



Words of Wisdom on Collaborative Projects

“Beyond the Local (East Asian) Collection: Re-
thinking Boundaries in the 21st Century Library”

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Getting Started

- Collaborative projects develop when **something needs to be done that cannot be achieved by just one institution.**
- Look for things that are **more effective at scale** or big wins.
- Need a **common and shared vision.**
- **Vision statement** very important; think about a big vision and articulate it.
- Need a **strong central thrust.**
- Need a **passion** about the project.
- Have **key players in the room** from the beginning.

Keys to Success

- **A partnership of equals:** Institutions need to be in a similar circumstance, at the same time and projected time frame, have similar means, and most importantly, have similar goals.
- **A culture of collaboration:** agreement to not compete with partners in the space related to the collaboration.
- **Leverage existing collaborative infrastructures:** There is a need to have “centers of gravity” that facilitate the nurturing of new collaborative projects.
- The best projects have a **co-investment in infrastructure.**
- **Strong leadership from the beginning.** A few committed leaders.

Keys to Success -- 2

- **Strong institutional commitment**, in addition to the dedication of individuals. If an individual leaves, momentum is often lost.
- Write out **blueprint of the organization** in the early stages. **Clarity about roles** is very important.
- Try to cajole institutions into a **collective standard**.
- **A board/executive structure to guide/oversee project**: Only institutions who contribute resources get to have a say. "Bring the gold, make the rules."
- **A good project manager** hired by the board: project management/a strong project manager are critical. Projects need a lot of follow-through.

Keys to Success -- 3

- **Work should be broken into a functional group and a technical group:** The functional group articulates what the product should do and be. The technical group executes the building of the product to meet those specs.
- **Product must solve an existing higher education problem:** The participating schools should build and use the product on their home campuses to prove it is solving a problem.
- **Think entrepreneurially:** “Run it like a start-up.” “Think like a start-up.” “Be bold.” “Be revolutionary.” “Break out of the box”.
- Collaborate but **think bigger than the sum of the parts.**

Keys to Success -- 4

- **Form collaboration from the top-down:** If it were up to developers, some collaboration would not have happened. There must be leaders with entrepreneurial outlooks. Go to the top-levels of libraries or other institutions to build lasting, significant partnerships.
- **Attract talented, committed people:** This is done by cultivating a network and building loyalty with relationships. Must convey something exciting, relevant, and new is happening. Convey risk factors—get people willing to take risks.

Keys to Success -- 5

- **Keep local staff satisfied** if you want to maintain buy-in.
- **Communicate decisions/consensus** to the broader community (who is making decisions and why), especially if project is director-driven.
- **Talented evangelists and marketing strategy:** Have a community outreach strategy; build brand identity around mission.
- **A strong sales strategy:** Market the project, just as you would a commercial project.
- **Use central funds** to make purchases without needing approval of the individual partners.

Potential Challenges

- **It takes time** to build trust among the collaborating partners.
- Sometimes **"There's no project to sign up for, it's an idea."**
- **Patterns of funding are a problem**; funding agencies have to rethink and relearn how to support large, collaborative projects.
- **Things almost always turn out to be harder to do** than expected.

Lessons Learned

- Think about the strengths and weaknesses of all potential partners. **Some partners are better than others.**
- A history of **successful collaboration breeds more collaboration.**
- Use **personal connections** to organize original collaborators.
- There should be a **unified voice** right from the start.
- Always try to **assemble an advisory group** for each project.
- The **building of trust** is a very social and cultural issue; it has nothing to do with technology.

Lessons Learned -- 2

- **Our greatest impediment is us**; large, collaborative projects are a new frame of reference, a new cultural environment.
- **Learn to let go of some control and learn to trust**—both institutions and individual people associated with them.
- **Take advantage of the financial benefits of doing things at scale**. Libraries may not be associated with individual institutions in the future. There is not just economic or user-based benefit to unbundling the library from the institution—also changing the way institutions work together as scholarship is more collaborative inter-institutionally. It makes sense for libraries that support them to be at scale and serving more than one institution.

Lessons Learned -- 3

- It's important to **have existing structures in place** that you can leverage.
- **Leverage existing resources.** Don't re-invent the wheel.
- **Leverage internal resources** where appropriate, **outsource work** where appropriate.
- **Leverage shared resources for innovative uses.** Go beyond the original purposes or benefits of the resource; mature beyond the original purpose of the collaboration.
- **Observe the three pillars of sharing:** shared infrastructure; shared services; and shared risk investment.

