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eResources: Getting Buy With a Little Help From Your Friends

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eResources: Getting Buy With a Little Help From Your Friends

Athena Hoepfner
University of Central Florida Libraries
athena@ucf.edu



*ALA 2013 Virtual Preconference
Hosted by ALCTS
Association for Library Collections & Technical Services*

Talk Overview

- ⦿ A Whirlwind Overview of Consortia
- ⦿ Particulars: UCF and Consortia
- ⦿ Consortia and the eResources Librarian

Polls
Questions

About Me

Not an Expert on Consortia

- ⦿ e-Resources Librarian 1999 – *forever*
- ⦿ e-Resources Subcommittee 1999 – 2012
 - Twice chair

Polls: About You

- ⦿ What is your role in your library?
- ⦿ What is your library type?

A Consortia Primer

- ⦿ Consortia types
- ⦿ Who they serve
- ⦿ Types of services
- ⦿ Role in eResources acquisitions

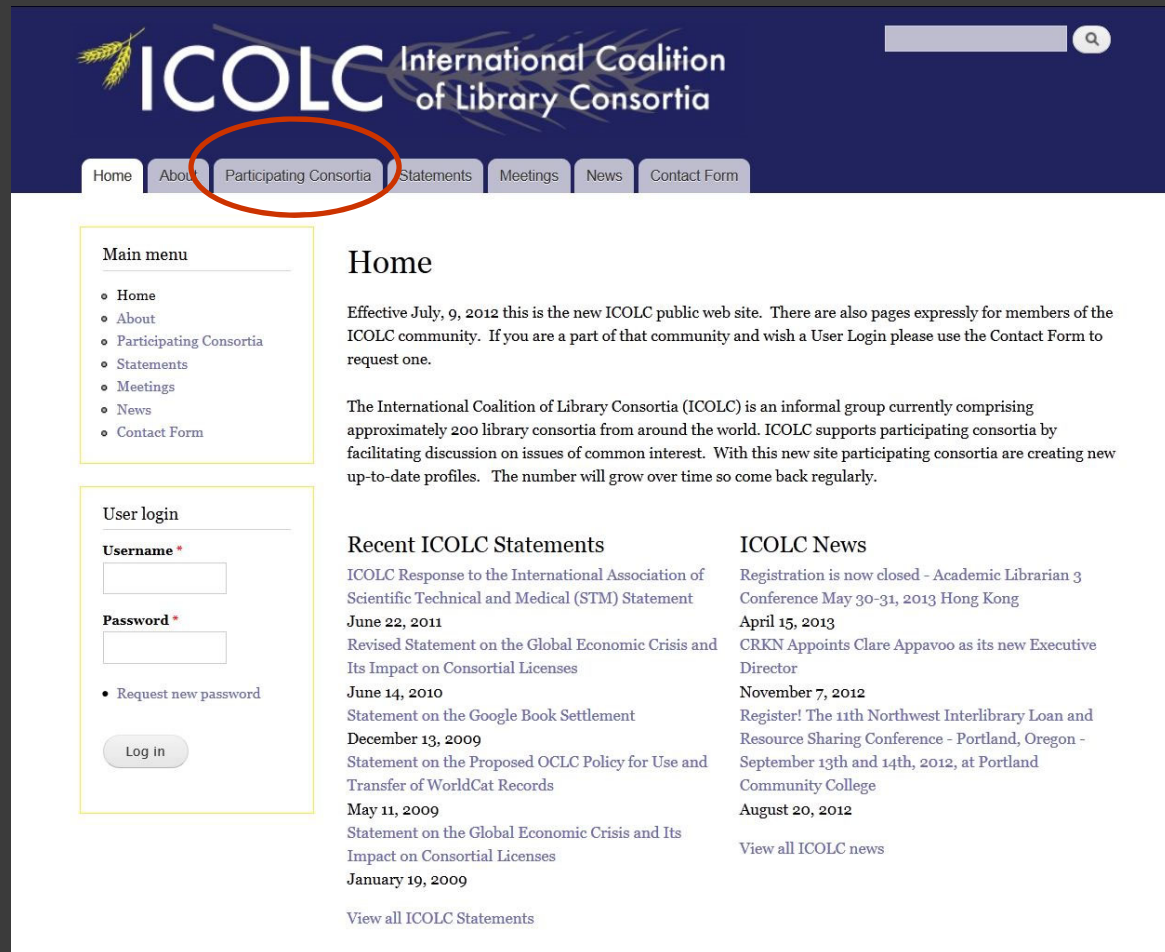
ICOLC

International Coalition of Library Consortia

“an informal group currently comprising approximately 200 library consortia from around the world. ICOLC supports participating consortia by facilitating discussion on issues of common interest.”

<http://icolc.net>

The ICOLC Directory



The screenshot shows the ICOLC website with a dark blue header. The logo features a stylized wheat stalk and the text 'ICOLC International Coalition of Library Consortia'. A search bar is in the top right. The navigation menu includes 'Home', 'About', 'Participating Consortia' (circled in red), 'Statements', 'Meetings', 'News', and 'Contact Form'. On the left, there is a 'Main menu' and a 'User login' section with fields for 'Username' and 'Password', a 'Log In' button, and a link for 'Request new password'. The main content area has a 'Home' section with a welcome message and a paragraph about the organization. Below this are two columns: 'Recent ICOLC Statements' and 'ICOLC News', each listing recent activities and dates.

ICOLC International Coalition of Library Consortia

Home About **Participating Consortia** Statements Meetings News Contact Form

Main menu

- Home
- About
- Participating Consortia
- Statements
- Meetings
- News
- Contact Form

User login

Username *

Password *

[Request new password](#)

Log In

Home

Effective July, 9, 2012 this is the new ICOLC public web site. There are also pages expressly for members of the ICOLC community. If you are a part of that community and wish a User Login please use the Contact Form to request one.

The International Coalition of Library Consortia (ICOLC) is an informal group currently comprising approximately 200 library consortia from around the world. ICOLC supports participating consortia by facilitating discussion on issues of common interest. With this new site participating consortia are creating new up-to-date profiles. The number will grow over time so come back regularly.

Recent ICOLC Statements

ICOLC Response to the International Association of Scientific Technical and Medical (STM) Statement
June 22, 2011
Revised Statement on the Global Economic Crisis and Its Impact on Consortial Licenses
June 14, 2010
Statement on the Google Book Settlement
December 13, 2009
Statement on the Proposed OCLC Policy for Use and Transfer of WorldCat Records
May 11, 2009
Statement on the Global Economic Crisis and Its Impact on Consortial Licenses
January 19, 2009

[View all ICOLC Statements](#)

ICOLC News

Registration is now closed - Academic Librarian 3 Conference May 30-31, 2013 Hong Kong
April 15, 2013
CRKN Appoints Clare Appavoo as its new Executive Director
November 7, 2012
Register! The 11th Northwest Interlibrary Loan and Resource Sharing Conference - Portland, Oregon - September 13th and 14th, 2012, at Portland Community College
August 20, 2012

[View all ICOLC news](#)

[Home](#)

Main menu

- [Home](#)
- [About](#)
- [Participating Consortia](#)
- [Statements](#)
- [Meetings](#)
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- [Contact Form](#)

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Username ***Password ***

- [Request new password](#)

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Participating Consortia

The following library consortia participating in ICOLC have chosen to complete a public profile of their organization.

