

Electronic Resources Open Call Feedback Notes

Notes from two open calls: February 12 and 13, 2015.

Presenters: Kathi Fountain and Margarita Wickham

I. **Intro. ER staff introduction.**

- A. Kathi is the manager of the ER Program and handles new offers.
- B. Margarita handles current subscriptions.
- C. Debi handles billing, such as invoices and PO creation.

II. **Outline.** Kathi described scope of session.

III. **ER Deadline Calendar.** Margarita introduced [new deadline calendar](#). while Kathi demonstrated where to find it on the Alliance website. Text:

“Greg had a page on our main website called Deadline Reminders listing the ER products out for review with their response deadline listed. I have turned that webpage into a public Google Calendar called Orbis Cascade Alliance Electronic Resource Deadlines. It contains both new offers and current subscriptions. You can import it to your own calendar if you have a Google account, or check the webpage periodically if you have forgotten when a product’s response deadline is.”

IV. **Renewals.** Margarita directed questions to the general audience and to non-members.

A. *Is two weeks long enough for libraries to respond to deadline reminders?*

- 1. **General response.** For most renewals, this is fine. For complicated resources (journals, large databases), more discussion time is required for libraries.
- 2. **ER department limitations.** Vendors may provide pricing late and two weeks is all we can provide to subscribers. Those anticipating that they would like a quote for a particular resource are advised to ask for this well ahead of the renewal deadline. Most often, vendors can provide an estimate. Sometimes, no pricing is available until a few months prior to the deadline.
- 3. **Ballpark estimate.** We are unable to provide ballpark estimates before getting pricing from vendors.

4. **Mid-year additions.** Those wishing to add products mid-year are welcome to send a request to Margarita for a quote. You may also ask for a trial to see if the resource is useful.
 5. **Title list.** It may be possible to ask for Excel title lists for resources from vendors when we ask for pricing. We will look into this and include information regarding title lists in the response request email. We also plan on including a link to current subscription summaries on the Alliance website.
 6. **Email subject line.** For the time being, we will continue sending renewal reminders via email from the eresources@orbiscasade.org address. You may need to add this to your “safe email” list in your email preferences so that it is not sent to your spam folder. We will work on standardizing our email subject lines to alert libraries if it is regarding a renewal or new offer.
 7. **Library participation.** You can always find the list of libraries participating in a current subscription on the Alliance website.
- B. *Do you find the online subscription summaries useful?*
1. **General response.** Yes.
 2. **Confidentiality.** The issue of confidentiality of pricing and participation was raised. It is possible to password-protect the subscription pricing, but non-members also need to access this information. Also, if it is secured by administrative username/password, the page becomes difficult to share with other library staff. Kathi and Margarita are currently discussing this. We need to consider the duplication of documentation on Alma, but there are also limits to Alma’s functionality in this area.
 3. **Detail/depth of description.** Some attendees said that they heavily rely on the summaries, and others said they rely on their internal ERM team to advise them on content. If someone wants more information than what is provided on the summary webpage, such as breakdown of prices per library, feel free to ask Margarita. Currently we are not listing price per library in the summaries, but we may do that in the future in a separate document that is password protected.

4. **Central licenses.** We will look into linking existing central licenses on the website to the subscription summaries.
5. **Title lists.** It is possible to upload title lists in Excel or other format to the website, and link this to the subscription summaries. Some licenses (such as the recent ACS one) contain a clause stating that the Licensor is required to furnish a full title list upon request in a format suitable for the Grantee/Licensee. If you have your own license directly with the vendor, you should be able to request this directly. Be advised that there are many resources, and it will take time update the website if we choose to modify it in the ways attendees have request.
6. **Primo accessibility, etc.** It is beyond the capability of Kathi and Margarita to examine each resource and title within packages to see if they are discoverable via Primo, to examine their MARC records, etc. Margarita is considering the possibility of identifying the corresponding CZ collection and adding this to the subscription summaries, but she needs to weigh this additional work with the need to complete existing and upcoming orders. This may turn out to be an “as time allows” project.
7. **One cycle to rule them all.** It is not feasible for Margarita to move 150 subscriptions to a single renewal cycle. The reasons behind this are manifold. The workload would be tremendous at a single time during the year, and the orders can only go out as fast as our team can complete them.
8. *Non-members - What are your thoughts on updating your contact information?*
 1. **General response.** It doesn't matter - whichever method that is most useful to Margarita.
 2. **Web form.** We will consider adding a web form to fill in non-member contact information.
 3. **FTE calculation.** Many attendees expressed confusion over how we calculate FTE, which is why some schools have not responded. Greg calculated FTE as follows:

*“Student FTE numbers are reported to database providers for pricing purposes. The numbers are the **average** of Fall 2013 through Spring 2014 terms. Community college FTE is based on the officially reported count of students enrolled in credit courses (professional, technical, or equivalent to courses offered by a four-year institution).” This would get us the information that would be used in FY16. FY 17 numbers will be based on the following year’s enrollment. The information for the current year is not available in time for our needs. **For materials budget, the current year’s numbers are used since those are generally released by September / October.***

V. ER Deposit Accounts. Kathi asked questions for Debi, who was absent.

A. *For those who are non-members: is it worthwhile to set up an ER Deposit account to save some money?*

1. **General response:** No. It is difficult to use. It may not be allowed by the home institution. Some want to see information to see if it could be useful.

