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Group Therapy

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Group Therapy

by **Rosann Bazirjian** (Assistant Dean for Technical & Access Services, University Libraries, The Pennsylvania State University, 507 Paterno Library, University Park, PA 16802-1812; Phone: 814-865-0404; Fax: 814-865-3665) <rvb9@psu.edu>

GRPE: Submitted by **Lauren Corbett** (Acquisitions Team Leader, Emory University)

I've started shifting more of my electronic subscription business to an agent, including billing for a couple of consortia purchases. While it's not yet as smooth of an ordering process for me as it is with the print subscriptions, my volume is growing to the point where I feel the benefits will outweigh the hiccups in the process. I haven't been through a renewal yet with my agent, but I know I can't keep handling so many direct subscription renewals and I want the reports that I get from my agent.

Also some publishers have notified me of the introduction of penalties for late payments, by fees or a shutdown. This seems less likely to be a problem if I've paid my agent, rather than having an invoice passing through the library, the university accounts payable, and a third party or central state office cutting checks.

For those substituting electronic for print subscriptions, continuing to use an agent can keep service charges level.

Overall, I believe the core reasons for using agents apply to the electronic subscriptions as well as the print. And I believe this to be true for not only the libraries, but the publishers too.

RESPONSE: **Kathleen Born** (Vice President/Director, EBSCO)

A substantial percentage of a subscription agent's business is processing orders for electronic journals, online databases and publisher packages whether ordered by the institution or through a consortium. To provide assistance with handling and tracking the online journal transactions, EBSCO has changed internal processing procedures and developed new services to assist customers in managing electronic resources.

EBSCO maintains a knowledgebase of publisher licensing and registration requirements, authentication options, e-resource URLs and customer specific information for online access. Using this information EBSCO processes electronic subscription orders with accompanying payments on a daily basis. Automatic registration and rapid access to online content occur with participating publishers.

EBSCO can assist consortia and publishers by gathering information about consortia members (FTE, number of sites, current inventory of publisher titles on order, etc.) necessary for pricing a publisher's online package. Once the price is negotiated EBSCO can provide an itemized invoice showing the cost of each title in the package. EBSCO can also ensure that the library receives any applicable discount on print titles. Payment to the publisher is timely and electronic invoicing expedites posting payments to the library system. Price increases set forth in a license agreement are monitored at renewal.

EBSCO alerts customers to price changes for electronic access (free to paid) and provides reports notifying customers of available online access options. EBSCO can also provide serials management reports that allow the library

to integrate the package(s) with traditional serials for collection analysis.

RESPONSE: **Beth Bernhardt** (Electronic Journals/Document Delivery Librarian, Univ. of North Carolina at Greensboro)

During the last two years, Jackson Library at the University of North Carolina at Greensboro has moved many titles from print to online only. We first identified our holdings with publishers such as Oxford University Press and Cambridge University Press. Then we sent our title lists off to our faculty departments for input. Once we had answers back from the departments, we sent our list off to the agents and informed them of the changes in format. Everything has gone smoothly with this process. We have had a few bumps along the way, but nothing major.

I have found the agents very responsive to my needs. I work with them on setting up online access, getting subscription numbers etc. I also have had great success with them notifying Ingenta/IngentaSelect of our title holdings. When Highwire Press notifies me that a title will expire in a month, I just email my agent representatives and they take care of making sure my subscription doesn't expire. Yes, it is still time-consuming to keep track of online titles, but I would not want to have to deal with separate invoices for each one coming through my office. I agree with Lauren's statement "that the core reasons for using agents apply to the electronic subscriptions as well as the print."

RESPONSE: **Craig Hoyer** (Regional Sales Manager, Swets Information Services)

The world of serials is in constant flux, and has been since the advent of electronic resources. While accessing electronic resources, in particular electronic journals, has become easier for the end-user, it is anything but easy for the librarian. With print, all a librarian had to do was place the order with her subscription agent, who placed the order with the publisher and provided management services to the orders in place, handling claims, invoicing, cancellations, renewals, and providing a host of reports to help manage the library's collection. With electronic journals, librarians need to wade through license agreements, arrange for online access, maintain URLs, keep track of the thousands of titles the library has access to, and in many cases deal directly with publishers to handle the entire process. What can be done to help ease the burden placed upon librarians to manage electronic resources and provide the necessary management tools to oversee the ever-growing electronic resources collection?