Search for a word in the consortium name[Apply](#)

| Consortium Name | Abbreviation | Country |
|---|--------------|---------------|
| Abilene Library Consortium | ALC | United States |
| Academic Libraries of Indiana | ALI | United States |
| Adventist Library Information Cooperative | ALICE | Multi-country |
| Alerta al Conocimiento | Alerta | Chile |
| American International Consortium of Academic Libraries | AMICAL | Multi-country |
| American Theological Library Association | ATLA | United States |
| Amigos Library Services | Amigos | United States |
| ANATOLIAN UNIVERSITY LIBRARIES CONSORTIUM | ANKOS | Turkey |
| Appalachian College Association | ACA | United States |
| Arizona Health Information Network | AZHIN | United States |
| Arizona Universities Library Consortium | AULC | United States |
| ARKLink Library Consortium | ARKLink | United States |
| Association of Research Libraries | ARL | United States |
| Bayern-Konsortium | -- | Germany |
| BC Electronic Library Network | BC ELN | Canada |

[Home](#)

Main menu

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- [Participating Consortia](#)
- [Statements](#)
- [Meetings](#)
- [News](#)
- [Contact Form](#)

User login

Username ***Password ***

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Participating Consortia

The following library consortia participating in ICOLC have chosen to complete a public profile of their organization.

Search for a word in the consortium name

| Consortium Name ▲ | Abbreviation | Country |
|-------------------|--------------|---------------|
| LYRASIS | LYRASIS | United States |

Home

Main menu

- [Home](#)
- [About](#)
- [Participating Consortia](#)
- [Statements](#)
- [Meetings](#)
- [News](#)
- [Contact Form](#)

User login**Username *****Password ***

- [Request new password](#)

LYRASIS

Submitted by TomSanville on Tue, 2012-06-12 15:52

Consortial Abbreviation: LYRASIS**Consortium Website Address:** <http://www.lyrasis.org>**Slogan or Motto:**

Advancing Libraries Together

Brief Description:

LYRASIS partners with member libraries to create, access and manage information, while building and sustaining collaboration, enhancing library and technology operations, and increasing buying power. A non-profit membership organization, LYRASIS was established in April 2009 through the merger of PALINET (established in 1936 in Philadelphia and serving libraries in the Mid-Atlantic) and SOLINET (established in 1973 to serve libraries in the Southeast). In October 2009, LYRASIS joined by NELINET, a consortium serving libraries in New England. With the closure of BCR (Denver, CO) in 2010 and Nylink (Albany, NY) in 2011, LYRASIS has welcomed libraries from those legacy network service areas, among others, to its membership.

LYRASIS helps libraries operate more effectively by providing expanded access to valuable resources and professional expertise in content creation and management. With a collective history that dates back to 1936, LYRASIS continues its mission of supporting libraries and information professionals by offering creative solutions and increased savings opportunities.

Comprised of more than 1,600 members, and serving hundreds more through group arrangements, the diverse LYRASIS membership is located primarily in the Mid-Atlantic, Northeast, Southeast, and West regions of the U.S. While large in scale,

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LYRASIS is governed by a [Board of Trustees](#) that is elected by the membership.

Principal Consortial Functions: Collections sharing
Electronic content licensing
Interlibrary loan/document delivery
Preservation
Training

Other Functions:

-Open Source services (decision support, consulting, implementation, support, hosting) -Technology assessment, strategy, planning and implementation -Professional development courses covering a broad range of topics -Consulting services to address library needs across a wide range of subject areas -Mass Digitization Collaborative -Grant funding to support collaborative, technology, preservation and leadership initiatives, with current grants including -Ideas and Insights Series on hot and emerging topics -Networking opportunities that bring library professionals together -Training needs assessment and training plan development -Leadership development programs and classes

Mailing Address: LYRASIS 1438 West Peachtree Street NW Suite 200 Atlanta, GA 30309

Country: United States

Generic Phone Number: +01 404.892.0943

Fax: +01 404.892.7879

Staff Contacts:

VENDORS and LICENSING Tom Sanville Phone: 404.892.0943 x4873 tom.sanville@lyrasis.org

CONSORTIA and PROSPECTIVE MEMBERS Tim Cherubini Phone: 404.892.0943 x4992

timothy.cherubini@lyrasis.org MEMBER SUPPORT and SERVICES <http://www.lyrasis.org/Member-Support.aspx>

Number of Member Libraries (full or core members): 1 600

Number of Affiliate Member Libraries: 800

Types of Member Libraries: Academic

Public

Special

School

Other Types of Members: Libraries of all types including State Libraries and other consortia

