Against the Grain

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ATG Interviews Karen Phillips, Senior Vice President Global Learning Resource. SAGE Publishing

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ATG: *SAGE Publishing has recently expanded its learning resource offerings beyond scholarly content to include software/technology tools that enable librarians to support teaching, learning, and research.*

Can you tell us more about this new direction? What is the strategy behind these initiatives? What role are each of you playing in this effort?

KP: Our strategic direction is driven by our mission to build bridges to knowledge, to look for ways to improve the development and communication of ideas and knowledge between scholar and researcher, faculty and student. We work in partnership with the academic library to deliver on this goal, publishing relevant and reliable research and pedagogic materials, making sure to respond to library needs and goals as we do so.

Our research shows academic libraries changing priorities from focusing on book and journal collection development to focus on new types of digital content such as video in response to changing student and faculty needs. You may have noticed that we responded to those shifts with our video and case collections, data products, and the **Adam Matthew** primary source collections.

More recently, we have seen academic libraries invest in systems that can improve discovery, access, and usage of the library collections. We are keen to respond to the current need for good solutions that support student success and research; increase discovery and usage; and demonstrate ROI on library spend and services. As a result, beginning in 2018, we have shifted from focusing solely on publishing content to also offering software and technology that supports learning and research. This arm of the company was initiated by two acquisitions — **Talis** and **Lean Library** — and also includes transforming the technology behind some of our existing products so that they can be used as powerful library tools. I am the overall strategic lead in this area, and my role is to make the decisions about where we focus our efforts and set goals for what we want to achieve.

KS: As **Karen** outlined, we have embraced the fact that as a mission-driven organization, **SAGE** can grow to deliver beyond content (traditional or digital) to also play a role in enabling libraries, faculty, and students to succeed using software as a service (SaaS). As VP of

Pedagogy, I have been responsible for our UK books for several years and our global video products since they launched in 2015. Now I am also responsible for **Talis**, a SaaS organization providing resource list management systems (RLMS). **Talis** has developed software that helps drive library success, as well as student and faculty engagement with learning resources. We acquired **Talis** in 2018 in part because it supports our mission of building bridges to knowledge and could be enabled to do even more under **SAGE's** ownership, while operating as a stand-alone company.

ATG: *What impact will this new commitment to software and technology have on SAGE's ongoing efforts to create quality academic content for librarians and researchers? What are your plans for content creation going forward?*

KP: In short, this new development is in addition to our content-based publishing and does not replace other publishing plans at **SAGE**. We have a journals program with over a thousand titles, a leading social science college program, and a unique and fast-growing program of digital products for the library, such as **SAGE Video**. Our programs for eBooks and eReference, video, data, business cases, primary source archives and **SAGE Research Methods** are all resonating well with researchers and students; we have exciting plans for growth as we continue to deliver high-quality, relevant content to the library.

ATG: *From both of your perspectives, what would you say are the highlights of SAGE's new software/technology portfolio? What has the market response been to these new products so far?*

KS: I'll share a bit about **Talis**. What's really interesting about their RLMS product **Talis Aspire** is how well it serves wider strategic needs of the whole campus. **Talis Aspire** is a cloud-based solution for the delivery, engagement, management, and evaluation of course materials. With this product, libraries can manage the cost of course materials by increasing discovery of learning resources

available via the library or through the integration of open educational resources, and ultimately, provide greater transparency around affordability to students. Libraries can thus support an innovative teaching and learning experience for students with constant access to an up-to-date library resource list that can serve up content right where the students are in the LMS. From the instructor's point of view, the product offers opportunities to ensure the course design is working well for their students, giving them analytics that help assess progress in a time-saving way.

Libraries can increase their productivity with better data on what resources are being used in courses, informing acquisitions strategies. The system is built to fit with the library's workflows, including automated digitization and copyright solutions.

Talis started in the UK and has the majority of UK HE institutions as customers, with its own annual **Talis** Insight library conference where librarians gather to share how they are using the software, and to engage in its constant development as institutional needs change. I'm inspired by how we see libraries involved in the teaching and learning agenda of the university

in new ways. Issues around affordability, accessibility, open educational resources, library acquisition management and general library ROI are all part of the engagement we've been seeing.