Take heart, because a full-service subscription vendor can help ease the pain of dealing with electronic journals, just as they have done with print journals. Your subscription agent should be able to do the following: request online access on behalf of the library, make payments (including currency exchange, if required), provide invoices, provide publishers with pertinent set-up information (i.e., IP addresses, domain name, electronic resources con-

tact), maintain and update information records, and contact publishers when problems arise, such as access being turned off, or not being activated in the first place. These traditional services not only benefit libraries, but publishers as well. Many publishers do not have the back-office infrastructure in place to provide the level of customer service available from a full-service agent, or the ability to provide timely processing for the thousands of orders they receive. Subscription agents have been performing these tasks for years, and have made the necessary investments to provide new services to help facilitate access to online content. Full-service vendors have developed services that eliminate the need to maintain journal URLs, provide linking between various resources, and a host of administrative features that enable librarians to manage their online collection.

Subscription vendors can also provide libraries with useful management reports. These help manage their online collections, including comprehensive reports that detail which journals are available electronically, including available format and how they can be accessed. When using vendor services, libraries can receive and download comprehensive usage reports, in a variety of formats. Agents can provide EDI invoicing, which provides libraries with an itemized breakdown of package titles on order through publishers. Such reports and invoicing options are not typically available through publishers. Yes, the core reasons for using agents apply to electronic subscriptions as well as print. We help libraries manage their collections.

RESPONSE: **Deanna Graham** (Journals Licensing Sales Manager, The Americas, Blackwell Publishing)

Lauren Corbett has raised some very good points about the benefits of using agents for processing electronic subscriptions, particularly in terms of central billing. These benefits have, of course, long been known in the handling of large numbers of print subscriptions and it's natural that they should also apply in the electronic arena.

At Blackwell Publishing we fully support the role of agents in all our sales activities. We offer a 5% discount for all sales facilitated through agents, be they consortia purchases, print or electronic subscriptions. For us the benefits of a single invoice for a large number of subscriptions, the reduced risk of late payments, and the single point of contact rather than a large number of direct renewals also apply. As Lauren Corbett asserts, the benefits of using agents for print subscriptions are transferable to electronic, for publishers as they are for librarians.

RESPONSE: **Ed Barnas** (Journals Manager, NAB, Cambridge Univ. Press)

Lauren's comment covers a variety of issues and I'll try to address what I can.

Agents do provide a valuable service to both libraries and publishers by consolidating orders for both parties — the library cuts one order

continued on page 18

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Some Practical Models For... from page 1

to tackle CCD across their whole collections. The most important element for getting projects off the ground seems to be leadership, which may come through temporary grant funds or from the determination of one or more participants.

So — we present these models:

- Cooperative building of a national level collection by research libraries in the U.K. of materials on **Russian and East European Studies** by **Dr. Gregory Walker**. This project is intended as a model for future cooperative projects, including elements of acquisitions (including research mapping and a National Desiderata List), retention (including serials deduplication), and acceptance of transfer.
- A bibliographer for South Asian studies shared among the **TRLN** libraries contributed by **Kim Armstrong**.
- A shared print journal archive for the **University of California** libraries described by **Dr. Cynthia Shelton**.
- A regional group of **OhioLINK** members cooperating in non-core areas of religious studies, their success due much to the personal efforts of the author, **Paul Jenkins**.
- The work of a consortium liberal arts college libraries is discussed by **Marian Shilstone**. This group has put careful thought into the groundwork for **CCD** and has tackled the difficult issue of the notion of the “core” collection.
- And finally, a project focused on collections of U.S. government depository publications that includes many of the same elements of the first model — acquisitions, retention, and acceptance of transfer. **Mary Prophet, Megan Fitch, and Joy He** author this article.

Group Therapy from page 16

covering the journals of many publishers and the publisher gets one order covering journals from many libraries.

However, online subscriptions have brought changes. While a library could consolidate shipment of all their print journals through an agent's warehouse, the activation process for online titles varies from publisher to publisher and we find we need more information about the library customer to effectively maintain their online access.