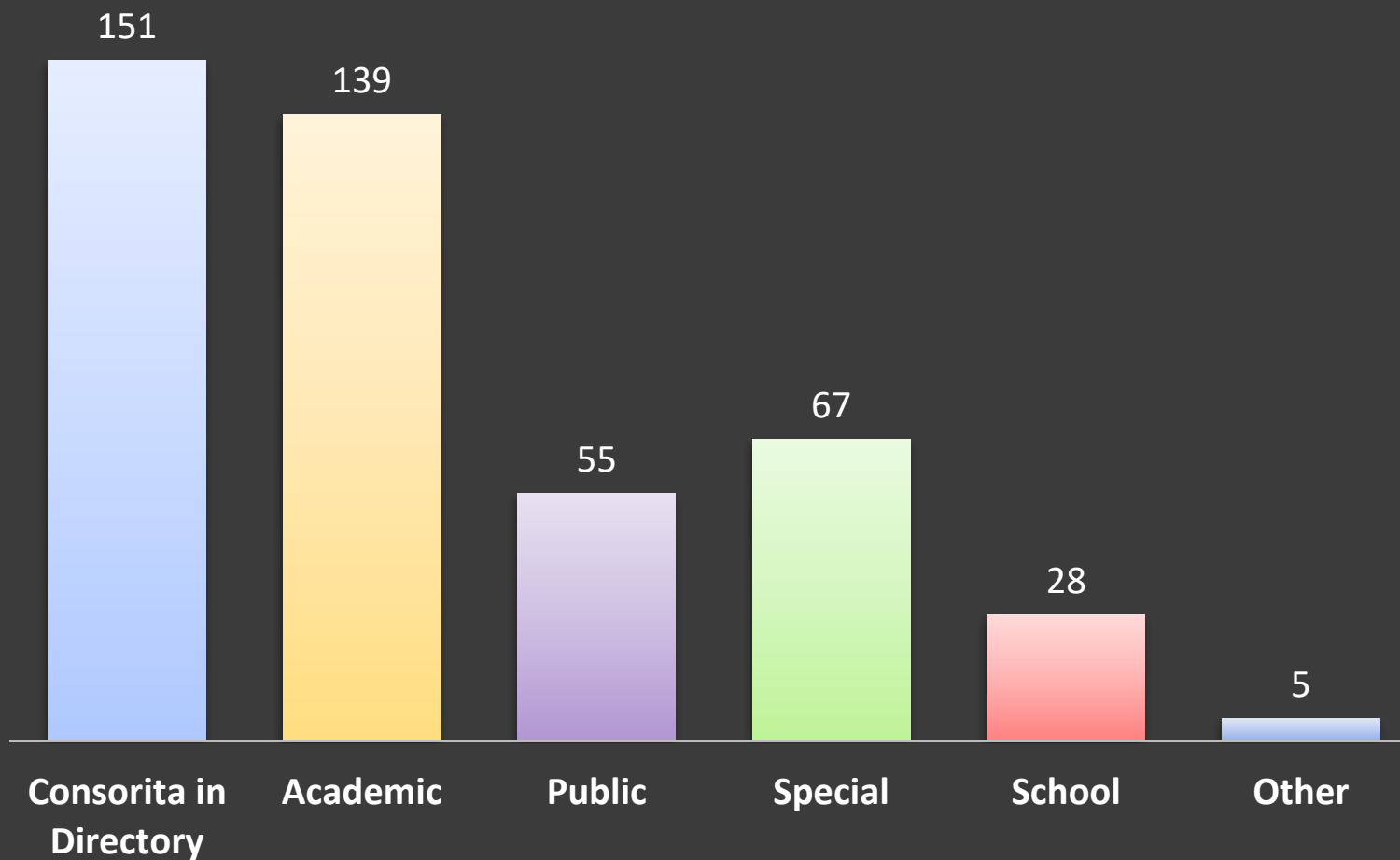
Number of Staff: 60.00

Legal Status: US 501(c) (3) non-profit membership organization

10 Largest Consortia

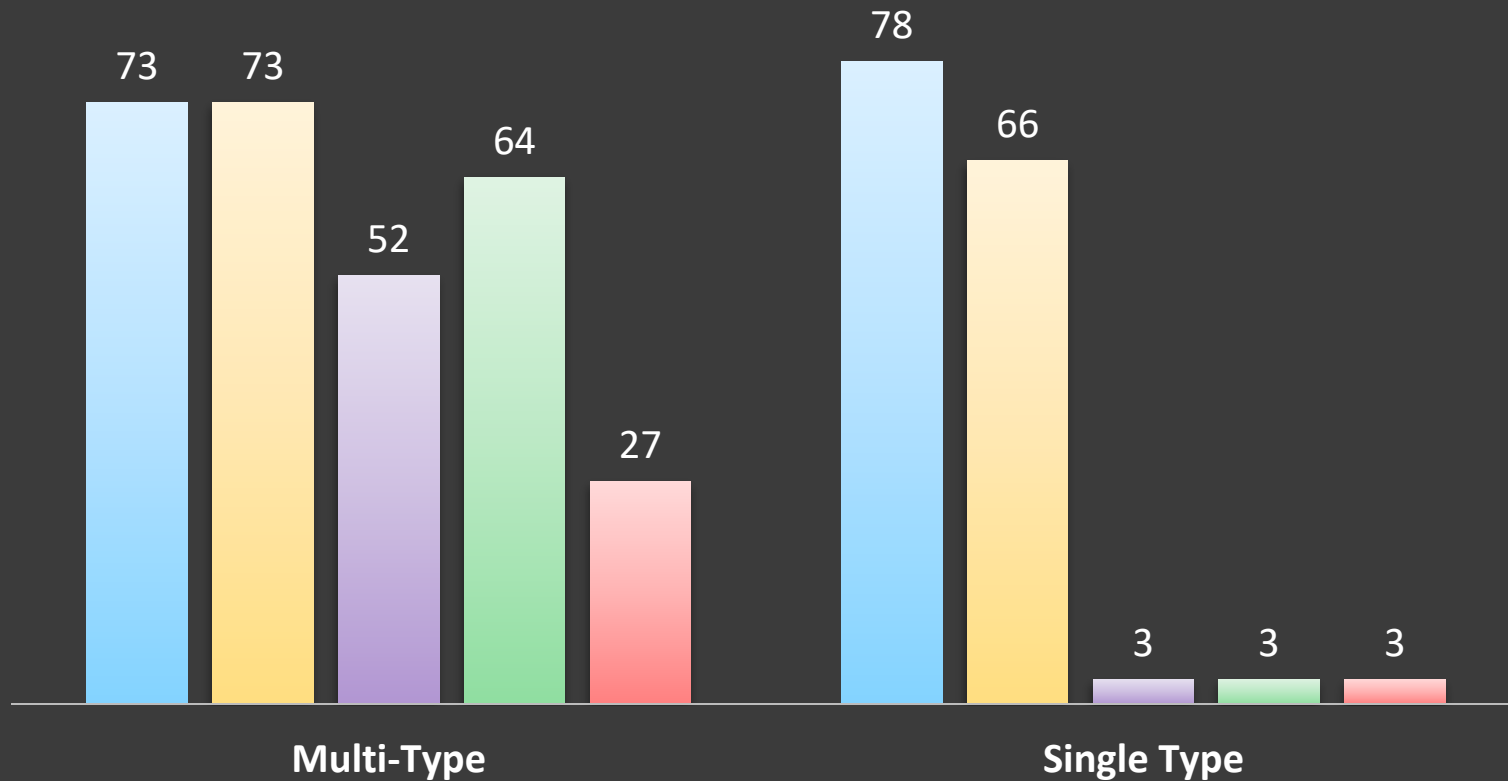
| Consortia | | Libraries | |
|-----------|---|-----------|------|
| 1. | <u>INFOhio</u> | USA | 2380 |
| 2. | <u>Minitex</u> | USA | 2160 |
| 3. | <u>Electronic Information for Libraries</u> | Italy | 2100 |
| 4. | <u>GALILEO</u> | USA | 2000 |
| 5. | <u>Massachusetts Library System</u> | USA | 1700 |
| 6. | <u>LYRASIS</u> | USA | 1600 |
| 7. | <u>Midwest Collaborative for Library Services</u> | USA | 1040 |
| 8. | <u>National Electronic Information Consortium</u> | Russia | 819 |
| 9. | <u>Amigos Library Services</u> | USA | 800 |
| 10. | <u>TexShare</u> | USA | 700 |

