Smarter Libraries through Technology:

The People Who Shape the Industry

By Marshall Breeding

One of most appealing aspects of the library automation industry is the interesting people involved. From those who lead the companies to those who work behind the scenes developing new technologies, I've been fortunate to rub elbows with many of the cast of characters who have shaped the library automation landscape. I recall so many conversations where I have verbally sparred with individuals over technology, strategy, or business, learning a great deal in the process.

We work within a relatively small field comprising a finite number of companies serving the library community. Individuals frequently move from one company to another. It's not unusual for someone working in libraries to go to work for a vendor, or vice versa. I think that experience on both sides of that fence provides valuable perspective. Organizations that create products for libraries certainly benefit from having some in their ranks who have actually used their wares. Those that come to work for libraries from a vendor often bring along a sense of accountability and a knack for dealing with complex organizations.

The reality of the musical chairs that so often happens among individuals, the companies, and the libraries they serve translates into a more collegial environment. While there are exceptions, the competition among companies generally keeps to a relatively friendly tone. It does not pay to make enemies in a small industry where everyone knows everyone else and where you might end up working for your rival next year.

This issue of *Smart Libraries Newsletter* covers news about several people in the business, including the appointment of Skip Prichard as the new President of OCLC. I expect interesting changes in this critical organization as it comes under new leadership. We also mention some of the cross pollination of personnel as executives jump from one company to another. Finally,

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we also note the passing of another of the pioneers of the industry, Brower Roberts. I recall meeting him briefly in the ALA exhibit hall only once and many years ago.

As I write about the library automation industry, I'm always interested to learn as much as I can about the people behind the story. It's fascinating to trace the family trees of the companies and the background of the people involved. I hope that readers appreciate as I do knowing a bit more about the people and personalities.

EBSCO Consolidates its Library-oriented Subsidiaries

In a major move that consolidates the two library-oriented subsidiaries of EBSCO Industries, Inc. that have operated separately for almost 30 years, EBSCO Publishing and EBSCO Information Services will combine into a single company. Tim Collins, President of EBSCO Publishing, will lead the consolidated company as its President and Chief Operating Officer. Allen Powell, formerly President of EBSCO Information Services, will continue to lead the company's subscription services business, reporting to Collins. The new company will operate under the name EBSCO Information Services. The reorganization will be effective on July 1, 2013.

EBSCO Information Services and EBSCO Publishing have been involved in increasingly overlapping business activities in recent years. EBSCO Publishing focused on the development and production of content products and tools related to their access. EBSCO Information Services was more involved in services and technologies for libraries related to the acquisition and management of subscription-based resources. EBSCO reports that while the two companies have worked together closely all along, they will be fully integrated into a single business.

EBSCO Publishing and EBSCO Information Services, operating as independent companies, each developed their own technology infrastructure for the deployment of their products and services. EBSCO Publishing relies on EBSCOhost as the platform for publishing its content products, and EBSCO Discovery Service as its Web-scale discovery platform. EBSCO Discovery Service provides access to an expansive representation of library resources, including the collections managed by the library's ILS and non-EBSCO electronic resources. EBSCO Information Services created EBSCONET to support its subscription services and to provide tools to libraries to assist in the management of electronic resources. Services based on EBSCONET included ERM Essentials, the LinkSource link resolver, and the EBSCO A-Z service. The EBSCONET product suite also includes Usage Consolidation and Usage Loading Service.

Prior to the merger of the two businesses, efforts were already underway to consolidate their technology platforms.

In January 2012, EBSCO announced that it would shift its A-Z and LinkSource utilities to the EBSCOhost platform. Link resolution and tools for browsing or searching e-journal titles and the knowledge bases underlying them seem intrinsically related to discovery, making it beneficial for these reside within the same infrastructure. EBSCO reports that A-Z and LinkSource will be redeveloped as a new product named Full Text Finder, deployed either as a standalone product or a component of either EBSCOhost or EBSCO Discovery Service. Full Text Finder will be provided to existing EBSCO Discovery Service customers without additional cost. EBSCONET, the strategic platform of the incumbent EBSCO Information Services, provides functionality to libraries for managing their print and electronic subscriptions. ERM Essentials provides a complete electronic resource management system. EBSCONET previously also included the EBSCO A-Z e-journal finding aid for library users and the LinkSource link resolver, but these two components have been shifted to the EBSCOhost platform.

