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ATG Interviews Faye Abrams

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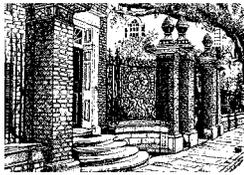
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ATG Interviews Faye Abrams

Projects Officer, Ontario Council of University Libraries (OCUL)

by **Tony Horava** (Collection Coordinator, University of Ottawa) <thorava@uottawa.ca>

Faye Abrams is Projects Officer at OCUL (Ontario Council of University Libraries, Canada). She can be reached at: <faye.abrams@ocul.on.ca>. The following is a transcript of a conversation.

ATG: *You've been closely involved in licensing at the consortia level for a number of years. What are the biggest changes that you've noticed?*

FA: I think the biggest change is the proliferation of products being bought collectively. OCUL itself has been in existence for about forty years but it only became seriously involved in consortia buying, at the time I was hired as the OCUL Projects Officer. Before this, OCUL was involved in some collective activities such as IUTS (Inter University Transit System) and IUBP (Inter University Borrowing Program) cards and the purchase of items like Tattle Tape, so we didn't buy much content together until about eight years ago.

This is what we do now. OCUL is involved in purchasing quite extensively for the group, which is composed of libraries from the twenty universities in Ontario, Canada. We are partici-

pants in CRKN (Canadian Research Knowledge Network) which is a formal national consortium for academic institutions. We're also involved in Consortia Canada, which is a loose federation of volunteers, namely the heads of consortia, who buy digital content together. As well OCUL participates in COOL, the Consortium of Ontario Libraries, a multi-type library group, representing universities, colleges and public libraries and in the newly created Knowledge Ontario, a province-wide initiative. We also have licensing agreements with other regions in an informal way. It is quite normal for COPPUL (Council of Prairie and Pacific Universities) and OCUL to take part in a joint agreement.

I think the whole mindset of buying collectively has been the biggest change since I arrived. In the beginning when I spoke with vendors, I would have to explain who we were, what we did and what we expected from them. Now this is unnecessary. Internally, we think in collective terms, "OCULLy," and I'm thrilled about this. Typically an OCUL member will identify a product they like, and inform the rest of OCUL to see if anyone else is interested before beginning discussions on their own. I

think if we've done nothing else in the past eight years, we've made the Ontario university libraries aware of the advantages of working consortially.

ATG: *What has been the Ontario universities' approach to digital collections and services?*

FA: For OCUL, our vision has been to do things differently, and **Scholars Portal** is the tangible expression of this difference. How **Scholars Portal** will evolve is difficult for me to anticipate because it has grown so quickly. People think everything takes a long time to achieve, but in reality **Scholars Portal** is only in its infancy, having been launched in 2001. It has gone from a developmental project to now being in a "sustainable" mode.

ATG: *What was the philosophy behind the creation of Scholars Portal?*

FA: There were several drivers. A key one was that we shouldn't have to do things twenty times over. We could do things centrally, once, and have everyone benefit. The costs would be shared based on size and common sense fairness. Secondly libraries were having seri-

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ous space problems. For most libraries, it was financially impossible to acquire both the print and electronic formats of journals. The latter was being demanded by faculty and students especially in science, engineering, and medicine, so buying electronic journals as a collective seemed like an excellent idea.

Another of the guiding principles of **Scholars Portal** was to provide protection for this collection by hosting the products on our own servers. In this way our schools could feel secure in taking the plunge to switch to digital format. We aim to acquire perpetual access to the content loaded on **Scholars Portal**.

ATG: *How does this compare to a dark archive such as LOCKSS or Portico?*

FA: These services didn't exist when **Scholars Portal** was being developed; they were incubating. Only **JSTOR** was flourishing at the time. When I speak of the **Scholars Portal** as an archive, I refer to a living or working archive. It's not dark or dim — we test it every day; we know where it isn't complete. Many people worry about a dark archive, because they're not sure it will be there when they need it. We don't have that problem. We know where the deficits are and we're working to correct them. That brings up another very important role of **Scholars Portal** and it seems to work. Most of our libraries are quite content to buy in electronic format only knowing it is loaded on **Scholars Portal**. In Ontario we're talking about keeping a last print copy, we're looking at the logistics of how this could work. This is a huge project but this is understood as a complement to **Scholars Portal**, not a replacement. Another important driver behind the development of **Scholars Portal** was our plan for federated searching — for enabling searching across many databases, journal collections, and other publisher's resources, in a single search. We're still looking for the best tool — we haven't found it yet. We offer to our users both the native interface and the single search. There are pros and cons to both, of course

ATG: *Tell me about the content available in Scholars Portal.*

FA: When I talk to vendors about collaborating with us in a consortia deal with local load, and I list the highly respected publishers already on **Scholars Portal**, they are impressed. Elsevier, Springer, Wiley, Blackwell, Oxford, Cambridge, and SAGE are some of the major publishers on **Scholars Portal**. It's an impressive list. There are over 8,000 journals loaded.

