

In August 2016 SFU announced that the reSearcher suite of software will be decommissioned as of August 31, 2017, and the CUFTS Open Knowledgebase will no longer be updated as of May 2017.

In light of this announcement, the BC ELN Steering Committee reSearcher subcommittee conducted a needs assessment for BC ELN libraries that use reSearcher tools to determine the service gaps that will be created and what options libraries are considering, or would consider, to fill those gaps.

The results of this needs assessment are summarized below, with full responses listed by institution in the appendix. These results along with other information gathered by the reSearcher subcommittee will be presented for discussion at the BC ELN Steering Committee Business Meeting on November 21st.

Number of Responses:

18 BC ELN partner libraries responded, including:

- 15 out of 17 BC ELN non-COPPUL libraries
- 3 BC ELN COPPUL libraries

Responses were received from all 16 BC ELN (COPPUL and non-COPPUL) libraries that indicated on the 2015 BC ELN Resource Sharing survey they used reSearcher tools.*

Context

BC ELN recognises resource sharing among partner libraries as one of its core services. Historically, BC ELN has funded the costs of the reSearcher Software Suite for its non-COPPUL partner libraries (budgets permitting) since the Suite's development. The reSearcher suite consists of the following open source products for locating and managing electronic information resources:

- CUFTS Open Knowledgebase
- CUFTS Journal Database (CJDB): A-Z Journal list
- CUFTS: Open Source Serials Management (ERM)
- GODOT: Open Source Link Resolver

The reSearcher suite is currently used to varying degrees by 13 BC ELN libraries and 3 BC ELN / COPPUL members.

As part of the 2015 renewal, BC ELN undertook a review of reSearcher for several reasons: a desire to understand what the future might hold for reSearcher; budgetary pressures which raised concerns about the sustainability of BC ELN's support; and the changing resource sharing landscape. The BC ELN Office conducted a survey of partner libraries and follow-up phone calls with 12 libraries to ascertain usage of reSearcher suite tools. Findings from the investigation were presented to the BC ELN Steering Committee at the July 8th meeting.

During the July 8th Steering Committee discussion on reSearcher, a subcommittee was formed. The subcommittee, consisting of Ross Tyner (Okanagan College) and Shirley Lew (Vancouver Community College), was given a mandate to analyse the market for reSearcher alternatives, meet with SFU reSearcher representatives, and report back to the Steering Committee.

*Of the 18 libraries that responded to the needs assessment, 8 are EBSCO EDS subscribers.

Q1. What options are you considering/would you consider in light of reSearcher shutting down as of August 2017?

Summary of Responses:

Replacing **Link resolver/A-Z/Knowledgebase** functionality:

- 12 libraries indicated they are either using or are considering using EBSCO EDS or Full Text Finder*
- 3 libraries are considering OCLC Worldshare Collection Manager
- 3 libraries are looking for direction from BC ELN or CPSLD
- 2 libraries are just at the beginning of their investigation, but are open to commercial, hosted options such as Exlibris
- 1 library is using Innovative tools

Of the 5 libraries that specifically referred to **Electronic Resource Management** functionality:

- 2 libraries are considering Libguides as a public-facing solution
- 1 is switching to Innovative's ERM
- 1 is considering local hosting of the CUFTS ERM
- 1 library is unsure whether they will seek a solution

Key Themes:

- Majority of libraries are considering using a commercial solution ranging from EBSCO to Exlibris.
- Only three libraries indicated that they are looking direction from BC ELN or CPSLD.
- ERM functionality is not being used by the majority of libraries, mentioned by only 5 respondents.

Q2. reSearcher offers a unique set of services: CUFTS ERM, GODOT Link Resolver, Open Knowledgebase, CJDB A-Z. If you are evaluating replacement systems, what key service gaps, if any, have you identified that will be lost?

Summary of Responses:

- 8 identified link resolving
- 6 indicated ERM functionality
- 5 identified the A-Z and shared knowledgebase
- 4 identified the ILL functionality
- Other losses mentioned by 1 or 2 libraries included:
 - ability to display license terms publically
 - local support with knowledge of BC consortial packages
 - CUFTS open access collections
 - Resource Comparison tool and CUFTS Journal Search

Key Theme:

Link resolving was most commonly identified as the key service gap.

Q3. SFU has announced that they will stop updating reSearcher at the end of May 2017 and stop supporting it altogether at the end of August 2017. What concerns, if any, do you have about the proposed timeline?