The merger of these two business units results in synergies and streamlining in the company's technology platforms. The organization retains the name EBSCO Information Services, which better characterizes its products and services.

Organizational Background

EBSCO Information Services and EBSCO Publishing have operated as independent subsidiaries of EBSCO Industries, Inc., a massive, privately-owned, diversified group of businesses. In addition to these two library-oriented businesses, EBSCO Industries is involved in real estate, manufacturing, outdoor products, and other areas, along with a central set of corporate services that support all of its businesses. EBSCO has continually grown through the acquisitions of companies with the potential to expand within each of its areas of interest and to increase its revenues. In previous years, EBSCO Information Services and EBSCO Publishing were considered part of the Information Services Division of EBSCO Industries, operating as separate companies.

	Previous Structure		New Organization
Subsidiary	**EBSCO Information Services**	EBSCO Publishing	**EBSCO Information Services**
Headquarters	Birmingham, AL	Ipswich, MA	Ipswich, MA
President	Allen Powell	Tim Collins	Tim Collins
Technology Platform	EBSCONET	EBSCOhost + EDS	EBSCOhost + EBSCONET + EDS

EBSCO traces its history to the entrepreneurial activities of Elton B. Stephens, with the founding in 1944 of Military Services Company to sell magazines, bindings, and racks to US military installations. The company has steadily grown through the acquisition of other related companies.

EBSCO Publishing got its start as a family business in Ipswich, MA that created summaries of magazine articles, which they published in a newsletter. Founded in 1984 by Gerald Seaman and Tim Collins, the company , called Popular Magazine Review, had expanded considerably by the time EBSCO Industries acquired it in 1987 and renamed the product Magazine Article Summaries. That year EBSCO Industries had also acquired Horizon Information Systems, a company founded in 1985 to create search and retrieval software for databases distributed on CD-ROM, with Oliver Pesch leading the development process. These two companies were combined to form EBSCO Publishing. In 1991 the company began issuing prod-

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ucts on CD-ROM, and in 1995 EBSCOhost was introduced, providing access to its database products via the Internet. In 1992 EBSCO Publishing began to cover scholarly journals in its databases in addition to popular titles.

Today EBSCO Industries, Inc. ranks among the largest 200 private companies in the United States with estimated revenues of around $2.5 billion. As a closely held private company, EBSCO Industries does not release financial details for itself or its subsidiaries. Dixon Brooke serves as its Chief Executive Officer.

Northern Ireland Opts for SirsiDynix and Bibliotheca for National Library Infrastructure

The country of Northern Ireland operates a country-wide library service called Libraries NI, including around 100 libraries, serving a population of around 1.8 million. Libraries NI was formed in 2009 through the merger of four regional library services.

The E2 Project included renewal of several components of the technical infrastructure throughout the library service including its public access network, virtual library for access to its collections and services via the Web, RFID-based services, its corporate network for administrative support, business intelligence for data-based decision making, and

a customer relationship management system (see Libraries NI Annual Report and Accounts 2011-2012). Libraries NI awarded a project totaling £25 million to a consortium of vendors led by Fujitsu UK and Ireland to provide a comprehensive renewal of its information technology and library automation infrastructure. This consortium includes SirsiDynix, which will provide its Symphony ILS and Enterprise discovery interface as well as its BookMyne mobile app, Social Library native Facebook application, and its SMS messaging module. SirsiDynix Symphony will replace the Axiell OpenGalaxy ILS in place since 2002.

SirsiDynix previously had a presence in Northern Ireland. The Northern Ireland Government Libraries consortium selected Symphony in 2005 as the automation system for six government department and three agricultural college libraries.

Bibliotheca will provide RFID-based products for the project, including RFID security gates in each of the libraries and self-service equipment in twenty of the largest libraries. More than 400 self-service kiosks with integrated payment capabilities will be deployed. Libraries NI holds a combined collection of 1.8 million items, all of which will receive RFID tags. Bibliotheca reports that this project will represent the largest RFID deployment in the United Kingdom.

