**EAR COMMITTEE 2016/2017**

**YEAR END REPORT**

**May 19, 2017**

**Committee:**

LaurelBliss (SDSU), Amanda Grombly (CSUB), Naomi Moy (CSUDH), Kimberley Smith (CSUFr), Mark Stover (Vice-Chair, CSUN), Tim Strawn (SLO), Amy Wallace (Chair, CSUCI), Jennifer Ware (CSUSac), George Wrenn (CSUH).

**Meetings:**

All meeting virtual dates were sent out in August 2016 to both members as well as the CSUcdlist and the earmemolist. The meetings dates were selected via doodle poll with a guideline of 2-3 weeks prior to each COLD EC meeting. The group met virtually on August 26, October 14, January 26, and April 25. The meetings usually had about 15-20 plus people in attendance. The group also met in-person on March 8, 2017 in conjunction with SCELC Vendor Day. The timing was well received by members in both the north and the south because it allowed them to attend both events in one trip. 19 people were in attendance and it allowed a lively discussion on vendor issues to pursue and potential products to consider. The larger group asked EAR to consider the same in-person meeting arrangement next year.

**Initiative 1: Long Range Electronic Resource Planning**

**Committee:** EAR Committee plus Collection Developers from across CSU.

**Charge:** Provide COLD with a long-term ECC budget plan, prioritizes and prices new additions, prioritizes and prices eliminations, calendars renewal timelines, and projects budget increases. Provide COLD with a long-term journals budget plan, prioritizes and prices new additions, prioritizes and prices eliminations, calendars renewal timelines, and projects budget increases. Provide COLD with a long-term one-time purchase (so things are there as needs for back issues, springer book catalogs, UC book catalogs, etc.) budget plan, prioritizes and prices new additions, prioritizes and prices eliminations, calendars renewal timelines, and projects budget increases. Reference works as core and coverage needed.

**Result (See Attached)**: EAR 5 YR Budget Recommendation Plan

**Initiative 2: Electronic Resources – Analytics**

**Committee:** Perruso (Long Beach)Smith (Fresno), Strawn (SLO), Ware (Sacramento), and Wrenn (Chair, Humboldt)

**Charge:** Provide COLD with and executive summary of on the state of out analytics for collective and individual decision making on electronic resources.  Plus any recommendations for change.

The CSU Libraries will implement a ULMS in summer 2017, which will provide a suite of central capabilities that could create collective opportunities and efficiencies. Available funding in the CSU continues to move from central to local allocation, and the allocation of local funding will most likely be driven by the Graduation Initiative. The funding allocated via COLD is not expected to increase in the near future.

**Recommendations:**

**Theme: Data Reliability**

Provision of reliable, accurate, standardized, COUNTER-compliant data is deemed highly important by almost all respondents. Non-standard data is of notable concern for many campuses (Question 8).

**Recommendation:**

Prioritize the provision of reliable data in the Alma environment. Campuses, EAR, and SDLC should continue to advocate for standardized, accurate, and reliable data from vendors. Difficulty in obtaining standardized data disrupts and delays effective decision-making and hinders analysis and product comparisons. Campuses, EAR, and SDLC should emphasize collaborative efforts to exploit existing data reporting strategies as well as develop new ones in the Alma environment.

**Theme: Data Access**

Direct, easy access to relevant vendor statistics is essential (Question 8). Although data collection practices vary and respondents expressed a variety of expectations, campuses expect timely availability and delivery of reports for short- and long-range decision-making (Question 9).

**Recommendation:**

Explore how to make data and report access as seamless as possible, maximizing Alma’s flexibility (i.e., dashboard reports, widgets, and scheduled reporting features). Develop a set of reports for ECC resources to which campuses can subscribe. Exploit options for automatic harvesting with SUSHI. Find ways to reduce instances of missing or inadequate data, and share knowledge of difficulties in obtaining data. Develop a spreadsheet for ECC resources that specifies available reports (COUNTER and non-COUNTER), when statistics routinely become available, how they can be harvested, and vendor data retention policies.

**Theme: Report Variety**

Campuses depend upon a wide variety of report types for analysis of electronic resources; cost and usage data is relied upon most heavily but other report types and more complex data analysis are also sought (Questions 10, 13). Many libraries would like to obtain more information on how resources are used. E.g., How does a resource relate to curriculum? How are patron groups using a particular resource?

**Recommendation:**

Prioritize development and delivery of commonly-used cost and usage reports but also examine how to provide more sophisticated usage analysis reports that connect electronic resource usage to other areas, such as ILL and print usage. Consider hiring “a sophisticated data person” (Q15), to work with PeopleSoft to “correlate usage with student achievement.”