Concerned About Timeline:

- 10 libraries indicated they were concerned about the timeline

Key Rationales:

For the 10 libraries that **expressed concern** about the timeline, the most frequently cited reasons were:

- Amount of staff time needed to evaluate, select and implement alternatives while managing the impact on other systems
- 7 libraries specifically indicated that an extension beyond the May/Aug 2017 timeline was desired.

Not Concerned About Timeline:

- 8 libraries indicated they had no concerns about the timeline

Key Rationales:

For the 8 libraries with no concerns about the timeline:

- 4 are EBSCO EDS subscribers
- 1 has an identified alternative solution (Innovative)

Q4. Are you interested in BC ELN pursuing options for community-supported solution to the services reSearcher offers?

Responses:

- 14 = Yes
- 3 = No
- 1 = N/A

Q5. Why or why not?

Summary of Responses:

- 13 libraries expressed support for a consortial licensing of a solution
- 3 already have solutions in place (EDS, Innovative)
- 1 library expressed support for consortial hosting, if possible

Common Themes:

- Majority of libraries support a community-supported approach to finding solutions if possible.
- Advantages to a consortial approach mentioned:
 - Cost-sharing to bring costs down for individual libraries
 - Shared expertise and knowledge
 - Shared technical support
 - Ownership of the solution

Q6. What amount of funding could your institution see putting towards a collaborative venture? This is only a question of interest, no commitment is being asked.

[NOTE: This question only displayed if respondent answered "Yes" to Q4.]

Summary of Responses:

Of the 14 respondents who were presented with this question:

- 7 = Open to discussion
- 6 = Less than \$3,000
- 1 = Less than \$5,000

Common Themes:

- Most libraries do not have more than \$3,000 to put towards a collaborative venture.
- Funding contributed depends on nature of solution, and cost of non-collaborative solution.

Appendix: Detailed Responses

Q1. What options are you considering/would you consider in light of reSearcher shutting down as of August 2017?

| Institution | Response |
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| Camosun College (EDS subscriber) | Although we haven't had time to fully explore the options, we are considering the following: Link resolver: EBSCO/EDS; (haven't explored costs of other options at this time) CJDB (Journal A-Z): EBSCO ERM: ??? |
| Capilano University | Installing Innovative's ERM. |
| College of New Caledonia | Hope that reSearcher users as a group will evaluate other services and suggest alternatives. (I understand reSearcher is an older platform and we probably don't want to manage/upgrade it ourselves.) |
| College of the Rockies (EDS subscriber) | GODOT Link Resolver |
| Douglas College (EDS subscriber) | We don't use reSearcher tools that much. For us, it doesn't really make any difference that it is shutting down. To be honest, I am quite glad that we won't be using GODOT anymore. |
| Emily Carr University of Art + Design (EDS subscriber) | I have not had a chance to explore many options or survey what others use for these services. CUFTS ERM - don't know, maybe continue using EXCEL for managing the licenses and see if LibGuides can do the public display GODOT - no idea though someone mentioned that EBSCO Discovery can provide a link resolver Open Knowledgebase - really going to miss this CJDB A-Z - switch to EBSCO Discovery A-Z as an option |
| Justice Institute of BC (EDS subscriber) | None. We currently only use GODOT to advise our users of alternate location where they may locate the item. We like GODOT, but do not know of other options available. |
| Kwantlen Polytechnic University | We are looking at several vendors beginning in November – Ebsco, Exlibris/Proquest, OCLC, and we are reviewing capacity within Libguides. |
| Langara College | We may replace GODOT with LinkSource (EDS). The only things we actively use are GODOT and the Open Knowledgebase (but they are very useful). |
| North Island College (EDS subscriber) | BC ELN license of comparable suite; activating EDS link resolver, undecided |

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| Northern Lights College | I am hoping that CPSLD or ELN can come up with a substitution before then. It will set us back to the dark ages for providing customer service if we can't find a substitute |
| Northwest Community College | We are investigating commercial options (e.g. EBSCO Full Text Finder, LibGuides by Springshare). We would consider a community-supported solution. We would consider local hosting of the ERM, but haven't consulted our IT department about its feasibility. |
| Okanagan College (EDS subscriber) | Ebsco Full Text Finder, and related Ebsco tools |
| Selkirk College | We are looking to ELN to provide direction. We need to replace the services offered by reSearcher. |
| Trinity Western University | Probably look at EBSCO Full Text Finder and OCLC A-Z link resolver. |
| University of the Fraser Valley (EDS subscriber) | Looking for a commercial, hosted option from a major vendor. We realize we may not be able to find a single product that does everything that the reSearcher suite does. We are just starting to identify our want lists, and haven't started investigating possible vendors. We are interested to see what work the ELN committee will be doing. |
| Vancouver Community College | We are considering any options available. Right now we are considering, EBSCO EDS or hoping that CUFTS/GODOT will be hosted by someone. |
| Yukon College | OCLC WorldCat discovery service |