One area of concern to publishers with the multiple types of subscriptions — print-only, online-only, or print+online bundle — is confusion in the renewal process. This may be the source of Lauren's comment about penalties for late payment. We have noticed that several agents have renewed a number of orders that had been for a print + online bundle one year as a print-only subscription for the next year. Such “renewals” kick out of the automatic processing system at the publisher's end and have to be changed over to the new subscriber type, usually manually. When the online access is terminated, either at the end of the year or the end of the online grace period, the library customer realizes the problem and often wants the order converted back to the print + online combination. This results in another manual intervention and, in some fulfillment systems, loss of subscriber history data. For many journals, particularly in the humanities and social sciences, the overhead cost of these multiple changes exceeds the difference in subscription price. I would ask librarians to review their agent's consolidated renewal orders carefully to make sure that it includes the desired level of online access.

Give us the Tools: The CURL-CoFoR Project in Britain

by **Gregory Walker** (CURL-CoFoR Project Manager)
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Origins of the Project

CURL-CoFoR has its roots in the earlier **COCOREES** project, which ran from 1999 to 2002 as one of several **Collaborative Collection Management (CCM)** initiatives launched by the **Research Support Libraries Programme (RSLP)** with the support of UK government funding agencies for higher education. For the first time, it provided the resources with which to lay the groundwork for the major British collections in **Russian and East European Studies (REES)** to work together systematically on improving library provision for researchers in the field. Four interim **COCOREES** reports and its *Final Report* are accessible on the project Website.¹⁻⁵

Early in 2002 the project management was approached by the **Consortium of University Research Libraries (CURL)**, representing 25 of the largest academic libraries in the British Isles. **CURL's Task Force on Resource Management** was looking to work up and implement a range of procedures and documentation (“tools”) to support **CCM** for a variety of subjects in research libraries, and saw in **COCOREES** a promising platform for further development, testing and demonstration. In October 2002, shortly before the **COCOREES** project ended, the **CURL** Board accepted the proposal for a successor. While **Russian and East European Studies** remains the subject focus, the new project's remit has been to produce tools for **CCM** which can be widely applied in other fields.

The Project in Brief

The **CURL-CoFoR** project runs from December 2002 to August 2004. It is a partnership of twenty UK libraries, all with important collections in **Russian and East European Studies**, with two further associated institutions (*for a full list of partners, see Appendix*). **CURL** has provided funding to support a part-time Project Manager and two part-time Project Officers, while certain other partners — notably the **British Library** — have generously contributed additional staff resources and other facilities. The project is committed to delivering tested and agreed procedures and tools (model agreements, protocols, templates, etc.) to serve as a practical basis for the **Collaborative Collection Management (CCM)** of research resources in UK libraries. All deliverables have **REES** materials as their sub-

ject matter, and academic **REES** research as their primary object of support; but it is fundamental to the project that the outcomes should be delivered in forms that allow wider subject applicability. The committees of the **British Association for Slavonic and East European Studies (BASEES)** and of the **Council for Slavonic and East European Library and Information Services (COSEELIS)** are the project's academic and professional advisory bodies respectively.

The COCOREES Inheritance

CURL-CoFoR is much more than a simple extension of the **RSLP COCOREES** project, but **COCOREES** has provided **CoFoR** with an essential set of products, people and relationships:

- A searchable set of descriptions for research collections in **REES** in 80 UK libraries.
- A searchable location list of Russian and East European serials held in 52 UK libraries, currently recording c. 35,000 titles.
- Standard-format collection policy statements for partner libraries.
- A National Desiderata List of major research resources for **REES** to act as a basis for consortial acquisition.
- Development of an IT infrastructure for the above, all of which are accessible on the project Website at <http://www.cocorees.ac.uk>
- Accessions and expenditure data for **REES** from partner libraries.

CURL-CoFoR has benefited immensely from this inheritance of several major bodies of factual information about the library resources with which it is engaged, as well as from the experience of area/subject-specialised IT development work. There has also been the advantage of continuity in personnel. All four members of the **COCOREES** management, including the present Project Manager, joined the new Management Team, and both Project Officers also transferred to **CURL-CoFoR**.

The Partnership Agreement

CURL is committed to playing a leading role in seeking to maintain and develop a governance structure for a UK-wide **CCM** scheme beyond the completion of the **CURL-CoFoR** project in August 2004. This is likely

continued on page 20

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