Fujitsu, as the lead vendor, will manage the overall implementation and will provide complete IT support to Libraries NI for the five-year term of the contract. In addition to library automation provided by SirsiDynix and RFID technologies from Bibliotheca, the project includes upgraded network infrastructure, including Internet access and Wi-Fi.

This project stands out as noteworthy as an instance of the trend toward shared technology infrastructure for librar-

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ies. This contrasts with an approach where each library independently implements its own automation products. Shared infrastructure offers the potential for lower technology costs per library and for providing access to a larger collective collection to library users. Other examples include the current procurement process underway for the country of Denmark, the OneLMS project in the state of South Australia, and many others. In the US many states are working toward developing statewide opt-in automation projects. With the almost unlimited scalability of today's technology, we can anticipate increased numbers of libraries participating in large-scale shared automation projects rather than implementing stand-alone systems.

Civica Finds New Private Equity Ownership

Civica, a large international information technology services firm that provides products for a wide range of local government services, including library automation, recently changed ownership. Civica has been under ownership of 3i since April 2008 (see "Civica Transitions to Private Equity" *Smart Libraries Newsletter,* June 2008), bringing the company under ownership of a large private equity firm following a period of public ownership, traded on the London-based AIM (Alternative Investment Market). OMERS Private Equity, with investment capital of over $6 billion acquired Civica from 3i Group Plc. in a transaction valued at about £390 million. The company reports that it does not anticipate major changes in its executive management or in its operations as a result of this transition.

Civica includes the Civica Library and Learning business unit that provides software and services to libraries and educational institutions. Its major projects include the Spydus integrated library system, the Sorcer portal product, a digital asset management system called Blis, the VLTreck learning management platform. The company also offers outsourcing services to libraries, with the Singapore Department of Education as a major client. Across all its operating units, Civica

employs over 2,000; Civica Library and Learning reports a total of 425, many of which work in libraries through its outsourcing contracts.

Most of the large library technology providers are owned by private equity firms:

- Civica Library and Learning: OMERS Private Equity (Since 2013)
- SirsiDynix: Vista Equity Partners (Since 2006)
- Innovative Interfaces, Inc: JMI Equity and HGCG (2012)
- Ex Libris Group: Golden Gate Capital (2012)
- Infor Library Services: Golden Gate Capital (2006)
- Bibliotheca: One Equity Partners (2011)

Library automation companies remaining under ownership by founders or employees include Polaris Library Systems, VTLS, Axiell Group, Follett Corporation, and the Library Corporation. Auto-Graphics is the only public company in the library automation industry, operating as a wholly owned subsidiary of Agent Information Software, Inc. (AIFS).

SydneyPLUS Morphs into Lucidea Corporation

A new company, Lucidea Corporation (http://www.lucidea.com), has been formed through the re-organization of SydneyPLUS and its acquired companies. Lucidea brings together the products and services of SydneyPLUS, Inmagic, Cuadra Associates, Argus.net, LawPort, Lookup Precision, and Incite Software Solutions, all owned by Ron Aspe and previously operated as separate companies. These companies previously operated independently, though in close consultation with each other and taking advantage of shared administrative support. They will now combine into a single company under a unified executive management team, with Ron Aspe as the President and Chief Executive Officer and Phil Green as Chief Operating Officer. Green was previously CEO of Inmagic.

Lucidea reports that more than 2,300 organizations in 50 countries make use of its products. The new company employs a workforce of 80 individuals. In addition to its global headquarters in Richmond, BC in Canada, Lucidea will maintain office locations in Nottingham in the United Kingdom, as well as the former Inmagic headquarters in Woburn, MA, the Cuadra facilities in Los Angeles, CA, and in Moorpark, CA. Lucidea is privately owned by Ron Aspe.

Lucidea offers a product suite that includes those developed by SydneyPLUS and by its acquired companies. Each of the product brands as they were known before the corporate restructuring will be maintained. In the arena of library automation, Lucidea will offer the SydneyPLUS LMS, Inmagic Genie, and CuadraSTAR Libraries. For museum management, products include CuadraSTAR Museums and ARGUS.net. Knowledge management or content management platforms include Inmagic Presto, SydneyPLUS Information Manager, Inmagic DB/TextWorks, and ISS Messenger Workplace. Lookup Precision and LawPort provide support for the operation of law offices and other legal organizations. CuadraSTAR Knowledge Center for Archives is available for the management of archives.

