2-1-2013

The Role of the Modern Intermediary and What Constitutes Value in the Library of 2012

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Citation Details

Emery, J. (2013). The Role of the Modern Intermediary and What Constitutes Value in the Library of 2012. Against The Grain, 25(1), 27-29.

The Role of the Modern Intermediary and What Constitutes Value in the Library of 2012

by **Jill Emery** (Collection Management Librarian, Portland State University) <jemery@pdx.edu>

First off, let's talk about the current landscape for academic and academic research libraries in the United States of America. In regards to subscriptions, the majority of academic and academic research libraries now have 75-80% of their collections delivered electronically, and this is rapidly becoming true for monographic purchasing as well. At the same time, library budgets are best described as being fragile and not nearly as consistent as they were in previous decades. Many academic institutions in the United States have seen rapid declines in State funding support for public institutions. In many cases, the State funding support for higher education has dropped below 20%. In order to make up for this loss of funding support, public institutions have been raising tuition costs and trying to find new revenue streams through partnerships with private companies and corporations and research funding support. This has led many public institutions to adopt what is referred to as performance-based budgeting models in which departments within the institution are given funding based on credit hour generation and research grant funding. Since academic libraries are revenue-supported departments as opposed to being a revenue-generating department, their funding has become more reliant than ever on the overall financial well-being of the institution. In this environment, academic librarians are pressed more than ever to prove their value, and the return on investment of the collections is a crucial aspect to the story line of value to the academic health of the institution. In order to capitalize on the funding we do have, librarians and libraries are collaborating more than ever. My institution, located in the upper reaches of the Pacific Northwestern part of the United States, participates in the **Orbis Cascade Alliance**, which serves 37 institutions in three states. Recently, we have been participating in a couple of electronic resource deals that span the entire nation by consortia partnering with one another. In order for this type of collaboration to work, librarians are doing much of their work through cloud computing, shared documents, and email.

In this environment, **librarians need better support from intermediaries regarding basic subscription maintenance**. A new support role for intermediaries is to help librarians track where local faculty are publishing. As librarians start to work more closely with their research offices, being able to identify readily the interests and publication patterns occurring on their campuses is becoming very important. In order to prove value and the best return of investment of collections budget spend, librarians need help in identifying where there is overlap of subscription packages and aggregator content. Right now, the best tool for this type of information is being provided by **JISC**, in the UK. Libraries and librarians would also benefit from intermediary platforms that are not black boxes and stand-alone tools but rather integrate with other library services and tools through APIs and cloud services. As mentioned above, consortium support is only going to become increasingly important and valuable as resource sharing expands within the United States.

There are three subscription maintenance stories that are worthwhile to present.

The **first story** is about the **JSTOR** Current Scholarship program that began to be promoted in 2010 with a go-live date for January 2011. After many pleas from librarians from many sectors, **JSTOR/ITHAKA** made a commitment to start providing current subscription access on their platform. As one of the oldest electronic resource platforms around, **JSTOR** has great brand recognition on academic campuses throughout North America, and this move was made in response to librarians voicing frustrations over having to direct patrons to different platforms for current subscriptions and the historic collections. To their credit, **JSTOR/ITHAKA** followed the Transfer Code of Conduct for transferring content from one provider to another quite closely in almost all cases of the current content they were providing. In some instances, the contracts signed with individual content providers did not allow much lead time in announcing the move to the **JSTOR** platform, but **JSTOR** made a concerted effort to make the transfer of titles to their platform as widely known as possible. Starting in June 2010, academic libraries were told to keep an eye out for content moving to the **JSTOR** platform, and a small title list of what had been negotiated up to that point was released. Many librarians began work to evaluate the costs and coverage options of these titles and inform their public services and faculty of the impending move of content. In September 2010, a more complete list of the titles to be transferred was released, and many librarians began to change their records and to indicate to their intermediaries that these changes were imminent. However, some intermediaries stated that since they did not yet have a finalized list from **JSTOR/ITHAKA**, they could not begin the transfer of a library's renewal list until the final list was received from **JSTOR/ITHAKA**. Librarians continued on with their local record changes and updating the information/renewal with their intermediaries all the same, and in some instances multiple spreadsheets were exchanged. In the end, most titles were successfully transferred but there was at least one case where a library experienced a loss of access due to titles missed during this transfer experience. In cases where short-staffed libraries outsourced the electronic journal activation work to their intermediaries, there was at least one case where the titles did not get transferred till June 2011, a full year after the initial announcements and title lists were made available.

In the **second story**, the transfer announcements were not wide-spread and not as well-known. In June 2011, at the **Special Libraries Association Conference**, the **American Institute of Physics** announced that it would be discontinuing support for other societies' content on their Scitation platform in 2012. Initially, the changeover was set for January 2012, but it was then extended through June 2012 since many publishers were unable to find a new platform for their content readily. This information was not as widely distributed as the **JSTOR** transfer news was, and while librarians in attendance at the **SLA Conference** did bring the information back to their home institutions, it was not always readily conveyed to the librarians and support staff managing the subscriptions. In January 2012, one intermediary still listed in their title database that much of this content was still on the Scitation platform, and there were not any notes to indicate that a move to other platforms had occurred or was going to occur within this calendar year.

In the **last story**, **Taylor and Francis** has moved publication platform three times in a ten-year time span. With each move to a new platform, subscriptions had to be re-instated and re-established for many libraries, intermediaries were not always as pro-active in this management, and libraries and librarians experienced a loss of access to content they had previously held on a prior platform.

