LYRASIS: A Collaborative Success Story

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As LYRASIS ends its groundbreaking first year, we conducted in-depth personal interviews with the library pioneers and change agents who participated in the creation of the nation's largest membership organization serving libraries and information professionals, formed from legacy organizations in the Mid-Atlantic region (PALINET), the Southeastern region (SOLINET), and the New England region (NELINET). LYRASIS was a watershed in library collaboration, unprecedented in scale and with far-reaching industry implications.

The key participants in this venture – from varied libraries across a wide geographic area - offer unique viewpoints on the process of creating a new organization that was not just bigger, but entirely new in its vision and scope. Excerpts are taken from recent interviews with participants, about their roles at the time, including Carol Pitts Diedrichs (formerly SOLINET Board Chair), Arnold Hirshon (formerly NELINET Executive Director), W. Lee Hisle (formerly NELINET Board Chair), Joe Lucia (formerly PALINET Board Chair), Richard Madaus (formerly SOLINET Board Member), Kate Nevins (formerly SOLINET Executive Director), and Cathy Wilt (formerly PALINET Executive Director).

In sharing their perspectives on the collaboration, these leaders offer new ways of thinking about library collaboration and insights into the future for all libraries.

The Impetus for a New Organization
LYRASIS was established in 2009 by the merger of PALINET and SOLINET and joined shortly thereafter by NELINET, a move that was unanimously recommended by the Boards and overwhelmingly approved by members of all three networks.

Kate Nevins: "Frankly, our members had more needs than we could accommodate. Members needed change and we didn't always have the capacity to accommodate."

Joe Lucia: "I think the main impetus was the opportunity we saw to create a new context for library cooperative activity in a way that was not directly linked to the legacy—the sharing of cataloging data and those kind of services—but to look forward to new kinds of challenges. We asked ourselves if a large alliance like this might open new doors."

Carol Pitts Diedrichs: "We knew there were going to be changes in the way OCLC did business with networks, but we had a vision for the new organization that went beyond those issues."

Arnold Hirshon: "We were looking to diversify our programs and some of them required more scale than any one of the networks had the resources to do on its own."

Cathy Wilt: "In the age of technology, here was an opportunity to reduce infrastructure on a scale that was not considered before."

Richard Madaus: "We had an expressed desire not to just do the same thing bigger, but to focus on opportunities created by an organization that could serve libraries in new ways."

The State of the Legacy Organizations
What was the state of the individual networks before joining together? Were the mergers born of panic? Planning? Or some combination thereof?

Cathy Wilt: "We were the optimal strong partners. We had a five or six year period of increasing financial strength. We were in good shape… . But it was a clearly changing

landscape for libraries and their regional cooperatives. And we saw the opportunity to achieve more together than we could separately."

Arnold Hirshon: "Our organization and assets were strong. While our immediate future was very secure, we thought it was important to take a strategic and long term view. The rapidly changing economy was affecting all libraries. All three networks collectively were exploring the best ways to sustain and grow services for our members. As we looked at multi-year scenarios, it was clear that the best way to do this was through the consolidation of our operations."

Kate Nevins: "We were a robust organization, deeply engaged with our members across the region, with a long and venerable history—a positive place to be. But we recognized that which had gotten us here would not necessarily carry us forward; we had to build on all those things."

W. Lee Hisle: "We knew we had a product, if you will, that was valued by our customers. We were searching for the right way to move forward."

Carol Pitts Diedrichs: "We always knew that libraries were constantly looking at cost benefits of the memberships they held and we were very keenly aware that our members had options, choices… . It was a stewardship issue—to be constantly looking at what value we were providing and whether or not the marketplace still needed that value."

Joe Lucia: "We had a strong future as a regional library cooperative but we were looking at future avenues for growth and evolution. We were not in a state of desperation by any means."

Why Merge or Join?

There are other options available to organizations facing the need to change. What tipped the scale for the legacy organizations toward merging or joining LYRASIS?

