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TERMS 2.0 Discussion: Two Great Things That Belong Together: OAWAL & TERMS

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TECHNIQUES FOR ELECTRONIC RESOURCE MANAGEMENT 2.0

Two Great Things That Belong Together: OAWAL & TERMS

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INTRODUCTION

TERMS: Techniques for Electronic Resource Management:

<https://library.hud.ac.uk/blogs/terms/>

Archive of TERMS version 2013

https://works.bepress.com/jill_emery/63/

OAWAL: Open Access Workflows for Academic Librarians:

<https://library.hud.ac.uk/blogs/oawal/>

New Team



Why Change Now?

- **Content needed updating on both sites**
- **Concepts emerged**
- **Recognition of overlap between the two projects**

Developments from HHuLOA

- **Chris Awre, Paul Stainthorp, & Graham Stone**

Slides from the final OAGP event in Manchester, 26 June 2016:

- <https://library.hud.ac.uk/blogs/hhuloa/2016/07/28/slides-from-the-final-oagp-event-in-manchester-26-june-2016/>
- **Open Access Good Practice:**
- <https://www.jisc.ac.uk/rd/projects/open-access-good-practice>

Developments from HHuLOA

	Investigating new content for purchase	Acquiring new content	Implementation
Hybrid	<ul style="list-style-type: none"> Offset agreements / APCs 	<ul style="list-style-type: none"> APC workflow 	<ul style="list-style-type: none"> Is the article actually open access (checking)?
	<ul style="list-style-type: none"> TCO 	<ul style="list-style-type: none"> APC fund (who is paying, or which budget is paying?) 	<ul style="list-style-type: none"> Is the right licence applied?
	<ul style="list-style-type: none"> Licences: article licences (CC) / resource licence 	<ul style="list-style-type: none"> Negotiation on the terms of availability (see top three boxes to left) 	<ul style="list-style-type: none"> Record any issues arising
	<ul style="list-style-type: none"> Pre-payment for APCs (and other business models) 		<ul style="list-style-type: none"> Add article to repository (as it is Gold)
	<ul style="list-style-type: none"> OA in aggregator/secondary information sources and impact on subscription 		
			<ul style="list-style-type: none"> Add to discovery tool index
			<ul style="list-style-type: none"> Technical testing
			<ul style="list-style-type: none"> Marketing and training (embedding)
			<ul style="list-style-type: none"> ERM (national or local) and admin information
Open Access	<ul style="list-style-type: none"> Predatory publishers 	<ul style="list-style-type: none"> Terms of use 	<ul style="list-style-type: none"> Checking public discovery (via web search engines)
	<ul style="list-style-type: none"> DOAJ / ISSN ROAD 	<ul style="list-style-type: none"> Institutional OA journals 	
	<ul style="list-style-type: none"> OASPA / COPE membership 	<ul style="list-style-type: none"> Library presses 	<ul style="list-style-type: none"> Absence of AuthZ
	<ul style="list-style-type: none"> Licensing stated 	<ul style="list-style-type: none"> Academic led publications 	<ul style="list-style-type: none"> Absence of AuthN
	<ul style="list-style-type: none"> All the above relate to validation 	<ul style="list-style-type: none"> Data 	<ul style="list-style-type: none"> But we do need Accounting / IdM / personalisation
	<ul style="list-style-type: none"> Collection development 	<ul style="list-style-type: none"> Books 	
	<ul style="list-style-type: none"> Other repositories / CORE 	<ul style="list-style-type: none"> Etc. 	

Development of TERMS 2.0

- **Investigating new content for purchase or addition**
- **Acquiring new content**
- **Implementation**
- **Ongoing evaluation, access, and annual review**
- **Troubleshooting problems**
- **Preservation**

80/20 Rule

“Most of the resources you purchase will not require a large amount of your time—that is, about 80% of the resources you acquire will take just 20% of your time. In this project, we will call those standard, or basic, resources. Not because the content is basic or standard, but because the electronic resources librarian’s time is efficiently used in getting it established. While there may be some correlation between the cost of a product and the amount of time it takes to get purchased and available to patrons, that is not a given; some will be easy to establish, despite all of the money being spent on them.” McCracken