**Theme: Centralized Support**

Campuses expect ECC analytics in Alma to be developed centrally; a majority of campuses favor a hybrid support model: central support working with an analytics group comprised of campus representatives

(Question 14).

**Recommendation:**

Identify both central and campus contacts with “design analytics” role, who can be available to supportreport creation and data retrieval, especially in the initial year of implementation and during renewalperiods. Share tips and tricks. During ECC drop/add review periods, prioritize the provision of relevantreports. Shared responsibilities between SDLC personnel and campus ‘community of experts’ might be away to accommodate various data needs and exploit both Alma and external (vendor) provided data toproduce reports, support collection decisions, etc.One respondent indicated the need for: “a centralized list of vendors, contacts, and URLs for ECC andopt-ins (tech support, usage data, training)” as well as “a straightforward calendar of renewals.”Another respondent suggested: "Perhaps a new resource and a renewal template that includes theseelements: previous year's price, renewal price, % increase, usage report including CPU if available. Thiscould be sent to campus coll dev when a resource is under consideration for subscription or renewal."Another noted: "We need a better calendaring of renewals, stats, and deadlines.”See Question 16 for additional comments.

**Theme: Shared Reports**

Campuses expect the Alma environment to offer opportunities to share reports and report criteria

(Question 15).

**Recommendation:**

Exploit Alma’s report sharing capabilities, with the goal of reducing the individual labor of producing reports or retrieving data. Widely solicit recommendations for a common core of report types or queries for use by CSU libraries.

**Theme: Ebook Analysis**

Vendor reporting practices for ebooks make it difficult to compare ebook packages. Some vendors provide BR1 statistics, others provide BR2.

**Recommendation:**

Prioritize constructive conversations with vendors regarding the delivery of appropriate COUNTER statistics for ebooks. Consider availability of COUNTER statistics in vendor negotiations.

**Electronic Resource – Electronic Books**

**Volunteers:** Bliss (San Diego), Moy (Dominguez Hills, Convener), Hagan (Humboldt)

**Charge:** Provide COLD with a proposal for moving electronic book acquisition from local to central post ULMS Implementation. The CSU Libraries will implement a ULMS in summer 2017, which will provide a suite of central capabilities that could create collective opportunities and efficiencies. Available funding in the CSU continues to move from central to local allocation, and the allocation of local funding will most likely be driven by the Graduation Initiative. The funding allocated via COLD is not expected to increase in the near future.

**Recommendation:** The question of ebooks and the move to centralization is a complex one. Campuses are at a different stage of development regarding their e-book collections, some having added many single titles with perpetual access. How we move to more centralized acquisitions is going to take further in-depth study of the collections and collection development practices of individual campuses. The EAR Committee recommends that COLD direct it to establish a time frame and call for a committee to accomplish the following next steps:

* Have conversations with ebook vendors to find out what might be possible. Perhaps target ones that were suggested in the survey results, such as JSTOR, to see what they have to offer. Consider interoperability with Primo. We could then share that information with all interested parties, and continue the discussion.
* Figure out the best acquisitions model, one that ideally will work for everyone.
* Determine what a core collection, such as Academic Complete, means for all of us.
* Involve long-term collection folks in this process.
* Examine overlap of current titles across campuses.
* Address potential costs, given budget cuts. How much can a campus reasonably chip in?
* Evaluate access options. Can we afford truly unlimited access to titles for everyone? Should we negotiate for 50 simultaneous users across the system as an example?

**Initiative 4: 3 Electronic Resource – Media**

**Volunteers:** Stover (Northridge) and Grombly (Convener, Bakersfield), Gu (Sacramento, Hanson (MB), Yi (SM)

**Charge:** Provide COLD with a proposal for a media pilot for post ULMS Implementation. The CSU Libraries will implement a ULMS in summer 2017, which will provide a suite of central capabilities that could create collective opportunities and efficiencies. Available funding in the CSU continues to move from central to local allocation, and the allocation of local funding will most likely be driven by the Graduation Initiative. The funding allocated via COLD is not expected to increase in the near future. Report can be found in appendix

**Recommendation:** Recommend that COLD charge EAR to develop and conduct a Media Acquisition Pilot. To do so, EAR will:

* Gather collection data on what media has been acquired by each campus library and centrally and how it was selected;
* Develop a budget to build an argument for funding the pilot from the ECC
* Select an acquisition model
* Search for vendors that can support the selected acquisition model
* Evaluate access and discoverability options offered by selected vendors

**EAR 5 YR Budget Recommendation Plan**

**Strategic Priorities for ECC**

* Address deficit spending and collection erosion created by regular inflation and increased vendor costs and years of flat ECC budgets.
* Move journal content from campus expenditure basis (all-in) to ECC to make use of consortia pricing and long term contracts
* Move resources with opt-in participants to ECC to make use of consortia pricing and long term contracts and provide access to students across the system (academic complete, business complete, emerald, science online, etc.)
* Treat reference works not as a separate category, but place into subscription or one-time conversations as needed.
* ULMS will allow CSU-wide acquisition and access of non-aggregated materials. Focus CSU one-time allocations on perpetual access to core eBooks, streaming media and audio resources as part of the ECC.