Library Types Served



Multi vs. Single Library Type

■ Total Consortia ■ Academic ■ Public ■ Special ■ School



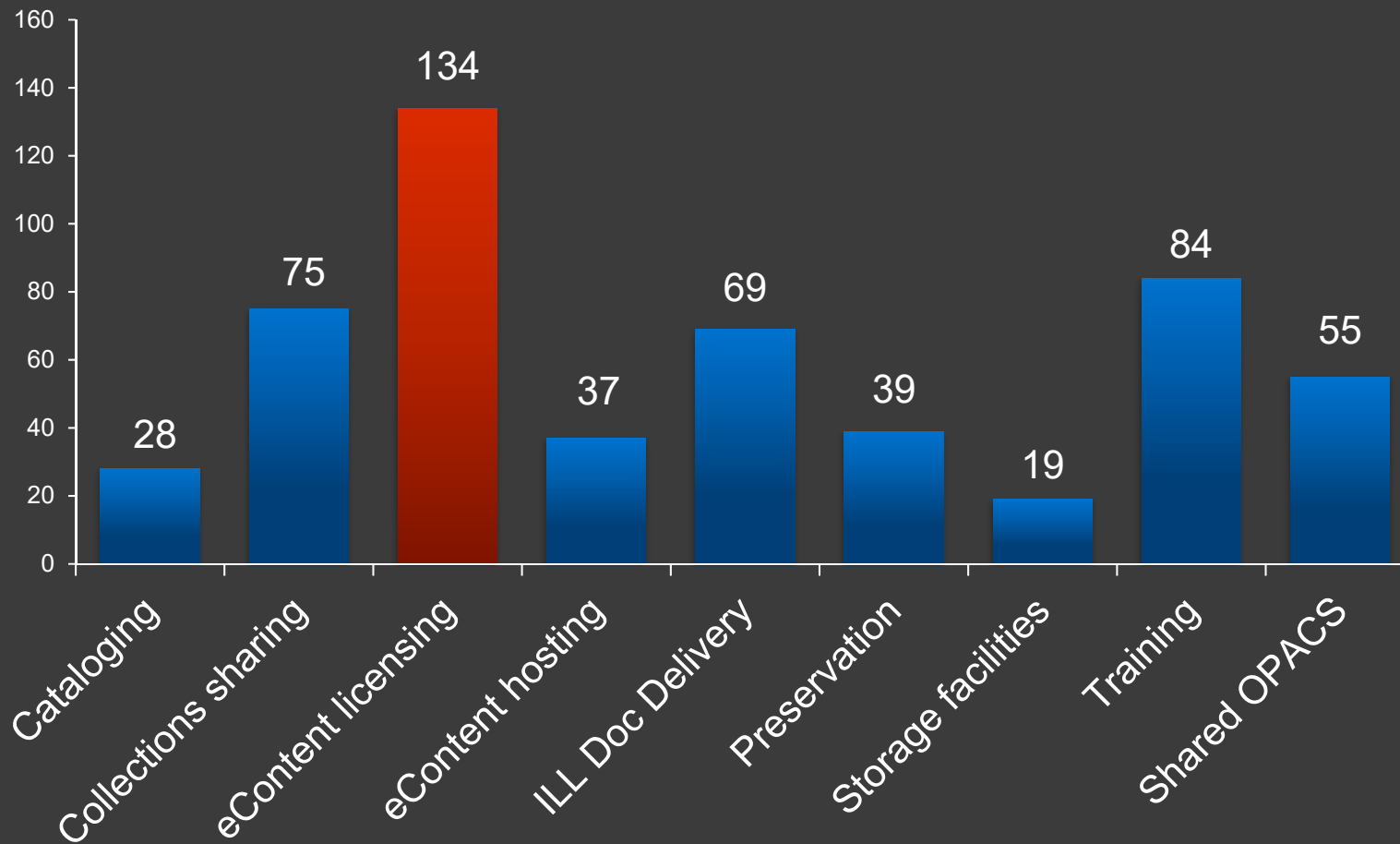
Consortia Services

As listed on ICOLC's directory of consortia:

| | | |
|---|---|------------|
| 1. | Electronic content licensing | 134 |
| 2. | Training | 84 |
| 3. | Collections sharing | 75 |
| 4. | Interlibrary loan/document delivery | 69 |
| 5. | Union lists/shared online catalogs | 55 |
| 6. | Preservation | 39 |
| 7. | Electronic content loading/presentation | 37 |
| 8. | Cataloging services | 28 |
| 9. | Storage facilities | 19 |
| Total Consortia in ICOLC Directory | | 151 |

- ⦿ *Polls: Does your library participate in consortia?*
- ⦿ *What consortia services does your library use?*

Services Consortia Provide



Electronic Content Licensing

Don't Miss the Savings - Spring Offers and Year-End Specials Ending Soon!

- Alexander Street Press - up to 45% off
- Ambrose Video - 30% to 38% additional discount
- Books24x7 - free video resources
- Bridgeman Education - 5% off
- CQ Press - 5% off
- Duke University Press - 25% off
- INTELECOM - 50% off
- McGraw Hill - 5% off
- Mosio Text a Librarian - no implementation fee
- National Geographic Virtual Library - 48% off (academic libraries only)
- Oxford University Press - 15% to 20% off
- Paratext - 10% off
- Statista - 25% to 50% off
- World Bank eLibrary - 5% to 40% off
- Vernon Library Supplies - savings on supplies

To take advantage of the special year-end discounts LYRASIS has negotiated just for our members, please contact your Member Support Specialist to place an order or request a quote.

Electronic Content ~~Licensing~~ *Everything*

- ◉ Coordinate content selection
- ◉ Negotiate good pricing
- ◉ Negotiate acceptable licensing terms
- ◉ Coordinate or handle invoice processing
- ◉ Coordinate fund transfers OR pay out of shared funding
- ◉ Communicate technical details to vendors (IPs, proxy etc.)
- ◉ Create access points
- ◉ Add branding
- ◉ Troubleshoot access problems
- ◉ Gather, evaluate, and report usage data
- ◉ Renew
- ◉ Host and preserve acquired eContent

Who's Gonna Pay?

Library Funded

- Opt-in
- No on-going coordination
- Not mandated

Consortia Funded

- Core shared collection
- Coordinated collection development
- Mandated by funding body

Both!

Questions?

UCF and Consortia

Key UCF facts (2012):

- FTE 38,000
- Budget \$6,450,000
- eJournals \$2,722,000
- Databases \$839,881
- eBooks plus \$852,852

UCF Participates in:

- ASERL
- CRL
- Lyrisis
- FLVC
- SUL Sub-consortia

Consortia Licensed eContent

- ⦿ Database subscriptions
- ⦿ eJournals
- ⦿ eBooks
- ⦿ Media collections
- ⦿ Digitized Collections
- ⦿ *Poll: What do you acquire via consortia?*

UCF and Opt-in Consortia

Consortia

UCF Spend

- ◎ ASERL

Identifies collaborative purchasing/
licensing agreements that bring benefit
ASERL libraries.

?

- ◎ CRL

Negotiates favorable terms for the
purchase of, or subscription to, major
electronic resources.

?

- ◎ Lyrasis

Increases access to a wide range of
content with better prices and terms.

\$25,000 +?

UCF, FCLA, and SULs

- ◎ FLVC (FCLA and CCLA)

FLVC funds e-resources for use by state schools, and provides centralized licensing services for SUL and FCS funded resources.

FCLA Spend

\$3,425,508

- ◎ SUL Sub-consortia

Acquires and manages journal collections funded by the State University Libraries (SUL's) under FCLA negotiated licenses.

UCF Spend

\$1,818,782

Key Facts About FCLA

| | |
|---|-------------|
| ● Inception | 1984 |
| ● Collection budget | \$3,425,508 |
| ● Collection Size | 190+ |
| ● Vendors in Collection | 17 |
| ● Universities Represented | 11 |
| FAMU FAU FGCU FIU FSU NCF UCF UF UNF USF UWF | |
| ● FTEs in Universities | 213,625 |
| ● Transitioned into FLVC | 2013 |

Key Facts About FLVC

| | |
|---|-------------|
| ● Inception | 2012 |
| ● Collection budget* | \$7,095,093 |
| ● Shared Collection Size | ? |
| ● Vendors in Collection | ? |
| ● Colleges and Universities Represented | 39 |
| ● FTEs | 585,676 |