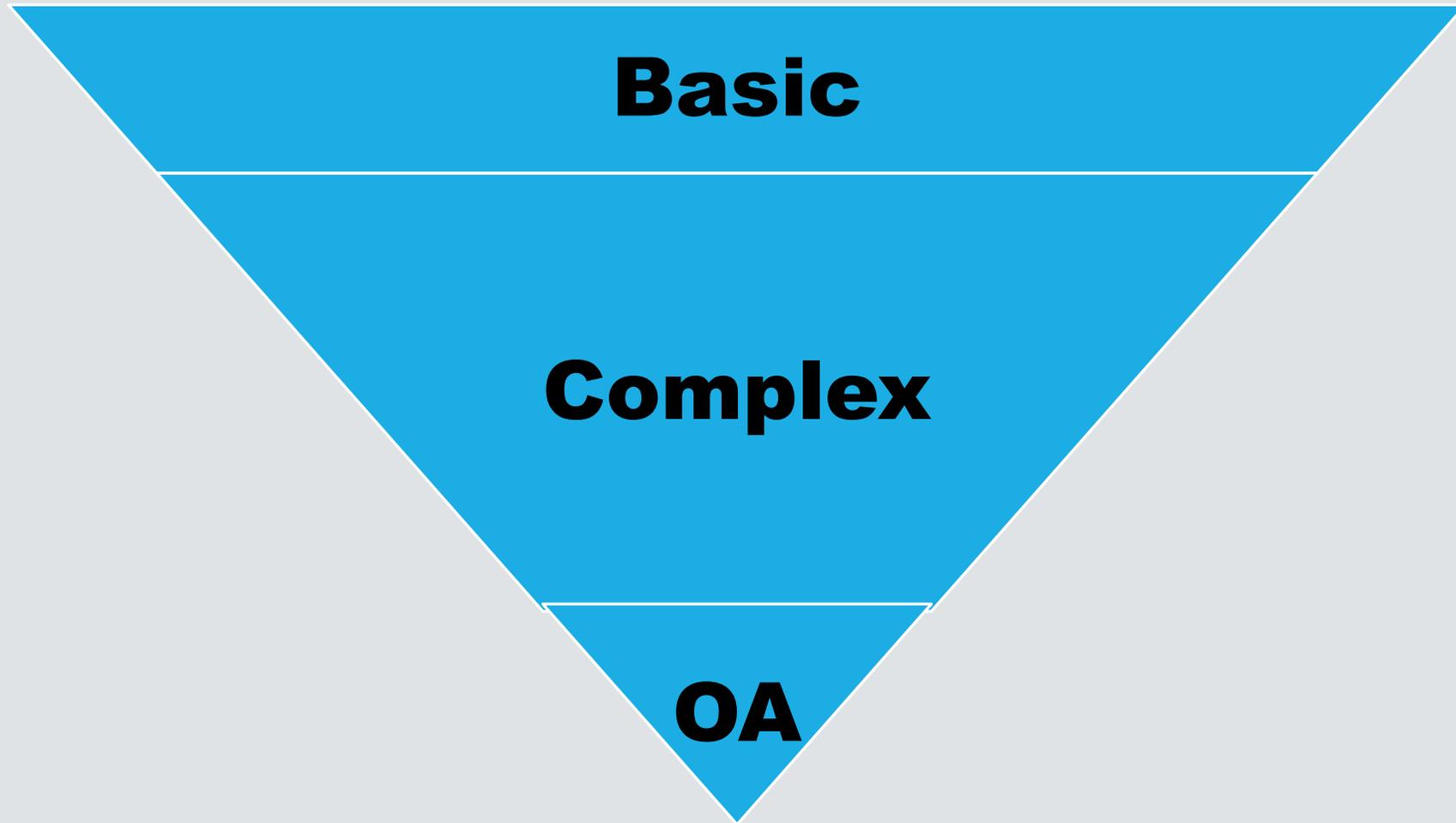
80/20 Rule

“The other 20%, however, will take up about 80% of your time managing electronic resources. These may be simple or inexpensive resources, but remember that time is also money, and time spent on an inexpensive resource quickly makes it an expensive resource. We will call these complex, or advanced electronic resources, as they take up more time than they really should.” McCracken