The company provides technology products in what is generally considered the special libraries sector, through many of the organizations are not necessarily traditional libraries. The types of organizations Lucidea targets include law firms, corporations, pharmaceutical companies, museums, archives, and governmental agencies at the federal, state, and local level. Key competitors to Lucidea in the special libraries arena include EOS International and Soutron International.

Strategic Continuity and Convergence

According to Chief Operating Officer Phil Green, the core message that Lucidea wants to convey to its current and future clients is that this transition will not bring disruption. The company will continue to maintain all of its products and that the same individuals will continue in their sales and support roles. The existing brands and websites will continue, though subsumed under Lucidea as its new corporate identity.

This consolidation will bring operational efficiencies by unifying the sales, marketing, and development efforts of each of the antecedent companies. This consolidation will allow the company to provide better service to its customers by having the ability to allocate resources as needed. With single sales and marketing forces, the company can more strategically target its products to potential customers. In a mid-sized company of 80 employees, having separate independent efforts in these areas has less impact than a unified force. Prior to this business transition, the only aspect of the company that was shared across the antecedent companies was administrative support functions such as accounting and human relations.

A unified research and development operation will result in better integration among its products, which will be especially helpful for those customers that make use of multiple products from the company. It will also facilitate product the consolidation of technology components among the different products. One of the strategic development directions involves the separation of workflow products from search and discovery tools. The company, for example, can position Presto as a search and discovery engine able to work across any of the company's ILS products, such as Inmagic Genie, SydneyPLUS LMS, or CuadraSTAR Libraries; or through federated search with external or internal content resources. Some consolidation of back-end technologies has already taken place, with the SydneyPLUS platform now underpinning some of its acquired products, such as the ARGUS.net product for museums and for LawPort.

Corporate History

The establishment of Lucidea follows a sequence of events of almost 25 years of developing products and acquiring companies or technologies oriented to special libraries and related organizations. Some of the major business transitions include:

- **June 2013:** Lucidea formed through the consolidation of the SydneyPLUS family of companies.
- **January 2012:** In a subsequent transaction, SydneyPLUS acquired the assets of remaining from its 2011 acquisition of Inmagic, including the Presto technology.
- **October 2011:** SydneyPLUS acquired the library automation assets of Inmagic, including DB/TextWorks, Genie, and the Inmagic brand and trademark (see "SydneyPLUS acquires Inmagic Assets: Continued Consolidation in the Special Library and Knowledge Management Solutions Arena" *Smart Libraries Newsletter,* Dec 2011).
- **May 2010:** SydneyPLUS acquired LookUp Precision from Advanced Productivity Software. This product, primarily targeting large law firms, performs use tracking, cost recovery, and password management of online legal resources.
- **March 2010:** SydneyPLUS acquired Questor Systems, a California-based company which had created the ARGUS platform used for the management of collections of physical artifacts, such as those in museums and archives.

- **July 2008:** SydneyPLUS acquired Cuadra Associates, a company that develops and supports the STAR family of products for the automation of libraries, museums, and media collections and for knowledge management and records management.
- **August 2007:** SydneyPLUS acquired SV Technology, developer of the LawPort platform that provides a knowledge management platform for legal organizations based on Microsoft SharePoint.
- **2001:** SydneyPLUS acquires Incite Software Solutions, formerly known as InfoNet Software Solutions and before that as OSIWare, a company specializing in messaging and e-mail services (www.iss.ca).
- **January 2000:** International Library Systems was renamed to SydneyPLUS International
- **March 1989:** Ron Aspe forms International Library Systems through an employee buy-out of the library automation product of Sydney Development Corporation.

People in the News

OCLC Appoints New President

Following a renewed year-long executive search, David "Skip" Prichard has been named as OCLC's new President and Chief Executive Officer. OCLC has been seeking a new President and CEO since Jay Jordan announced his retirement in June of 2011. Jack B. Blount was tapped for this position in June 2012, but that appointment was abruptly withdrawn shortly thereafter. Jordan delayed his retirement to remain at the helm of OCLC another year, giving the organization stable leadership through the extended search process. Prichard's term as President and CEO will become effective on July 1, 2013.