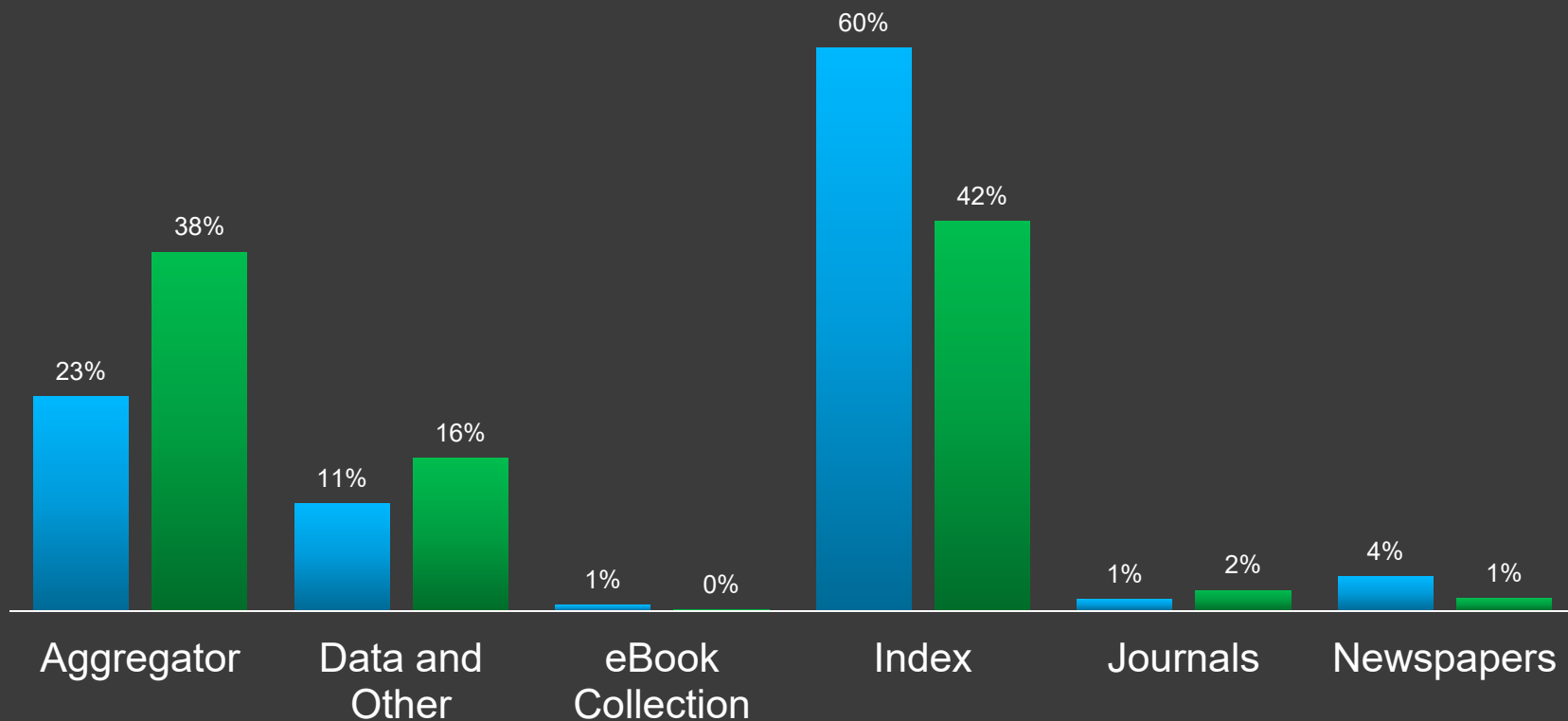
Deciding Together: A Tale of Change

First Incarnation: ECC

- Simple charge of selecting, renewing eResources funded by state allocation
- Renewals fun with dots and super dots
- One member per library
- One voting member per institution
- Monthly conference calls and once a year meeting
- Established channels of communication, procedures for cooperation, norms for distributing costs
- Led to Sub-consortial journal and database deals negotiated by ECC members

FCLA Collection

■ % of eResource Title Count ■ % of 2010 Spend



Deciding Together More

Second Incarnation: CPC and ERS

- ⦿ Coordinating print and electronic resources
- ⦿ ERS managed the FCLA funded collection and informed the journal deals
- ⦿ One member per library
- ⦿ One voting member per institution
- ⦿ Monthly conference calls and once a year meeting
- ⦿ Lead to JANUS Task Forces, eBook deals, shared storage facilities and more

FLVC is Born

FLORIDA VIRTUAL CAMPUS E-resources for FY 2012-13

Total FLVC E-resource legislative appropriation = \$7,095,093
Total FLVC E-resource expenditure for FY 2012-13 = \$7,083,612

Florida College System

- | | |
|-------------------------------------|---------------------------------------|
| 1. EBSCO Publishing | 9. Syndetics |
| 2. Gale Cengage Learning | 10. SAGE Journal Package |
| 3. ProQuest | 11. Congressional Quarterly |
| 4. Newsbank | 12. Truven (formerly Thomson) |
| 5. JSTOR | 13. Facts on File |
| 6. Oxford University Press | 14. Columbia University Press |
| 7. Mergent (now supporting Hoovers) | 15. Springer Journal Package |
| 8. ARTstor | 16. Physicians' Desk Reference (PDR3) |

2012-2013 legislative appropriation for colleges = \$3,669,585

Total cost of renewal for current portfolio = \$3,668,484

Renewal difference = \$1,101

Renewal includes Springer and SAGE journal packages (participating on university licenses)

State University System

- | | |
|---------------------------------------|---|
| 1. ProQuest | 10. Association for Computing Machinery (ACM) |
| 2. EBSCO Publishing | 11. SAGE |
| 3. Elsevier | 12. De Gruyter |
| 4. LexisNexis | 13. Baker and Taylor |
| 5. Gale Cengage Learning | 14. MARCIVE |
| 6. American Psychological Association | 15. Peter D. Ward, Inc. |
| 7. Oxford University Press | 16. OCLC |
| 8. Standard & Poor's | 17. Cambridge Books Online |
| 9. Value Line | |

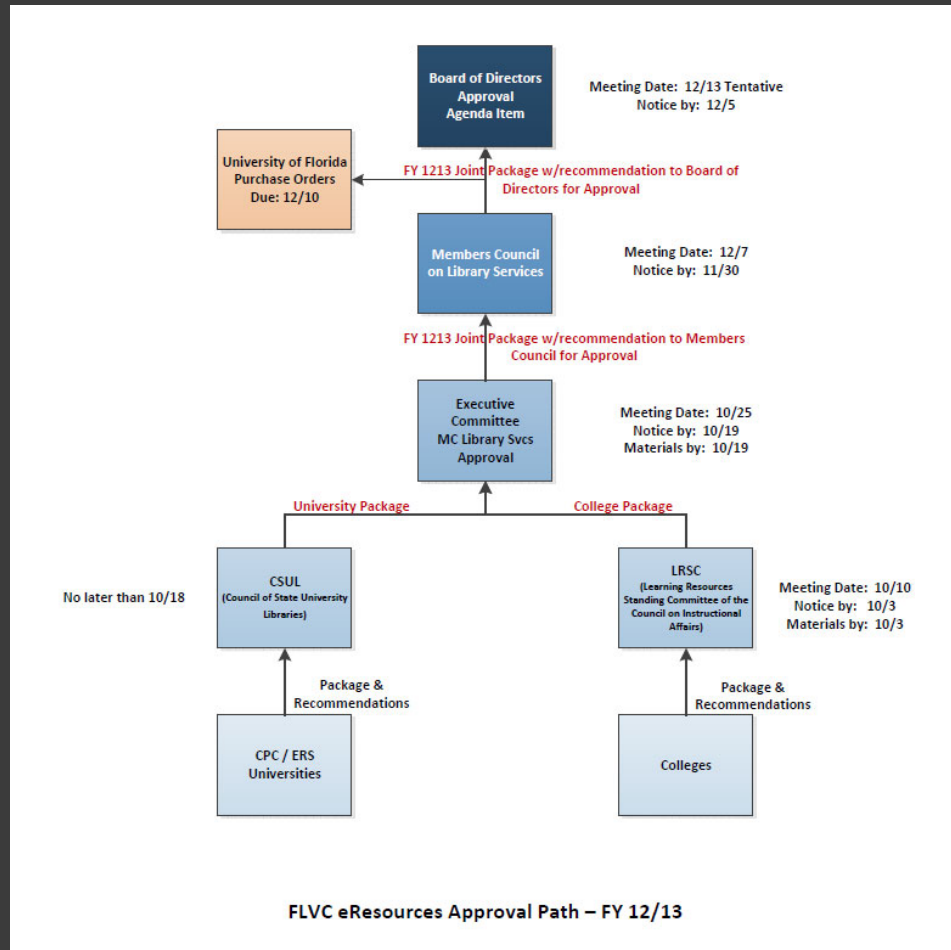
2012-2013 legislative appropriation for universities = \$3,425,508

Total cost of renewal for current portfolio = \$3,415,128

Renewal difference = \$10,380

Expenditure includes one-time purchase of enriched MARC records from Baker and Taylor.