Lessons Learned -- 4

- **Carefully weigh risks and benefits:** Sometimes collaboration itself can introduce risks when functions such as digital preservation are concerned. Need to balance structures, consistency, standards with the participation of multiple institutions.
- • It is critically important to **get any project out there and used as early as possible.**
- • **Deal with the free-rider problem to address sustainability.** Want to be shared broadly, but have to find a way to manage that.

Lessons Learned -- 5

- **Do not rush to governance structure too quickly.**
Don't set up structures before the entity is fully formed. Infancy needs to be treated differently than adolescence or early adulthood. More formalized structures need to be put in place to guide something once it gets past infancy. Take an evolutionary path toward sustainability.
- Define project, set goals and priorities, based on **grassroots consultation** and **broad member participation**.
- **Expand the partnerships** to continue success.

Lessons Learned -- 6

- **Think critically about forming corporate and project partnerships:** Think with a business head rather than an academic researcher's head—avoid the tendency to want to join together. Continually ask whether a potential partnership would forward the mission. Evaluate whether there are shared goals. Engage in a process similar to portfolio analysis.
- **Foster direct relationships of individual schools** with project partners, especially commercial partners.
- **Be bold, take risks, but be aware of risks and create contingency plans.** Must maintain financial stability. "Finding out what the sweet spot is—you have to be in it."
- **Demonstrate success.**

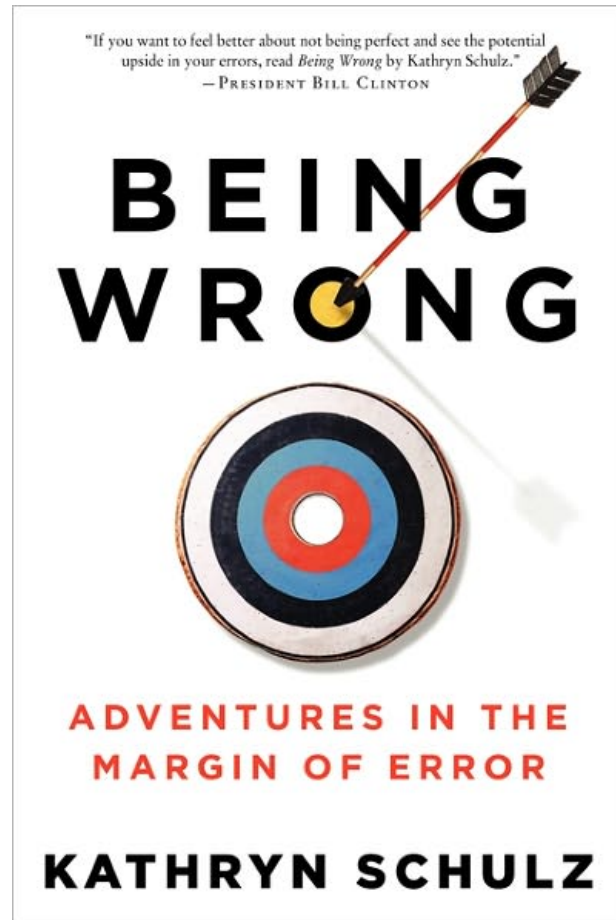
Lessons Learned -- 7

- **Streamline the on-boarding process** and other processes.
- **Do not give individual partners too much latitude** to do things the way and when they want.
- Can't operate under the premise that everybody needs to be in agreement. Need to be able to **twist arms, make decisions, move quickly**.
- Try to **avoid spending too much time following one person's idea** without seeing if it is doable or of broader interest; need better strategies in managing grassroots ideas.
- Consortia should **focus on shared technology** so partners can be freed up **to do more innovative work**.
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Lesson Learned...

Incremental change
lands you on the rocks.



"Being Wrong:
Adventures in the
Margin of Error"
by Kathryn Schulz

Being Wrong

“To err is to wander, and wandering is the way we discover the world; and, lost in thought, it is also the way we discover ourselves. Being right might be gratifying, but in the end it is static, a mere statement. Being wrong is hard and humbling, and sometimes even dangerous, but in the end it is a journey, and a story.

Being Wrong

“Who really wants to stay home and be right when you can don your armor, spring up on your steed and go forth to explore the world?”



Being Wrong

“True, you might get lost along the way, get stranded in a swamp, have a scare at the edge of a cliff; thieves might steal your gold, brigands might imprison you in a cave, sorcerers might turn you into a toad-but what of that? To [mess] up is to find adventure.”