Talis is working on a new product, **Talis Elevate**, which enables faculty and students to collaborate on class resources, encouraging engagement and insight and to inspire better teaching and learning experiences. This is

in "Early Access" with a small number of libraries, and we're learning a lot from it already.

KP: We are really excited to see the response to the **Talis** product within wider geographical markets. I will share a little about two very different products: **Lean Library** and **Quartex**.

We acquired **Lean Library** in the fall of 2018 and see the potential for this tool to help librarians address issues that seemed insoluble for many years. **Lean Library** reliably extends library resources and services directly in the user workflow by providing a browser plug-in that allows seamless access to library and openly available content from anywhere

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(on-campus or off). Using the library's unique branding, it illustrates the connection between accessed content and the library, improving the visibility of the library to patrons along the way. The product is unique in its fully supported range of services and is completely publisher agnostic.

It has been a privilege to work with the responsive and passionate **Lean Library** team, who are highly aligned with both **SAGE's** mission and that of the library. In fact, **Lean Library's** founder, **Johan Tilstra**, is himself a librarian, and the company was born out of his desire to fill a critical unmet need in the library.

Quartex is a new SaaS product, launched by **Adam Matthew** that extends the expertise the company brings to showcasing digital collections and makes it available to libraries that want to improve access to and usage of their own collections. Through the **Quartex** platform, libraries or societies can publish their special collections in an open access environment, where end-users can benefit from well-developed functionality for discovering and analyzing primary sources. **Quartex** includes handwritten text recognition technology, which employs AI to search manuscript materials. The product is just launched and we are hearing a lot of interest and excitement from libraries.

ATG: *What libraries can you point to that have been successful in implementing these products? And, regarding Talis Elevate, you mention it's in Early Access, when do you expect Talis to widen access to the product?*

KS: It is important to **Talis** to maintain an openness around customer experience of their products, and you can find a range of blog entries from librarians in the UK on how they have been successful with **Talis Aspire** at www.talis.com/blog (read about the **University of Oxford's** recent implementation, for example). The **Talis Aspire** User Group also shares examples of projects from universities such as **Liverpool**, **Kings College London**, and **Sheffield Hallam**. Further back (late 2018), there are also posts on the value of **Aspire** from the **University of Kent**, and the **University of Worcester**, for instance.

Regarding **Talis Elevate**, this moved in to Early Access with a small number of libraries in early 2019. We are working closely with the faculty and librarians at those institutions to understand how they are using the product to increase resource collaboration, student engagement, and analytics that helps both teachers and librarians deliver evidence-based course improvement. We are now ready to increase access to customers of this product, while ensuring we're listening to our early customers and developing **Elevate** further with their feedback and usage.

KP: **Lean Library** has an international customer base; early adopters include **Stanford University** and **University of Manchester** in the UK. Librarians from both universities

have presented this year at **ER&L** and **UKSG** respectively on their experiences of implementing **Lean Library** and the difference it has made to usage and for remote access in particular. Recent libraries to implement the product include **University of Pennsylvania**, **University of Newcastle** and **Utrecht University**.

ATG: *This emphasis on software and technology seems to be an industry-wide trend. What do you think this tells us about the challenges that librarians and publishers are facing as they try to meet the needs of today's scholar?*

KP: Today's scholars and students are used to excellent technology in their everyday lives and expect the same standards when they are looking for relevant content in the library or learning management system. Today's librarians have seen that they need to broaden their focus beyond collection development and include new skillsets and areas of focus to address this expectation and to grow the use of the collections they so thoughtfully curate. We're seeing an increase in technology-focused roles within the library that support teaching, and outreach roles focused on promoting the content in the library, getting the library message out to students and faculty where they are.