Deciding in Parallel



FLVC: New Consortia, New Process, New Challenges

Third Incarnation: Collection Management and E-Resources Committee

- ⦿ 10 members: 5 university, 5 college
- ⦿ Represents 39 member institutions
- ⦿ Tasked to merge two disparate collections
- ⦿ Relies on surveys, scheduled decision timelines
- ⦿ Much in flux

FLVC: Much More than eResources

Project updates from a recent FLVC meeting:

1. Discovery Tool Selection
2. Primo v. 4
3. ILS consolidation / Next-gen Integrated Library System
4. Help Desk Consolidation
5. Data Loading
6. E-Resources Consolidation
7. SFX/MetaLib Consolidation
8. Florida Academic Repository (FLARE)
9. Islandora

Recommendations for a Common Statewide Core of Electronic Resources

A Report from the Collections / E-Resources Licensing Task Force

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Wait, wait! We still have more to decide!

Fourth Iteration: **Collections Advisory Committee**

- ◉ Coordinating shared print and electronic resources funded by the SULs
- ◉ One member per library
- ◉ One voting member per institution
- ◉ Monthly conference calls
- ◉ Pursuing PDA, eJournal renewals, shared storage
- ◉ Maintaining channels of communication and cooperation

Deciding at the Highest Levels

Transcending Incarnation: Library Deans and Directors

- ⦿ All incarnations *recommend* acquisitions
- ⦿ The Deans and Directors usually approved recommendations
- ⦿ Take a hands-on approach occasionally
- ⦿ Big eJournal deals were BIG!
- ⦿ Deans and Directors opted to directly handle the Elsevier Science Direct renewal negotiation

Provosts, Too

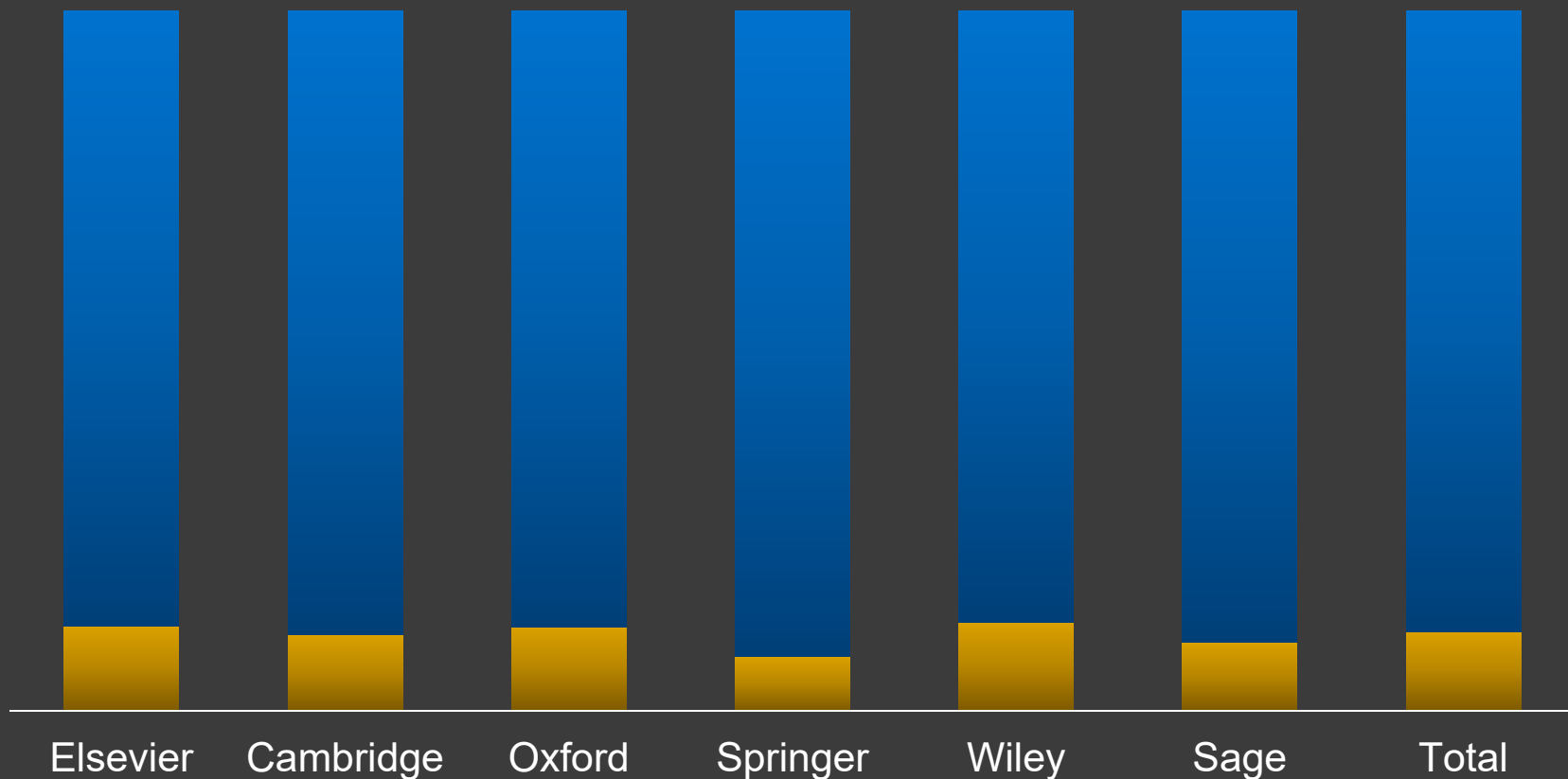
- ⦿ Big eJournal deal pricing rooted in the past

What's the Big Deal?

- UCF spend \$1,818,800
- SUL spend \$14,367,201
- Access and rights to over 6500 titles
- UCF has 17% of the SUL FTE
- UCF pays about 13% of the SUL total
- UCF pays less than other large SULs
- Shared collections hinder flexibility and local collection decisions