Q2. reSearcher offers a unique set of services: CUFTS ERM, GODOT Link Resolver, Open Knowledgebase, CJDB A-Z. If you are evaluating replacement systems, what key service gaps, if any, have you identified that will be lost?

| Institution | Response |
|---------------------------------------|---|
| Camosun College | <ul style="list-style-type: none"> -ERM system – we have devoted considerable time into implementing the CUFTS ERM recently, and losing it will have a significant impact on workflow; the cost of alternatives may also be prohibitive and we have not yet explored other options -Shared knowledgebase -Vendor neutrality -Open access collections (esp. Canadian resources) -Local & responsive support (understanding needs of B.C. institutions) -Collaborative environment, partners |
| Capilano University | to early to say as we don't have sufficient knowledge of the ERM product. |
| College of New Caledonia | All of the above are useful/"necessary" - I am guessing that the knowledgebase will not be easy to replicate - tailored to our instructional focus to a great degree, will miss it. |
| College of the Rockies | GODOT Link Resolver |
| Douglas College | We won't be losing anything. We are using Ebsco Full text finder for our knowledge based. We will replace the GODOT link with our ILL form. We use open source ERM for keep information about the databases. |
| Emily Carr University of Art + Design | I have not evaluated any other services yet. |
| Justice Institute of BC | We are not evaluating a replacement system. But, we would be interested if there is a GODOT replacement. |
| Kwantlen Polytechnic University | <p>The largest gap I can see is with the requesting service within the Godot link resolver. Most link resolvers do not also act as ILL requesting software. However, we moved off the Godot forms about a year ago when Relais upgraded their web forms and now only use Relais for locating and requesting. So now, the only gap we would have is that Godot displays holdings at BC institutions for the user to see, whereas we won't expect to get this with other products. I don't know if this will actually have a bearing on the user though. I think that would be difficult to gauge. If you are using Godot as a requesting agent in addition to a link resolver, you would have a wider gap than we will. With the availability of Outlook, I'm assuming many institutions would shift that way if they haven't already for their ILL management software.</p> |

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| Langara College | <p>The biggest loss / gap will be the GODOT link resolver. Other products don't cross-walk in the same way with library databases and Google Scholar. GODOT also supplies ELN member holdings information, which is very helpful for ILL staff placing requests--other link resolvers don't do this. We have a strong interest in an effective link resolver, going forward.</p> <p>The CUFTS Open Knowledgebase is also affected by the above. The Open Knowledgebase CUFTS Journal Title Search is also useful for journal searching, for example in identifying databases and sources that index and provide full-text for journals. Our serials librarian also uses the CUFTS database title list comparison tool.</p> |
| North Island College | CJDB A-Z (journal count, links to database holdings), OLOL linkages and ILL function |
| Northern Lights College | CUFTS, GODOT Link Resolver, CJDB will all be lost. I don't believe we have Open Knowledgebase. |
| Northwest Community College | <p>Re GODOT's facilitation of ILL requests</p> <p>I don't yet know how we would replace this function.</p> |
| Okanagan College | <ol style="list-style-type: none"> 1. ILL requesting 2. ERM system 3. Ability to display license information in A-Z list (less important than 1 and 2) |
| Selkirk College | <p>We need to replace all of these services. We use the CUFTS ERM primarily for the CRDB (research databases). It is our method for making our databases available to our users. GODOT is the only link resolver we are using. We use it to indicate whether an article is available: 1) in print in the Library; 2) via another database; 3) via interlibrary loan. We have a link to our CJDB A-Z off of our homepage. Users can search to find out whether we have access to a particular serial (journal, magazine, newspaper) either in print or online. We also use the Cufts Journal Search http://cufts2.lib.sfu.ca/MaintTool/public/search/ to determine where a particular title is indexed (what database).</p> |
| Trinity Western University | If we went with the OCLC product we would also need to subscribe to another OCLC WorldShare product (e.g., their license manager). |
| University of the Fraser Valley | <p>Based on preliminary investigations, we think these might be gaps in what commercial products might do. The ability to create and link license terms at the journal title and database level, in a publicly available way. Ability to create custom journal lists (custom resource packages). Great customer support, with local knowledge of our consortial packages. Ability to search for books/chapters (?)</p> |