All in all, the conclusion from these stories is clear: subscription management in the electronic environment is still very much an issue and one in which intermediaries can improve their services to libraries and librarians.

As noted previously, librarians are now collaborating more than ever with their institutional research offices and are working hand-in-hand with these departments to better understand and track local publishing and research production. In part, this is being done to prove value to the institution but also in order to maximize the funding support and to try to best quantify research support from both areas. In this way both departments are working very closely with faculty. There is a unique role here for the intermediary in helping the library/librarians with local author tracking and local publication. This is an area where there could be growth for the intermediary if they can find a way to include such information within their title bases.

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Most academic research libraries are now undertaking journal evaluation studies and looking at both the impact factors and equivalent measures coupled with cost per use. In many cases, librarians are looking at titles holistically, from their archive use to their aggregate use and their subscription use to determine where the best value of use is occurring. Again, this is a growth area for intermediaries. In these cases, we need more than simple cost-per-use figures added into our subscription reports from intermediaries. We need to know what the impact factor, Eigenfactor AI, and/or SNIP is for each subscription. We need to know which aggregator package the title may also be included in and what the embargo is for that title within the aggregation, and we need to look at the archive usage separate from the current subscription usage. The librarians undertaking these types of studies are constructing elaborate spreadsheets to make these comparisons locally and to help determine where the best investment of collection expenditures should be made. At this time, very few intermediaries are supplying this type of information to libraries, but again, if this can be built into their systems, it should be because this is part of the performance-based budget model being used in libraries today.

Librarians would love to have the ability to link data from an intermediary's data system into local data systems and data management tools being used locally. We definitely need all the intermediaries using ONIX standards and EDIfact standards to insure seamless transfer of both subscription claims and invoicing. When we call up an internal service agent, we need to be speaking to someone who fully understands and comprehends the environment in which librarians work and does not appear baffled or befuddled by proxy services, OpenURL questions, or hosting service issues. If the intermediary's title system can allow it, librarians would love to have a local data management space that is more free form and open for trying to configure the intermediary's data in a localized way that works best for librarians. APIs that allow us to create a data bridge directly to a discovery system and/or ILS or other homegrown systematic management tool would also make it easier for us to slice, dice, and serve data in the myriad of ways we need to for various audiences and various stories we tell about the library locally.

Lastly, the future of intermediaries depends on services that are fully open to consortia. Consortia partners need to be able to share data readily with other libraries and with the consortia managers. Each consortia library needs to have the flexibility to choose the intermediary of their choice or use multiple intermediaries as necessary. At the consortia level, being able to recognize what is held collectively and what is held locally is also a key component needed, and, along with this, being able to get usage information for both the consortia collectively and the individual institution is a must-have service. Consortia managers are especially in need of seeing cost information from multiple providers and being able to choose the best provider for the group as needed.

In conclusion, the modern intermediary should improve on current services being offered regarding journal transfer and subscription management and make sure service agents are well-versed in the library environments they serve. In addition, the modern intermediary should begin to develop new services around local publishing, subscription evaluation, data inter-operability, and consortia services. Intermediaries making improvements such as the ones noted above will continue to be a valued service to the academic library in the 21st century.

against the grain people profile

Jill Emery

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BORN AND LIVED: Born in Tucson, AZ and lived all over as an air force brat; formative years spent in Texas.

EARLY LIFE: The early part of my life involved quite a bit of traveling in Europe and exploring various places. The formative years of my life were spent exploring Texas.

PROFESSIONAL CAREER AND ACTIVITIES: I'm fairly active on social media, especially at conferences where I try to present relevant content via Twitter. I've developed a strong knowledge of scholarly publishing and electronic resource management and utilize this knowledge daily in my position as the Collections Librarian at **Portland State University** and as a member of the **Orbis Cascade Alliance's** Collection Development Management Committee Steering Committee. I write a quarterly column for *The Charleston Advisor* and publish regularly.

FAMILY: One wonderful daughter and a fantastic husband.

IN MY SPARE TIME: I like to ride my bicycle and spend time in the numerous parks in Portland with my daughter.

FAVORITE BOOKS: I have favorite authors such as **Haruki Murakami**, **Jeanette Winterson**, **Alain de Botton**, and **Roberto Bolano**.

PET PEEVES: People who cannot center themselves or listen attentively to others.

PHILOSOPHY: Have a good time, all the time. (quote from Spinal Tap, the movie).

MOST MEMORABLE CAREER ACHIEVEMENT: Teaching a three-day workshop on electronic resource management in Abu Dhabi, United Arab Emirates.

GOAL I HOPE TO ACHIEVE FIVE YEARS FROM NOW: The development of a new cost model for scholarly publishing that incorporates open access provision to content.

HOW/WHERE DO I SEE THE INDUSTRY IN FIVE YEARS: Librarians are at a place in scholarly publishing where changes are occurring at an ever-increasing pace from new formats developing out of digital humanities to the management of institutional scholarship. Librarians will be the crux of helping to develop, fund, and manage the new forms of scholarship that are emerging and the systems that will be used to facilitate access and discoverability of these resources. It is a very exciting time in our field, and librarians are showing that we can and will help facilitate these new models of scholarship as they develop.

Author's Biography

Jill Emery has over fifteen years of academic library experience at various higher education institutions in North America. She has served as chair of the **ALA**-ACTS continuing resources committee (previously the serials section) and is a past president of the North American Serials Interest Group. She is the social media specialist for the Electronic Resources & Libraries, LLC and serves on the program planning committee for the annual conference. She is a current member of *The Charleston Advisor* editorial board and the columnist for *Heard on the Net*.