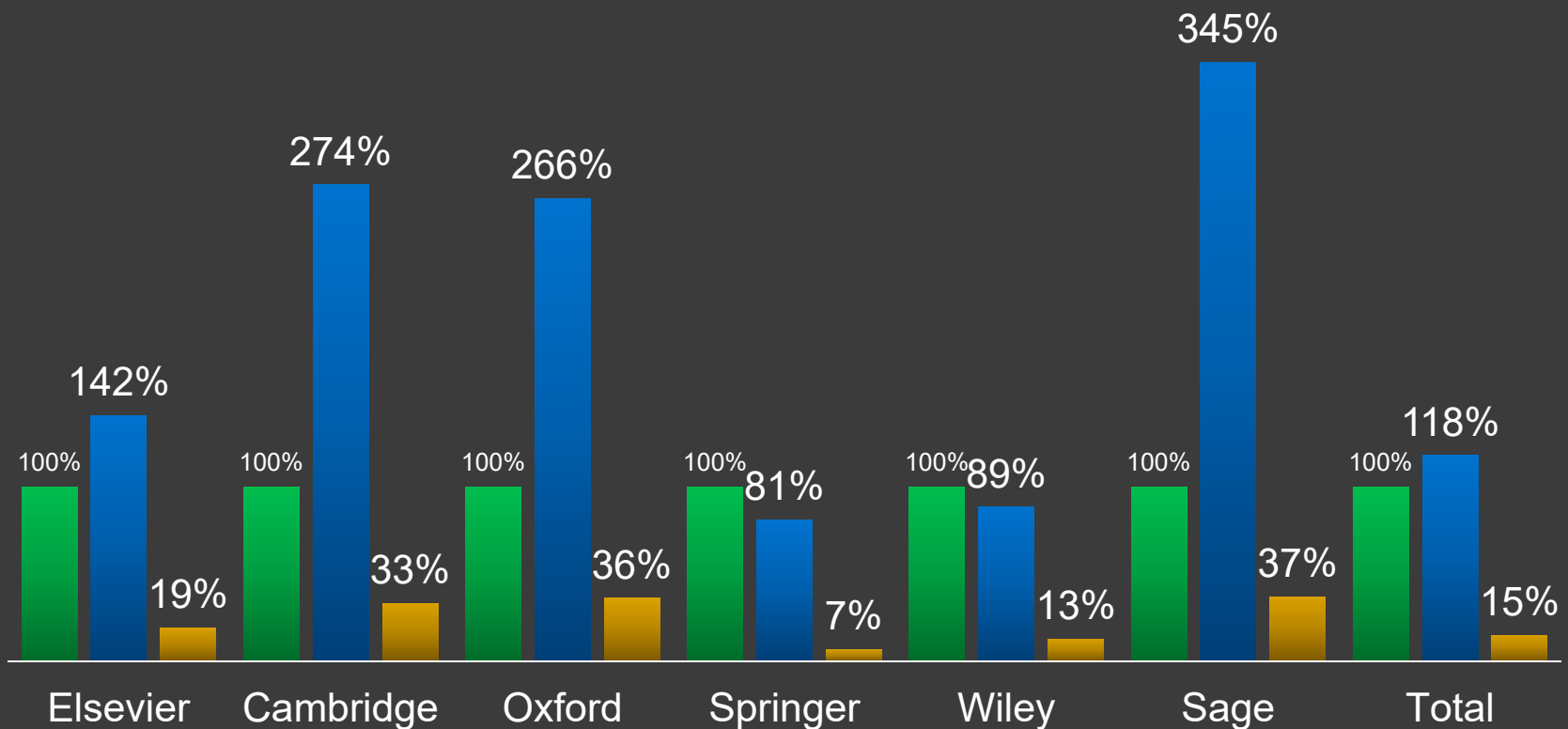
UCF Spend as % of SUL Spend for Package

■ UCF 2013 Spend ■ SUL Spend

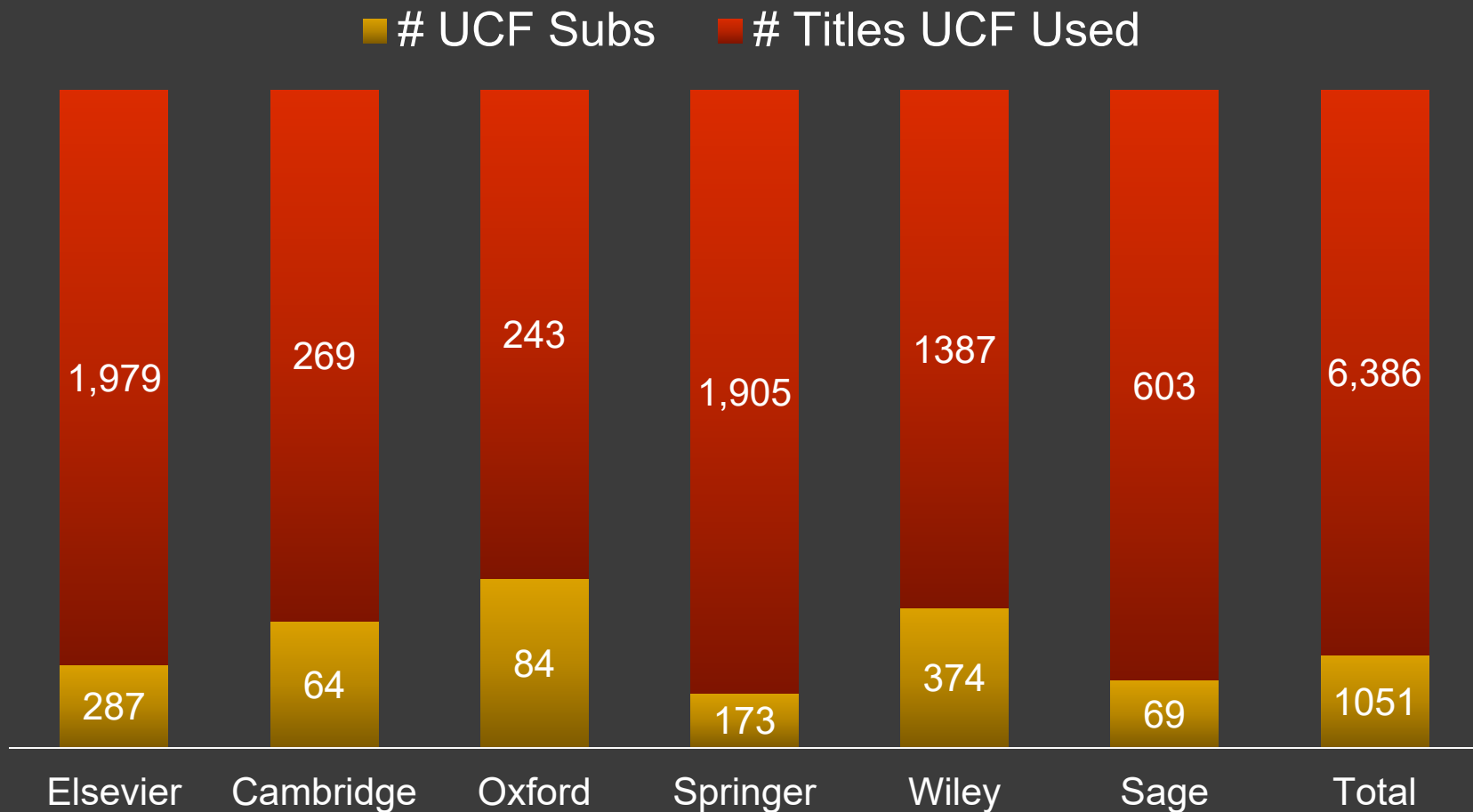


List Price and Spending on Journal Packages

■ Sum of List Price ■ SUL Spend ■ UCF Spend

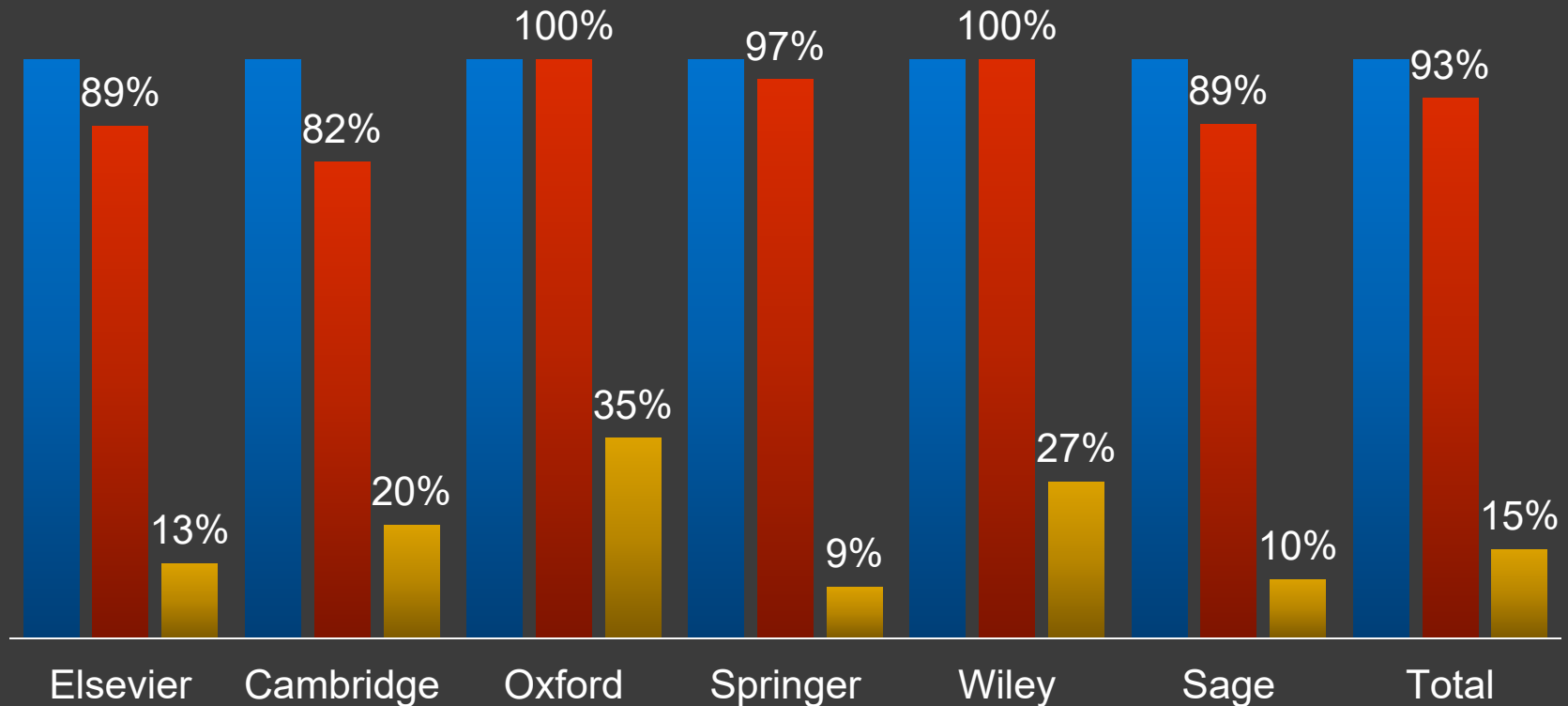


Usage: Strong and Inclusive



UCF Title Use and Subs as % of Package

■ Total in Package ■ Titles UCF Used ■ UCF Subs



eBooks Deal Fits and Starts

- ◉ NetLibrary Shared Collections 60,000
 - Opt-in offer from Solinet
 - Price and number of titles depended on number of libraries participating
 - 1 simultaneous user per title
 - Strict DRM
 - Titles selected based on votes of participating libraries
 - Purchased by EBSCO
- ◉ GVRL Titles for FCLA 60
 - Funded via a credit from Gale to FCLA
 - Titles selected by vote of ECC members
 - Unlimited simultaneous users
- ◉ CBO Psychology 313
 - Funded with FCLA remaining budget after renewals
 - Subject collection selected based WorldCat Collection Analysis Project
 - Unlimited simultaneous users

eBook Deals: Still Trying

- ◎ ASERL EBL via YBP 1180
 - 1st purchasing library paid full list price
 - Any other purchase within 18 months at 40% deep discount
 - Surprisingly low titles duplicate purchased
 - No coordinated information about selected titles
 - Current deal: 2% discount of list
- ◎ Working on Coutts PDA 3,500
 - 24 publishers
 - Broad academic subject coverage
 - Unlimited simultaneous users

Questions?

Consortia and the eResources Librarian

Consortial purchases touch on most aspects of my work

- Collection decisions
- Licensing
- Usage Statistics
- Access (Linking, OpenURL, MARC)
- Troubleshooting
- Branding

Negotiating Local Licenses

The Good

- ⦿ The library may be able to add local content and use the consortia's existing license

BUT...

- ⦿ Local administrations may not recognize the consortia as a signatory authority for the institution
- ⦿ Libraries need to provide copies of consortia licenses when adding new local content
- ⦿ Negotiated terms may be inconsistent with locally negotiated terms

Local Collection and Acquisitions

The Good

- ⦿ Consortia provides significant subscription content

But...

- ⦿ The library may prefer a different platform
- ⦿ The library may prefer a different agent
- ⦿ The content may overlap with local subscriptions that can't be dropped
- ⦿ The library may need to be prepared to pick up must-have content if consortia changes

Comparing Statistics

The Good

- ⦿ Consortia promote sharing data
- ⦿ COUNTER provides standard usage reports
- ⦿ SUSI provides standard usage gathering
- ⦿ Consortia may gather stats for members

BUT...

- ⦿ Stats are easily affected by WSD, Federated Search, Link Placement and Order
- ⦿ Locally owned content may be hard to sort out
- ⦿ Particulars of downloading stats can and annoying variance

All Tangled Up

- ⦿ Disagreements about what to buy
- ⦿ About platforms
- ⦿ About subscription periods
- ⦿ About decision processes and timing
- ⦿ About confidentiality
- ⦿ Complicated structures
- ⦿ Library representation (Does size matter? Number or specialization of libraries)