Kate Nevins: "The critically important thing for me was, when we started talking about the challenges and opportunities of the future, we immediately started thinking about partnership and collaboration. You know, it's in our DNA. When faced with a problem, we pick up the phone and talk to a colleague—so it's really a natural outgrowth."

Joe Lucia: "It seemed to me that it was going to be possible to do something significant quickly by taking the organizations that already existed and allowing them to gestate into something new… . I felt even if it was just to send a marketplace signal, it was really important for libraries collectively to take a stand on the principles and values of sharing and collaboration. It wasn't clear to me that OCLC was fully standing for this at this time."

Carol Pitts Diedrichs: "It became obvious pretty quickly for the Board that what they desired in a merger was a strong partner with complimentary strengths, so we looked at networks doing things differently and in different areas, so together we could be even more effective in the marketplace."

Arnold Hirshon: "There was great commonality in history and interests… . Of all the options we looked at, this provided the best opportunities to maintain local touch, which was very important to our Board members, and to continue to deliver the programs and services that our members valued."

W. Lee Hisle: "We felt an immediate affinity with our LYRASIS colleagues, with not only the challenges in front of us but also the opportunities and what this organization could mean to library communities in our area. It felt increasingly right as a direction for us."

Cathy Wilt: "It was part of the promise, the responsibility we have to help libraries go to the next place."

Forming a New Vision
We asked key participants about the process for forming the vision for a new organization. What was helpful to them to focus on? What kept them on the path?

Kate Nevins: "Joe Lucia challenged us not just to do more of the same, but to be something new… . Richard Madaus wouldn't let us use the word 'merger.' He said we are inventing a new organization. "

Carol Pitts Diedrichs: "One thing that really helped significantly was that we did a visioning session with PALINET *well before* we made the decision to merge. It wasn't just 'Let's merge because of economies of scale.' It was because we had invested in this vision of what this new organization would be. Having that key vision helped us through the rough spots that always come."

Cathy Wilt: "What was most important about the process was finding the points of consensus, keeping the family together—with the thought that later, we will expand our wings further and as one organization."

Richard Madaus: "When we would start to get bogged down in the kind of things it's real easy to get bogged down in, the phrases 'Think bigger' and 'We're thinking in the past' kept coming up."

Joe Lucia: "I was very strongly convinced that we needed to try to envision an organization that would look at where libraries were as social and cultural actors and where the technology was that helps us serve our users … and ask ourselves what would we do if we were starting from scratch now to build something that would help libraries prosper."

Benefits of the Merger, Expected and Unexpected

We asked key participants about both expected and unexpected benefits of the merger.

Cathy Wilt: "One of the unexpected benefits was just how much visibility and excitement the merger created throughout the profession. It was the hope of what is possible."

Kate Nevins: "The merger was not an end unto itself, but was more of an enabling action to address other concerns, create new capabilities and new programs, to extend our service reach and enfranchise libraries, to increase collaboration."

W. Lee Hisle: "One of the main benefits is the lower cost of membership for many libraries, while still providing them access to services they felt were most important. Lower costs and a more manageable environment were the two major benefits. "

Arnold Hirshon: "The benefits were the continuation of local touch through the live programming that our members valued. Members wanted to be able to pick up the phone and talk to people for support or consulting, and continuing to work with staff who they knew and respected."

Joe Lucia: "One of the really interesting immediate benefits is that, because of its national reach, LYRASIS can really be a locus for substantive conversations among library professionals … and a convener of communication for the library profession in a new independent environment."

Moving Forward
In the year since LYRASIS was formed, many other library networks and organizations have merged or are considering merger. Here are concluding remarks that may help others along the way.

Cathy Wilt: "It was exciting, hard work, rewarding, with moments of pain. They say in every merger, there are three heart attacks, and at each, the merger could fail. But we had an imperative, a responsibility

to help libraries go to the next place. It was a critical repositioning."

Kate Nevins: "We're still committed to the things our members held dear about service and collaboration and supporting each other, but now we're able to accomplish so much more and to bring services to members in ways we couldn't before… . In years to come, we're going to look back and say 'That was the year everything kicked up a notch.'"