We see libraries increasingly using software to support access, discovery, and usage for library management, and to embed materials in the learning management system. From a publisher point of view, these changes mean not only that content needs to be delivered on reliable, robust, and accessible platforms, but also that the features and functionality within the platform are increasingly important. More recently, this has been a great space for intelligent innovation that can really add to the efficiency within the library and the service that the library has to offer, and this is the area that we are looking to move into with our new products.

ATG: *From your observations, what specific roles are librarians playing in promoting these products and assisting faculty and students using and implementing such products? How are librarians adjusting to these increased responsibilities? Can you cite specific examples?*

KS: **Talis** library customers have been able to deliver on a wider remit around teaching and learning success at their institution, which has increasingly been a key strategic drive at their universities. With the system, librarians can quickly report what required reading is not available in the library catalogue and make purchasing decisions accordingly, thus contributing to positive tracking on the affordability agenda.

As an example, librarians at **Auckland University of Technology** have done great work in engaging academics, offering variation in their approach, from one-to-one sessions, to online support, resulting in a growth of reading lists and increased engagement by academics and students with the system. But there are a range of other interesting opportunities that software like this can bring, which we have

seen librarians embrace. For instance, I saw a fascinating case study of the **University of Kent** using the resource list tool to launch a project aiming to improve diversity in the curricula (bit.ly/talisinsight).

KP: The library is the central partner for these products, which support the library and the universities' core strategies for learning and research.

On **Lean Library**, the library can market the tool using materials from **Lean Library** on how to download the browser extension and what it will enable. For example, the **Lean Library** team offers posters, email copy, social posts, discoverability checklists, and more to help with general promotion. Additionally, they offer outreach programs to faculty. Librarians also rely on word of mouth, which has often been noted as helpful in seeing increased usage.

A great feature of the **Library Assist** module is the ability of the library to set up messages that are delivered to the end user as they search for and access resources. During implementation, the **Lean Library** team offers a workshop to help set these up.

Key adjustments that libraries are making are implementing new roles and expertise — roles such as electronic resources librarian, or technology librarian, who work alongside collection development librarians.

ATG: *Again, from your observations, have these increased responsibilities taken resources from collection development activities? In times of decreased funding how are libraries stretching their budgets to purchase the content researchers need? What are you hearing from your customers about these issues?*

KP: While our research with academic librarians globally doesn't specifically report a reallocation of resources from collections development to systems and software, it does show that there is some uncertainty about the expected growth in the collections development budgets, and there are signs that budget increases are just as likely to be seen in staff costs or new systems and software.

KS: It's also important to note that **Resource List Management Software** enables wider use of content in the collections which may not have been noticed to date as a learning resource. Of course, there is the opportunity to also engage **Open Educational Resources** alongside that, but this shouldn't negatively affect the collections development budget. As the university's strategic agenda evolves around student success, **Talis Aspire** has the ability to enable improved visibility around what is used for teaching and learning and thus provide good intelligence on how to spend the collections budget.

ATG: *And can you cite specific examples of intelligent innovations that Karen mentioned above that librarians are developing using these products?*

KP: I was referring to the products as intelligent innovations that libraries are adopting to have impact on their ability to deliver value

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to the institution. Taking the example of **Lean Library**: it enables the librarian to deliver seamless remote access, saving faculty and students precious time. It also enables them to get out clear messaging about the libraries role in bringing resources to patrons thus raising the profile of the library. And it can help the end user find alternative routes to access the resources that they are looking for, automating interlibrary loan, or suggesting OA materials where relevant.

ATG: *From your experience are these non-content offerings changing the dynamic among librarians, publishers, and scholars? Do these more sophisticated products call for changes and adjustments in the current relationship among stakeholders? In short, are they changing the traditional business model? If so, how?*

KP: I think the main change is that technology makes the stakeholders more connected and gives the publisher and library more visibility on the types of content that faculty and

researchers are using. It can better inform collection development and make it more targeted and responsive to patrons' needs. The library and publisher may also become more seamlessly integrated into the natural workflow of the patron. For instance, rather than expecting the student or researcher to sign into the library website, technology enables the library to get relevant content instantaneously, as delivered via **Lean Library**.