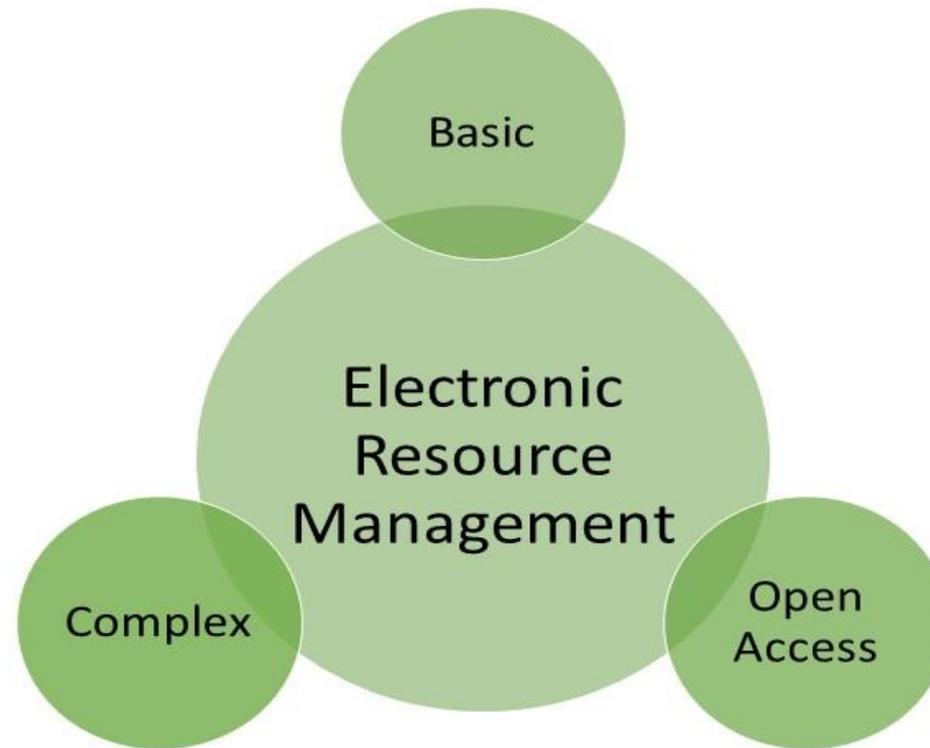
Open Access

Open Access resources will be the third category of resources to be managed. While the resources may cost minimal amounts in regards to acquisitions, the management and application of maintenance structures and preservation standards are applicable along the lines of for-fee resources. This is especially true when the resources are highly sought after by your end-users.

ER Management



The Concept



TERMs 2.1

Investigating New Content for Purchase/Addition

Request

Develop selection criteria

Completing the review form

Analyse and review

Establish trials & contact providers

Choice

Request

Requests for new resources often comes direct from academic staff via online forms, websites, and/or academic liaison colleague serving various constituents

- **Basic: Contact a vendor, provider, subscription agent, book supplier, consortium contact, ask for price information, review the license, and implement the purchase.**
- **Complex: Streaming media; is it even available streaming?**
- **OA: Listed in DOAJ, OASPA, Peer-review?**

Develop selection criteria

Basic: relies on pre-established collection criteria at local and consortia levels

Complex: may not fully comply with collection criteria but content needed enough to make exceptions; what are the acceptable exceptions?

OA: Don't need to add everything, try to add what may be relevant to your audiences

Completing Review Form

Basic: the information surrounding order selection is housed within the notation fields provided within the procurement or resource management system

Complex: ITT or RFP documentation may be needed/used

OA: documentation of APC to be paid and/or faculty request noted

Analysis & Review

“In times of austerity we can no longer afford to subscribe to multiple resources that have a large overlap” Stone

- **Basic/Complex: check whether the request for new resources can be satisfied by existing subscriptions or whether there are alternatives available**
- **OA: can also check for overlap and preferred platforms**

Establish trials & contact providers

- **Basic:** Fill out the trial form or send an email requesting a trial
- **Complex:** Try to negotiate for the broadest access possible for as long as possible in order to insure the product will work optimally in your computing environment
- **OA:** See if local faculty publishing with journal or content provider

Choice

“When you make the decision to purchase content from the provider, you then need to determine the purchasing model to be employed.” Emery

- **Basic: agree to purchase**
- **Complex: Using your selection checklist, insure the content meets the desired needs, begin negotiation of business terms for purchase**
- **OA: Begin process of activation or acquisition as needed**

Discussion & Questions

- **Where to find more information & to participate:**
- **Blog:** <https://library.hud.ac.uk/blogs/terms/>
- **Facebook:** <https://www.facebook.com/groups/174086169332439/>
- **Tumblr Bog:** <http://6terms.tumblr.com/>
- **Twitter:** <https://twitter.com/6TERMS>