B. *We have folks with ER Deposit Accounts. Would it be helpful to have a survey to let us know how this is working for you or to make any suggestions?*

1. **General response.** It is not useful and most are not interested in deposit accounts at all.

2. **Library limitations.** Library business policies often prohibit the use of deposit accounts, and past experiences with Alliance deposit accounts did not prove successful.

3. **OHSU** has found the deposit account very useful but would like to see a few changes. This was the only positive response.

C. **Common sentiment about ER Deposit Accounts.** Rules for payment by home institution would prevent them from doing this. For members, it would not save them money.

VI. Offers. Kathi discussed the methods of offering out new products for subscription

A. *Should we continue Greg’s past practice of soliciting pricing for new products?*

Method: A library would say they were interested in a product, feedback about interest would be solicited, and if there was enough interest, Greg would inquire about pricing. **General response.** Continue this pattern.

- B. **Information that helps determine whether to subscribe.** Title lists, information on who else subscribes, pricing, feedback from current subscribers, information on how records could be managed. Offering webinars or other information sessions could be useful.

VII. EBSCO. Kathi asked if anyone had opinions on the current issues with EBSCO resource discoverability.

- A. **General Response.** Libraries cannot afford to drop the EBSCO because it provides resources that are unavailable elsewhere.
- B. Some responders said they had no concern over this issue. Others simply want the two parties to come to agreement.
- C. The general sentiment is that libraries will not be boycotting EBSCO en masse anytime soon.

VII. Topics from Member Libraries' Staff

- A. **Invoice payment deadlines.** They would like to change from a 15 day to a 30-day deadline. *Debi's response: We originally had 30-day deadlines. We had MASSIVE late payments (an average of 45 days) which required us to move to the 15-day net. We still get late payments (60 days past invoice date) and it is rare for us to have payments that meet the 15-day net. We have been able to make more timely payments to vendors since making this change. We still have a number of institutions who do not pay even within 30 days and even a few who go beyond the 60-days. Only non-members incur a late fee, which begins at 60 days past-due.*
- B. **In-person meetings.** Attendees would like a chance to talk with one another like they did when the Alliance had an E-Resources Committee and all-day representative meetings. Fold topics into Shared Content Team representatives meetings (expected annually)? Host open conversations online? We will explore our options and report back.
- C. **The future of ER and Alma.** The group had a discussion about the extent to which the Alliance staff could use Alma to help facilitate ER work. Kathi mentioned that there is a COE initiative to explore "collection development and joint acquisitions" with Ex Libris to exploit the NZ. Kathi is looking for volunteers to help work on that project. Suggestions for ways Alma could be use in e-resources work included:

1. Post and describe licenses in the NZ
 2. Create NZ information that allows libraries to start trial workflow
 3. Communicate orders from institutions to the Alliance (i.e., CZ collection name)
 4. Provide info on record options for products
- D. **Request for annual orientation session.** The Alliance ER staff should host an orientation session to the program each year, covering the mechanics of working with the program, so that new staff will understand immediately how their organization relates to the ER Program. We will make plans to do this.
- E. **Licenses.** The Alliance does not use a model license when working with vendors. We review some standard terms, then seek member feedback. Suggestion: either use a model license or agree to most important elements to fight for in license negotiations.
- F. **Alliance webpage improvements.** Several attendees expressed the desire for the following changes in the website:
1. **ER summaries.**
 - a. Provide more information in the Title/Description section, including (if possible) links to title lists
 - b. Links to relevant central licenses
 - c. Perhaps protect the page via administrative username/password
 - d. List other vendors that provide the same resource
 - e. Create summaries for journal packages not currently represented on the site
 2. **Contact information updates.** Provide an online form to fill in library contact information, IP address ranges, FTE, etc for non-members.
 3. **FAQ page.** Many expressed the desire for an FAQ page, containing information on Alliance policies, ER processes, etc. that would be of especial help for training and assisting the influx of new hires.
- G. **Savings spreadsheets.** Several attendees expressed the desire to have their list of subscriptions with or without product savings.
1. Margarita continuously updates spreadsheets for total Alliance ER savings and school-specific savings with savings listed per title. The latter worksheet also includes a list of past subscriptions that were canceled. You

may also request an explanation of savings calculations. Margarita is currently working on a document explaining savings calculations procedures and has developed several algebraic equations she has implemented with 2015 renewals. These equations can be provided upon request.

2. These spreadsheets historically have been given by Greg to the Alliance board and/or library deans.

3. Several attendees would like to have these savings sheets sent annually in May, before the start of the July-June fiscal year. They said that the savings sheets would be useful for planning their budgets.