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| 5 YR Budget Proposal | Amount | Type |  | Notes |
| 2017/2018 | $135,000 | Increase | Inflation | Maintain CSU Electronic Core Collection (Subscription): Actual ECC Deficit as a result of incremental cost increases over the years $135,000 plus 5% for items on annual renewal. Rationale: CO has been paying with one-time allocations for years. A permanent increase in base funding will stabilize access to core databases for all CSU students at significantly reduced consortia prices. |
| $90,000 | Increase | Content | Content to ECC: Maintain Ethnic NewsWatch $26,652 and GenderWatch $28,821, and add Chicano & HAPI Database.  Ethnic Newswatch and Genderwatch were added to the core collection as a result of the CSU Ethic Studies Report: <http://www.calstate.edu/AcadAff/ethnicstudiesreport.pdf>. CSU paid last year at consortia prices which allowed the system to pay less overall for the databases and at the same time opened access to students at the 6 campuses that did not already subscribe.  15 campuses already subscribe to Chicano Database so this addition would add access for students at 9 campuses. 5 campuses already subscribe to HAPI so this addition would add access for students at 18 campuses. |
| $200,000 | One-Time | Content | Leverage newly implemented ULMS to acquire and serve electronic books, media, and audio centrally in order to make use of consortia pricing and insure universal access to core materials for students across the system. Priority would be to add JSTOR content not already in ECC. |
| 2018/2019 |  | Increase | Inflation | Maintain CSU Electronic Core Collection (Subscription): Incremental cost for items on annual renewal. |
|  | 125,000 | Increase | Content | Content to CSU Electronic Core Collection (Subscription): Upgrade all campuses to Academic and Business Complete  7 campuses already have the Complete package while 16 subscribe to the smaller Premiere package. The addition would upgrade access to additional content for students at 16 campuses. |
|  | $200,000 | One-Time | Content | Leverage newly implemented ULMS to acquire and serve electronic books, media, and audio centrally in order to make use of consortia pricing and insure universal access to core materials for students across the system. Priority would be to add core electronic books and reference works. |
| 2019/2020 |  |  |  | Maintain CSU Electronic Core Collection (Subscription): Incremental cost for items on annual renewal. |
|  | 200,000 | Increase |  | Content to CSU Electronic Core Collection (Subscription): Science & Nature Online  Support CSU STEM initiatives. 14 campuses already subscribe to these two resource so this addition would add access for students at 9 campuses |
|  | $300,000 | One-Time | Content | Leverage newly implemented ULMS to acquire and serve electronic books, media, and audio centrally in order to make use of consortia pricing and insure universal access to core materials for students across the system. |
| 2020/2021 |  |  |  | Maintain CSU Electronic Core Collection: Incremental cost for items on annual renewal. |
|  | 230,000 | Increase |  | Content to CSU Electronic Core Collection (Subscription): Oxford University Press  All 23 campuses currently subscribe to this core full-text resource. Moving this resource into the ECC would allow the consortia to leverage size for better pricing and assist campuses that struggle to maintain this resource for their students on the all-in plan as the vendor pulls content from journal aggregators. |
|  | $300,000 | One-Time | Content | Leverage newly implemented ULMS to acquire and serve electronic books, media, and audio centrally in order to make use of consortia pricing and insure universal access to core materials for students across the system. Priority would be to add core media. |
| 2021/2022 |  |  |  | Maintain CSU Electronic Core Collection: Incremental cost for items on annual renewal. |
|  | $200,000 | Increase |  | Add Content to CSU Electronic Core Collection (Subscription): Emerald 120 and IBIS world  Support Business programs at the undergraduate and graduate level, many of which now have significant numbers of online and distance students across the system. 15 campuses already subscribe to Emerald 120 so this addition would add access for students at 8 campuses. 14 campuses already subscribe to IBIS World so this addition would add access for students at 9 campuses |
|  | $300,000. | One-Time | Content | Leverage newly implemented ULMS to acquire and serve electronic books, media, and audio centrally in order to make use of consortia pricing and insure universal access to core materials for students across the system. Priority would be to add core audio. |