ATG: *Does any archive contain more journal content, such as OhioLink?*

FA: I believe we have more, but we don't compare on a regular basis. Our funding model differs from that of **OhioLink**. They receive direct funding from the state, and as I understand it always buy on behalf of all their members. For **OCUL** there is no "money in the

middle" — we are supported by our members who pick and choose the titles they wish to pay for. There are a lot of other services we have started to think about delivering. I don't know if these ideas were in our thoughts at the beginning.

ATG: *Have these new services evolved over time?*

FA: Yes, in the context of working together and figuring out how much more cost effective and efficient we could be in a collaborative framework. I'm very proud of our **RACER (Rapid Access to Collections by Electronic Requesting)** ILL system, which is an unmediated central system serving all members. There were many growing pains, and schools had to adjust to losing some of their autonomy, but I don't think any school would go back to the previous way of working. As with many collective endeavors, it can sometimes be rather painful along the way, but it's working well now, and I hope that we will soon see the value of it in terms of dollars saved.

We have added **RefWorks** to our **Scholars Portal** and have begun using **Verde** as a license management tool. We are now looking to add eBooks and data/maps as well.

ATG: *How has the vendor community evolved to help libraries face new challenges, and what could they do better?*

FA: Sometimes people think vendors are our enemies, or our close friends, but I believe they are neither. They have a job to do, and so do we. I think that the advent of consortia took vendors by storm. I mean both the intermediary and the publisher. Certainly the agent community has been affected by the growth of consortia.

There are a few things the vendors could do better. They could send us their proposed renewals in an appropriate time frame. It takes time to prepare the message and send it out. Each school needs time to investigate, review, and bring back questions, before making an informed decision. Another problem — acknowledged by publishers — is the annual transfer of titles (buying, selling, swapping, etc). How do we keep track of them? **Project Transfer** is a great initiative in this respect. Another improvement would be how vendors deal with new content. I think it should be included in the package. This could be a win-win situation, although publishers do not initially see it that way. By adding the new titles to our **Scholars Portal** we give the titles instant readership and visibility. This is not normally the case for new titles. By ensuring their visibility, users will demand we maintain them, and pay for them at the next renewal.

ATG: *Have vendors matured in how they present offers to the consortium and how they deal with consortia?*

FA: Some are better than others. We concluded an agreement with a vendor in January 2007 and they informed us that this was their first consortia deal. It took a long time for them to understand what we expected. They did understand that there had to be some advantage in bringing together the interested libraries, and

spending time collecting the holdings information and that they had to provide better terms than what each school had independently. This agent now deals only with one person (me). **OCUL** has been doing this for awhile. We've been dealing with the big publishers — they are the best and the worst. The pricing was often quite high, and it was sometimes difficult for us to get them to accept a new model. The earliest models were quite limited, and publishers didn't know why they had to change. They now understand that we have a single license, a single invoice and single point of contact, and that there needs to be economic advantages and efficiencies for us.

Vendors also now realize that consortia speak to each other. Saying one thing to one consortium and a different thing to another consortium, doesn't wash. Perhaps in the past when we were dealing with title by title print copies, schools didn't discuss what they were buying, or issues regarding delivery and service. Consortia are responsible for this change as well. Consortia leaders who work together on behalf of a group meet in many different venues. We exchange our successes stories, our strategies, and we grumble about failures. Questions naturally arise. We realize we are a stronger group than we thought initially, and can say, this is not acceptable. Vendors now recognize that we want to work with them, and that our end users value their product, but there needs to be a rationale that all of us can understand and accept.

ATG: *What would you characterize as best practices in consortia licensing?*

FA: A best practice for our consortia would be to have "money in the middle" and not have to collect funds from each institution for each new product. Every member would provide funds according to an agreed-upon formula, and the group would decide on a list of priorities to acquire. This would be an ideal way of operating from my perspective. There are various other practices that would improve the way we do business. We would like to use our own model license more often and make the modifications as necessary for a given vendor. In this way our overhead is reduced — we wouldn't need to vet this with legal counsel. We are confident that our model license meets our needs and those of our vendors and serves as an educational tool as well.

If our license isn't accepted, we provide wording to our vendors for the particulars we need in their license. It may surprise you as to how many vendors have asked for us to provide wording to reflect our issues, either because they don't include them in their license, or had never thought of them as important. I'm thinking in particular of local loading because it is essential for us. This feature is not included in most publisher licenses.

I prefer a longer term license — three years seems to be an appropriate length, and most schools have agreed to this. There are specific reasons when a multi-year agreement is not a good idea, such as when a competing product is being assessed, or when there are known

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problems with a company. In such cases we would not want to commit ourselves for a long term. Negotiating is time-consuming, and many people have to be consulted. If I conclude a one year license that takes six months to negotiate, it is not efficient. Multi-year deals allow us to set caps on cost increases. This ensures a revenue stream for the vendor and reduces their overhead as well as ours. It is a win-win situation.