Prichard comes to OCLC with extensive experience with large and complex companies in the library and publishing arena. He has previously held leadership positions at Ingram Content Group, ProQuest Information and Learning, and LexisNexis. Each of the organizations in which he has held leadership positions is involved in providing services to libraries, consistent with OCLC's mission. OCLC's structure as a non-profit membership organization presents a different set of challenges. Jay Jordan likewise had a corporate

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background, with a 24-year career at Information Handling Services. It seems that this time around OCLC has opted for high-caliber professional executive management rather than a more entrepreneurial personality.

Most recently, Prichard served as the CEO of Ingram Content Group, a very large organization with around $1.5 billion in annual revenues employing more than 3,000 personnel. OCLC's annual revenue for 2012 was $203.5 million. Ingram Content Group has a variety of business activities, generally focused as a service provider for publishers. The company also directly supports libraries, especially through services related to materials acquisitions, such as OASIS (Online Acquisitions and Selection Information System), MyiLibrary content hosting platform, and ipage. Under Prichard's leadership beginning

OCLC President	Term
Frederick G. Kilgour	1967–1980
Rowland C. W. Brown	1980–1989
Dr. K. Wayne Smith	1989–1998
Jay Jordan	1998–2013
Skip Prichard	2013–

in 2007, Ingram saw the integration of a number of business units into a unified company under the name Ingram Content Group. Prichard left the Ingram about a year ago, in June 2012. John R. Ingram, who also serves as its Chairman, stepped into the CEO role following Prichard's exit.

Prichard was CEO of ProQuest Information and Learning from October 2005 until April 2007, exiting following a transition period after the company's acquisition by Cambridge Information Group in December 2006. Beginning in April 2003 Prichard served as Senior Vice President, Global Sales, ProQuest Information and Learning. Prior to his tenure at ProQuest, Prichard was a Vice President for LexisNexis.

Prichard's educational background includes a Juris Doctor in Law from the University of Baltimore School of Law and a Bachelor of Science from Towson University.

Each of the OCLC presidents has led the organization through different phases of growth and strategic direction. WorldCat, the organization's key asset, has seen phenomenal growth in recent years, having exceeded 300 million bibliographic records representing more than 2 billion individual library holdings. Prichard comes to the organization during a critical time, where a new generation of its products and services based on the new WorldShare Platform is poised for adoption, though it also faces formidable competition from commercial vendors. It will be interesting to see how OCLC shapes its strategies in its next phase under its new president with a strong background in the library vendor arena.

Axel Kaschte Joins OCLC

Axel Kaschte has joined OCLC as its Product Strategy Director for EMEA. From 2009 through May 2013 he served as the Strategy Director for Europe for Ex Libris Group. Beginning in 2003 Kaschte worked as a Technical Director for Dynix and continued with the company when it transitioned to SirsiDynix.

Innovative and Polaris Continue Executive Musical Chairs

In January 2013 Polaris Library Systems hired Neil Block as Vice President of Strategic Growth following his exit from Innovative Interfaces the prior December. Returning the favor, Innovative Interfaces has hired Steve Nielsen as its new Vice President of Strategic Accounts. Nielsen served as VP of Product Management at Polaris beginning in September 2011. He served as director of the Bettendorf Public Library from 2008 to 2011 and was a VP for Product Management for Dynix.

In other news at Innovative, Mary Chevreau , VP for North American Sales, departed the company in January 2013.

Brower Roberts (Brower Murphy) Dies

Brower Roberts, one of the pioneers of the library automation industry, died on May 24, 2013 at the age of 74. Roberts, previously known as Brower Murphy, or "Murf," was a co-founder of The Library Corporation with his then wife Annette Murphy in 1974. Brower Murphy departed the company in 1996 and since that time Annette Harwood Murphy has led the company as its Chairman and Chief Executive Officer.

During his involvement in the library automation industry, Brower Murphy was known as an innovator, launching one of the earliest products based on CD-ROM technology, Biblio-File, in 1985. A decade later he led the development of NlightN, an early Web-based search product of diverse library-oriented resources, not entirely unlike the genre of index-based or Web-scale discovery products available today. NlightN did not, however, see commercial success. Following his departure from TLC, Roberts pursued other interests outside of the library automation industry.

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