Our **Lean Library** product is a good example of a technology solution that gets content into the researchers' workflow. It not only supports remote access, but also enables access to content directly via the web browser that the researcher uses, giving them smooth access to library content.

An example of technology enabling changing business models is **Adam Matthew's Quartex** platform. It constitutes a service to libraries, enabling them to easily display their special collections — without technical knowledge or recourse to IT teams — and make available to academics, researchers, and the public — material that previously may not have been accessible or easily searchable.

KS: I echo **Karen's** point about increased connectivity. What's also new and exciting for us is how these developments have encouraged us to develop a content-agnostic approach in some of our offerings. **Talis Aspire**, **Talis Elevate**, **Lean Library** and **Quartex** are all about software solutions that demonstrably make the best use of the content that students or scholars require from their libraries regardless of publisher, served up to them as readers wherever they are. But these tools are able to go beyond offering content to providing an experience of the task, be it learning or research, which can increase patron success.

ATG: *It also strikes us that such offerings provide opportunities for libraries and publishers to broaden their impact on the scholarly community. Are you seeing evidence of that broadening impact? If so, how are scholars reacting to this increased role for librarians and publishers?*

KS: We are certainly seeing evidence of opportunities to broaden library impact, be it through higher levels of engagement with materials, new ways of enabling engagement, or better ability to access data and analyze the use of resources. For instance, **Talis Elevate** shows how student anxiety around class engagement with scholarly material can be mitigated through anonymization of class comments, and how faculty members can position their course organization in ways that are responsive to student engagement. **Talis's** Insight conferences tend to be filled with different institutional case studies on the impact of the product on wider university strategies and in particular on the teaching and learning provision (most videos of these sessions are freely available on the **Talis** website: <https://talis.com/>).

KP: It's too soon to assess the complete impact of these new technologies on scholarship. While **Talis** has years of experience that give a clear picture of their impact, for **Lean Library** it is early days, but we are seeing real-

ly good usage where the product is embedded. At **UKSG** this year, **Tim O'Neill** (Electronic Resources Co-Ordinator at the **University of Manchester**) gave a presentation showing the impact of **Lean Library** on usage at his institution with clear evidence that **Lean Library** is saving academics time as they get to the relevant materials for their research.

ATG: *Can you both look into your crystal balls and give us your forecast as to how you see the market for learning resources evolving in the next few years? Where do you see libraries fitting into that market? How about the individual scholar?*

KP: I see the library as resilient and evolving in a fast-changing higher education environment and would predict that librarians will remain the information experts responsible for enabling scholars and students access to relevant materials. I think collection development will remain important and technology will grow in importance: to support administration of the library, support efficient collection development, and contribute to the higher ed strategies in relation to both research and teaching.

KS: I see libraries engaging more actively with reliable technology in ways that enable learning resources to add even more value, and also with new models and content types, including open educational resources. I feel we're seeing libraries taking a stronger role in student learning and student academic success, especially as technology enables a more connected experience across faculty, students and librarians. With these developments, I expect individual scholars to have a better experience finding trusted content and recognizing the role of their libraries in enabling that.

ATG: *We've been asking some serious and important questions, but we'd like to end on a lighter note. We were wondering how you like to unwind and relax? What fun things do you do when you can get away from the office and find some down time?*

KP: I have two addictive hobbies that I love to follow when I have time. First, I love watching contemporary dance; I have a local theatre, Sadlers Wells, which shows the best contemporary dance in London. My next visit will be for a dance performance which combines Flamenco and Jazz! It should be interesting.

My other love is football (or soccer as you call it in the U.S.). I am a season ticket holder at Arsenal (a top football team in England). I love following the team's performance, the stadium is spectacular and it's great just sitting out in the fresh air watching the drama of a match. Right now I'm enjoying watching the women's world cup and I'm looking forward to the football league starting up again in August!

KS: My hobby is swimming; I've always enjoyed the sensation of being in the water, it makes me feel free. I've been challenging myself to improve my stroke technique recently, and even signed up for a few lessons a month ago — and my tumble turn seems to be on the up! 🐬

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Endnotes

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