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| Vancouver Community College | <p>In summary, these services include:</p> <ul style="list-style-type: none"> - link resolving - KB - Journal A-Z - ERM <p>Of these services, most of the available services are either out of our budget (OCLC), or strongly bound to the vendor's LMS solution (Alma, Sierra, etc.)</p> <p>In the open source realm, there is an alternate ERM, CORAL but it does not include KB or Link Resolver. An open source KB called GoKB exists, but it's not ready for production, and does not include link resolving which is a core piece.</p> <p>Currently, we will need to replace all of those functions.</p> |
| Yukon College | <p>Our institution is accustomed to the look and feel of the ReSearcher product.</p> |

Q3. SFU has announced that they will stop updating reSearcher at the end of May 2017 and stop supporting it altogether at the end of August 2017. What concerns, if any, do you have about the proposed timeline?

| Institution | Response |
|---------------------------------------|---|
| Camosun College | Staff time is one of our biggest challenges, and this timeline leaves very little time between busy semesters to not only investigate alternatives but to make the switch. Planning for a major project involving multiple systems will strain our already limited resources. |
| Capilano University | should be fine. |
| College of New Caledonia | Give the complexity of this service, I would really argue for an extension. It affects so many different systems (e.g. "Where can I get this?" to individual permalink subject/title lists we have distributed to faculty, lots to "replace"!) |
| College of the Rockies | I think we have plenty of time to find an alternative. |
| Douglas College | We don't have any concern. |
| Emily Carr University of Art + Design | It is extremely short for us, we have had many challenges this year and they will continue well into 2017 - building a new campus and moving the library summer 2017 - literally have no time for researching for new replacements for reSearcher - as well we have had a big staffing upheaval and are short of librarians on top of the move. |
| Justice Institute of BC | None |

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| Kwantlen Polytechnic University | We hope to make a shift by May if not June. Once the knowledgebase is no longer being updated, I think that is when an institution needs to migrate so we are using May as the drop dead date. It will be a rush to actually do the migration; but regardless, I think the lead time is ok. It might be a little tricky within budget years as we are in the budget request phase right now; but at least you can get an indication of costs from vendors at this point. Migrations are never fun so even if the deadline was extended, it would just be putting off the pain. We'd rather just get it resolved before the summer hits so are ok with this timeline. |
| Langara College | This timeline gives us the opportunity to shop around, and ties into to our investigation of other options. This will, however, impact the work load of our interlibrary loan staff, Electronic Resources Librarian and others, particularly when CUFTS goes offline. |
| North Island College | Very tight timeline for evaluating alternative products and processes. More lead time is needed. |
| Northern Lights College | If a good substitute can be found before the deadline, the proposed timeline is fine. However, if one can't be found, we will need more time. |
| Northwest Community College | We don't have any concerns. |
| Okanagan College | More time would give us a better opportunity to more fully evaluate Ebsco and other options and to make an informed decision. We feel we are being rushed into a decision |

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| Selkirk College | Longer would be better. We can make the current timeline work if there is good support from ELN for choosing an alternate service provider. We would need to make the transition in the spring in order to be ready for the fall 2017 academic year. |
| Trinity Western University | It seems like a long period of time but the actual switching to another service/product is also an extended process ... not sure that the May/August dates are enough. |
| University of the Fraser Valley | The selection, installation and populating of the new data will be time consuming. We also need to budget for additional costs (likely). Having this done by May 2017 is a concern. If we have to reconfigure ILL to work with Relais, create a new public display of license info. etc this takes lots of time. We have limited staffing resources to accomplish a project of this scope. |
| Vancouver Community College | This timeline is very concerning. Much of the value of reSearcher is the maintained KB. There are only 8 months before May, or 11 months before August, which may not be enough time to hire someone to maintain a new KB, and to handle the handoff from SFU. There are also questions about the codebase for CUFTS/GODOT -- currently SFU hosts this on its servers, will these servers be shut down? I have not heard of plans to move this to GitHub or some other service like that. And who will maintain the codebase? |
| Yukon College | The support timeline gives fair notice. |

Q4 & Q5. Are you interested in BC ELN pursuing options for community-supported solution to the services reSearcher offers? Why or why not?

| Institution | Yes/No | Comment |
|---------------------------------------|--------|--|
| Camosun College | Yes | I'm not entirely sure if by "solution to the services..." you mean replacement (different services) or alternative hosting options. We would love it if ELN could "simply" take over the services SFU has been providing - hosting, support, knowledgebase etc. The cost of alternatives to the CUFTS reSearcher suite of tools is prohibitive, and smaller institutions with limited staff and budgets will be most heavily impacted. |
| Capilano University | N/A | Our plan is to form a group with other Innovative PSE's to implement ERM together, so not really. |
| College of New Caledonia | Yes | Not sure, see software note in the first box above: Hope that reSearcher users as a group will evaluate other services and suggest alternatives. (I understand reSearcher is an older platform and we probably don't want to manage/upgrade it ourselves.) |
| College of the Rockies | Yes | It will be shared service and hopefully more affordable for us. |
| Douglas College | No | We have all the tools in place already. |
| Emily Carr University of Art + Design | Yes | We are too small for going this alone |
| Justice Institute of BC | No | We do not use the full researcher suite as we have EBSCO EDS which serves our needs well. Again, however if there is a GODOT replacement or community supported solution, we would be interested in that (GODOT). |