ATG: *So we're setting the parameters of negotiation to advance our members' interests?*

FA: Yes. As we look at a product, we consider local load and plan for it, especially for journal literature. However some products don't lend themselves to this. Where full text local loading hasn't been available, metadata that allows us to link to the vendor's site is an alternative. We always work toward the goal of local loading and don't give up once the license is signed. The loading issue comes up at every renewal. We feel that the compelling argument is that local loading would result in more satisfied customers. There would be greater use, to the benefit of both the publisher and the institution. We have been successful in negotiating local loading with various publishers, but not always on the first round.

ATG: *Tom Sanville has said, "The hardest thing is to decide what not to do, or what not to do anymore." What do you think we should not be doing anymore?*

FA: Many of these "not doing" decisions would occur at the institution level. We have

a group called the **Information Resources Committee**. It is made up of representatives from each member institution, and we meet twice yearly in person, and daily — hourly — via our listserv. This is an excellent forum for sharing ideas and learning about what individual institutions are 'not' doing. I see the changes occurring where more and more the discussion is moving to doing things collectively.

Some **OCUL** schools have reduced the size of their own cataloging departments, and are moving staff and resources to other areas. We have talked about shared cataloging — but this is still a question mark.

OCUL has recently initiated a partnership with the **Ontario Legislative Library** to provide an archive of Ontario government monographs on our **Ozone** (repository) platform. Next we will need to find a way to include periodical materials in this archive. There are a lot of things we can start doing collectively and let the individual schools stop doing. For example, we are looking at implementing institutional repositories for our smaller member schools that don't have this service locally.

ATG: *How can consortia be more effective than they are currently?*

FA: Earlier I mentioned how pleased I am that the people working in Collections at our member libraries think collectively. They think "OCULY" not locally. The more we think that way, the more we can move to a collective approach in other areas. I find it very exciting. When I started eight years ago I felt I was at the beginning of this new era for consortia. I was right. 🌱

Rumors
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NAPC is retiring December 31! I can't believe it. All of my favorite sales people are retiring! Yes, it's true. You will remember **Jim** from **Bell & Howell**, **UMI**, **ProQuest** and now **NAPC**. Well, after a long career, **Jim** is going on to the green pastures of his farm in Concord, NC. No doubt his wife and his twin grandbabies will fill his time! Keep in touch, Jim!

In between working mightily on the **Charleston Conference**, the go-getter **Beth Bernhardt** and her husband **Chris** and their daughter **Anna** took a great trip this summer to cool Nova Scotia hiking, canoeing, kayaking, etc., while many of us were sweltering from the heat. It sounds delightful!

And remember **Pam Rebecca Cowart**? She and **Sheila Bair** guest edited the February 2007 issue of **ATG** on **Metadata for Digitization Projects** which was so popular! Well, **Pam** is the new Director of Library Advancement at the **University of South Carolina** in Columbia. Congratulations, **Pam**!

It's always fun to see employees "grow up" and get professional library jobs! That's

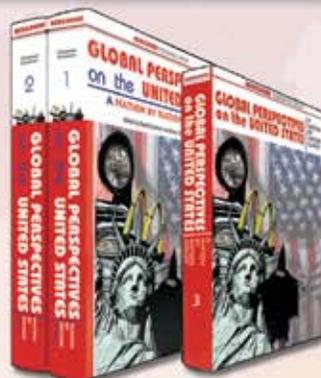
why I was thrilled to hear from **Dan Hanlon** <dhanlon@apa.org>, once a student at the **College of Charleston** and an assistant in the Collection Development Department! Well! **Dan** graduated in 2004 and went to library school. He is now an Associate Librarian for the **American Psychological Association** and will be in Charleston at the **Conference**. Like, **WOW** and way cool!

Another worker who has made good — **Todd Rid** worked for us as an Intern when he was a library school student at the University of South Carolina. Well, **Todd** is now at **Coker College** in Hartsville, SC and is working with implementing **Innovative Interfaces** and **ERM** at **Coker**.

So sorry to be missing the **75th Anniversary Grand Finale** at the **University of North Carolina at Chapel Hill School of Information and Library Science**. **Dr. Vartan Gregorian** (President, **Carnegie Foundation of New York**) will be presenting "In Praise of Reading." The finale is scheduled for **Monday, September 17, 2007**, which coincides with the date the school first began teaching classes in 1931. Coincidentally, the **Carnegie Corporation** provided **SILS** with its first grant

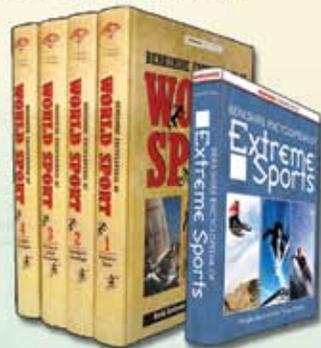
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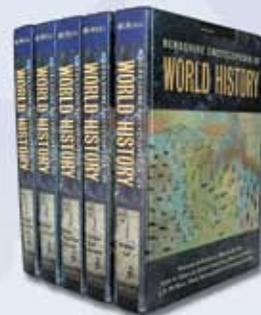
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