- ⦿ Mission creep
- ⦿ Mission revision
- ⦿ Mergers
- ⦿ Mission misalignment
- ⦿ Can consortia be too large to succeed?

UCF ❤️s FCLA

“Licensing state-wide resources centrally through FCLA resulted in a cost-avoidance of approximately 53% over what the SUS libraries would pay if subscribing individually at list price.”

- FCLA Cost Avoidance Report, 2011.

What Makes for Good Consortia

- ⦿ Closely aligned missions and collection needs
- ⦿ Coordinated channels of communication
- ⦿ Authority to negotiate on your behalf
- ⦿ Acceptable method to distribute costs
- ⦿ Fair representation for members
- ⦿ Acceptable method to make collection decisions
- ⦿ Stable and predictable funding for a shared collection

What Makes for a Good Member Library? Involvement and Support

We like:

- *Members who contribute to our meetings and respond to our consultations*
- *Members who support our negotiations with publishers*

Strong Member Relationships

Build strong personal relationships with colleagues. Encourage new colleagues to make a difference and help the consortium change over time. Encourage bold action.

Accurate Institutional Information

Keep your institutional profile (IPs, FTE, contacts, e-mails, staff lists, URL, etc.) updated. We're only as good as our data!

Sharing Solutions

One that contributes to conversations with solutions, not just complaints.

Responsive Communication

A good member library is one that responds to emails in a very timely manner – within 24 hours to say they received the mail and confirm/pass or will get back to me.

Partnership with Consortia

Identify one group as your default home consortium and seek to maintain and enhance long-standing partnerships rather than shopping around.

Reliance on Consortia

*Keep us top-of-mind when you are considering
a new e-resource acquisition.*

Realistic Expectations

Also, but perhaps more controversially ... members who are realistic about what is achievable! In the case of content they cannot walk away from - there is only so far we can go.”

Prompt Payment

And naturally, one that pays on time.

To Learn More About Consortia...

- ICOLC <http://icolc.net>

Papers to read

- **Bowell, Daniel J. 1. "A Case for Vibrant Library Consortia and for the Academic Libraries of Indiana (ALI): As Much and More."** *Indiana Libraries* 31, no. 1 (01, 2012): 41-45.
- **Chadwell, Faye A. "Assessing the Value of Academic Library Consortia."** *Journal of Library Administration* 51, no. 7 (Oct, 2011): 645-661.
doi:10.1080/01930826.2011.601268.
- **Guzzy, Judith E. "U.S. Academic Library Consortia: A Review."** *Community & Junior College Libraries* 16, no. 3 (01/01, 2010): 162-184
- **Huwe, Terence, K. "Web-Scale Library Consortia Lead the Way."** *Computers in Libraries* 32, no. 4 (05, 2012): 26-28.
- **Kaufman, Paula1. "Let's Get Cozy: Evolving Collaborations in the 21st Century."** *Journal of Library Administration* 52, no. 1 (01, 2012): 53-69.
doi:10.1080/01930826.2011.629962.
- **Perry, Katherine A. "Where are Library Consortia Going? Results of a 2009 Survey."** *Serials* 22, no. 2 (07, 2009): 122-130..

Questions?