describing, preserving, but now, increasingly, our role is about exposing our collections, our resources to the user because they are not coming to us. We have got to find ways to go to them if we are going to be successful in engaging them, and that is why I think both of the talks prior to mine were so interesting on how we are doing that, how we are using both innovative ideas and also technology to make these things happen, and it really is both, is it not? We all know technology in and of itself is not the answer, but when we start combining these things with creative people and ideas that is when it happens.

Just quickly, how is OCLC working with member libraries and really beyond member libraries? Of the many things I could mention here, there are only three that I am going to touch on because they

are somewhat relevant to the points of changing place, relationship, and the requirements we face in that. One of the things that we are doing is helping libraries figure out how they are going to manage down their print collections because this is something that has become a requirement. If I am going to replace half of my stacks with computers and another third of them with lounge chairs, I have got to do something with that physical collection. Next, how we are working with libraries to understand our constituencies and, finally, how to be libraries that are not on the web but libraries that are of the web. OCLC is a key player in that space and are recognized as that.

The first thing when I talk about managing down, this is just one example of many things that we have done. Have any of you read the Mega-Regions Report? It is quite interesting. If you have not, I think it is worth the read. It is three of our research scientists; one of the really cool things about working at OCLC is as a cooperative, we are able to engage some 20 research scientists on our staff, and this is what they are doing on behalf of libraries every day of their lives, and so they did a couple studies. First, they did the Cloud-Sourcing Report, and then they just did the Mega-Regions Report and looked at various models of how we are going to manage down our print collections and turn them into shared print collections, either physically or virtually. They did it quite interestingly based on economic mega-regions from other studies outside of librarianship. They looked at those mega-regions and the size of collections of mega-regions to start looking at how might a mega-region start thinking about how they would cooperatively manage what Lorcan Dempsey always calls the "collective collection" of the library. I am not going to talk about that report, I just wanted to use it as an example of many, many of the research papers that are being done and helping libraries think about where we are having to change our place and what it means to be a library as "place," how are we going to manage all this collections?

Of course, another area we do a huge amount of effort is in research of constituencies. This particular example happens to be librarian constituency, one of the top priorities, but you



should take advantage of the various reports because a huge amount of research and effort goes into these. These are not lightly created, and, again, it is that advantage that as a cooperative we can do these things as a whole membership group on behalf of libraries, and these things are not just interesting, they are very important.

The last thing is what I really wanted to focus on, because when we talk about being where our users are, I think we are gaining an understanding of our constituency. I think we are all getting the fact that they do not start with us. They have their own workflows in developing. It is fascinating, Andrew Pace, one of my colleagues, his 12-year-old son starts all of his school research on YouTube. That is where he starts his school research, you know, YouTube. And if there is not something on YouTube about pelicans, then there must not be anything written about pelicans, I guess. I do not know. But it is changing so dramatically. The role that a cooperative, any type of cooperative, can play is by libraries registering what they have cooperatively but then also working with other major content partners, then we are able to have a true aggregation of the collections of libraries. Whether they are physical, whether they are licensed or open access, or whether they are digital objects in repositories, we are able to aggregate all of that in a way that then becomes meaningful and useful for what we call syndication by putting that data back out for reuse by both library service partners, but also by consumer service partners. So what happens is then we are able, by using linked data then, to start using the linked data concepts. Mike Teets, our VP of the Innovation Lab, and I just recently published an article in *Future Internet* on the role of libraries in big data, and we started right out saying that library data is not big data because, sorry, it is not. It is not big data. However, it has a role to play in that world because of the fact that we have authoritative entities of linked data that can be reused, and so that is one of the things that, not just OCLC, but others are doing. That is what BIBFRAME is about. We are able to make that data

interesting. When we can take data from major content partners all over the world and aggregate that, and then when we can work with library service partners, whether they are other discovery services, whether they are other resource sharing interlibrary loan type systems. It was interesting when we came out with article exchange, which lets you just drop an article in the Dropbox-like application. Then the scanning companies came to us and said, "Hey, we want to just have it so the librarian can scan it and it goes straight to article exchange." And these other people helping libraries do research on collection development, collection management. With companies like Ex Libris just using our APIs and our data to help libraries know what they do not have that Ex Libris is offering, to help them do more streamlined collection development. These are the types of things when you have this massively aggregated data and services built upon it that we as a cooperative are able to do on behalf of the membership.

To me, one of the more exciting parts of it is that we can really go out then to the consumer services. Way over there on the right hand side of the screen, there are the institutional consumer services; whether it is your learning management system, or whatever it is, that we can now expose your data into those services through our APIs, through our web services and then on the left, of course, through your personal consumer services where it is astounding the traffic that comes to us from Google and Goodreads and Wikipedia that ends up in about a million times a month someone is on the open web, and they end up in a library somewhere because we were used as the switch. See, we are not really meant to be a hub, we are not where you go and hang out, we are a switch, like when you do a Google search it is a switch. You click on something and now you go there. That is our role in this, as the cooperative, to drive them into you from one of these personal consumer services or institution consumer services.