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| Kwantlen Polytechnic University | No | It will be very difficult to keep the knowledgebase updated between many institutions. I think it would extremely tough to coordinate. I would expect there were several positions dedicated to this at SFU and I'm not sure how we could take this on between institutions. I am all for collaboration, but I think in this case it would not work. I also think there would a need for tech support, especially for godot which I'm assuming SFU would not be in a position to supply; that alone I think makes the project almost impossible from a community aspect. And ongoing maintenance including updating software – especially Godot seems very difficult to support technically and I think requires a complete code update in order for someone other than Kristina to support. I don't think we have the resources at KPU to contribute what it would take for Researcher to remain active. I think Researcher has served us very well, but only because we had a maintenance contract with SFU. Once that aspect has disappeared, I think it will be too difficult for the suite to remain valid for KPU. |
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| Langara College | Yes | Yes, but we are not really interested in an ERM (we already have one). With an A-Z list we are interested in a list with the very best, most accurate data, and with a community-supported option we'd be able to see other institution's holdings, which would be useful. Having all ELN partners using the same link resolver and knowledge base would be ideal, whether home-grown or not. |
| North Island College | Yes | Consortial advantages, potential for common solution for post-secondary libraries |
| Northern Lights College | Yes | We can't do this on our own. As a tiny community college, with a limited budget, we are hopeful that BC ELN can find options that will work and also be financially feasible as a Consortium. |
| Northwest Community College | Yes | Its feasibility is worth considering. We're satisfied with reSearcher's services. |
| Okanagan College | Yes | We believe there are advantages to a shared knowledgebase, shared technical support, shared costs, and owning our own solution. |
| Selkirk College | Yes | YES! We are a small library. We do not have the capacity to investigate and evaluate alternatives ourselves. |
| Trinity Western University | Yes | Having a number of BC ELN institutions using reSearcher was great ... once again having an opportunity to share knowledge and experience would be wonderful. |
| University of the Fraser Valley | Yes | The Researcher customers will all be in the same situation that we are in, so a joint effort makes sense. |
| Vancouver Community College | Yes | A consortial approach will keep costs down, and our funding will help other libraries. |
| Yukon College | Yes | As a consortium, I believe there would be expertise and buying power advantages to each library going alone to find solutions |

Q6. What amount of funding could your institution see putting towards a collaborative venture? This is only a question of interest, no commitment is being asked.

| Institution | Amount | Comment |
|---------------------------------------|--------------------|--|
| Camosun College | Less than \$3,000 | |
| Capilano University | | |
| College of New Caledonia | Less than \$5,000 | |
| College of the Rockies | Open to discussion | |
| Douglas College | | |
| Emily Carr University of Art + Design | Open to discussion | We don't have any funding for this but could request it for next budget year |
| Justice Institute of BC | | |
| Kwantlen Polytechnic University | | |
| Langara College | Open to discussion | The funding we have available will be a function of how much we have to spend replacing software from the reSearcher suite. |
| North Island College | Less than \$3,000 | NIC would be able to commit 1000.00 or less (but that wasn't an option), which is our current financial commitment for CJDB |
| Northern Lights College | Open to discussion | |
| Northwest Community College | Less than \$3,000 | |
| Okanagan College | Less than \$3,000 | The amount we would contribute depends on the services being developed. We might be willing to contribute more money up-front for development, and a smaller amount for ongoing support. |
| Selkirk College | Less than \$3,000 | |
| Trinity Western University | Open to discussion | |
| University of the Fraser Valley | Open to discussion | We are just at the beginning of the decision making process. This is a vital service/function for our library, so we realize we have to set aside adequate funds for it. We don't have a sense right now of costs for commercial options. We are just starting to have budget discussions for next year. By collaborative venture, do you mean a consortial license for a commercial product? Or something else? |
| Vancouver Community College | Open to discussion | Will depend on the services offered, for example, will someone be maintaining the KB? Will the code base be updated and new features added? |
| Yukon College | Less than \$3,000 | It would be great if we could find some kind of collaborative solution. |