



Common Suite Facilitated Session Summary Report

**BC ELN All Partner Meeting
November 21, 2016**

**Compiled by
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Overview

The following summary report presents the outcomes of the common resource suite facilitated session, which occurred during the BC ELN All Partner Meeting on November 21, 2016. Key information was transcribed from flipcharts and notes generated during the session. Peter Abrams was the group facilitator and co-designer of the session.

The results of this meeting will inform the investigation into a common resource suite for all BC ELN partner libraries.

Purpose & Objectives

The session's purpose was to provide an open and supportive space for partners to contribute to designing a framework for the investigation of a common suite and hear each other's view points.

Objectives for the day included:

- Identifying significant benefits and concerns related to a common resource suite
- Determining key issues and ideas to explore during the investigation into a common suite
- Determining principles to guide the investigation

For session details including agenda, participants, and process, see Appendix A.

Session Results

Plenary discussion results ("top" choices among all participants) are identified below. Individual table results are listed in Appendix B for reference.

Objective 1 Plenary Results

Key Benefits of & Concerns for Licensing a Common Resource Suite

Top benefits:

- Financial savings
 - Provides cost savings on content and in staff time
- Shared experience and content for students across the province
 - Supports student transfer and provision of shared library services, e.g. AskAway
- Demonstrating a successful model of collaboration to stakeholders
 - Substantiates BC ELN's "reputational value" which can be leveraged for future initiatives

Top concerns:

- Resource relevance
 - Licensed resources must support Partner Libraries' curricula
- Resource impact and integration with services
 - How resources impact collaborative services, e.g. AskAway, and integrate with discovery services, including EDS and Summon
- Fair, transparent, and stable pricing model
 - Models used should be clear, rational, and fair while safeguarding libraries against risk as much as possible (i.e., currency fluctuation)
- Flexibility
 - Multi-year, multi-resource; single vendor agreements limit the ability of individual institutions to respond to budgetary pressures

Objective 2 Plenary Results

Key Issues to Consider

- Transparent vendor pricing and cost sharing models
- Benefits to individual institutions as well as the post-secondary system as a whole
- Creative licensing models
- Assessment of resource value
 - include usage analysis of current common resource suite
 - develop models for future assessment of a common suite that includes the value for institutions and the value for provincial post-secondary education (“common good”)
- Compatibility with discovery layers

Objective 3 Plenary Results

Principles to Guide the Investigation

Top principles:

- Work of the investigation will be performed by the BC ELN Office with oversight provided by the Steering Committee
- Steering Committee oversight will include the following activities
 - Establishing clear guidelines for the investigation, including timeline with reporting schedule
 - Monitoring adherence to the guidelines
 - Providing guidance as needed
- A final report will be produced and will include:
 - Costs
 - Multiple options for a common resource suite (expanding beyond content to include technologies or services)
 - A recommendation proposed by the Steering Committee
 - A description of the process used to come to this recommendation
 - The impact of the recommended option on other resources and services
 - How the recommended option provides the common top benefits and addresses the common top concerns, issues and ideas identified

Other Ideas:

- Use an analysis of the existing common suite as a foundation for the investigation
- Consult with collections and technical staff at partner libraries as needed
- Connect with other consortia about common resource suites and pricing models used in their jurisdictions
- Acknowledge that at the end of the investigation it may be determined that there is no viable option that meets the needs of all partner libraries

Appendix A: Facilitated Session Meeting Details

BC ELN All Partner Meeting Participants

36 people took part in the session, representing BC ELN partner libraries and staff. Partners who were unable to attend were given the opportunity to contribute via telephone interviews with the facilitator prior to the meeting.

- Anne Andres, *Columbia Bible College*
- Sheldon Armstrong, *University of British Columbia (Alternate)*
- Tim Atkinson, *Vancouver Island University*
- Jonathan Bengtson, *University of Victoria, Chair*
- Gwen Bird, *Simon Fraser University*
- Andrei Bondoreff, *Ministry of Advanced Education (Alternate)*
- Patricia Cia, *Langara College*
- Gregg Currie, *Selkirk College*
- Ali de Haan, *Acsenda School of Management*
- Linda Epps, *Nicola Valley Institute of Technology*
- Natalie Gick, *Simon Fraser University Officer*
- Ted Goshulak, *Trinity Western University*
- Mary Anne Guenther, *North Island College*
- April Haddad, *Justice Institute of British Columbia*
- Kim Isaac, *University of the Fraser Valley*
- Shirley Lew, *Vancouver Community College*
- Grace Makarewicz, *Capilano University*
- Scott Marsden, *Alexander College*
- Brenda Mathenia, *Thompson Rivers University*
- Adrian Mitescu, *University Canada West*
- Todd Mundle, *Kwantlen Polytechnic University*
- Lisa Petrachenko, *University of Victoria*
- Suzanne Rackover, *Emily Carr University of Art + Design*
- Shahida Rashid, *College of the Rockies*
- James Rout, *British Columbia Institute of Technology*
- Debbie Schachter, *Douglas College*
- Dawna Turcotte, *Northern Lights College*
- Ross Tyner, *Okanagan College*
- Venessa Wallsten, *Quest University Canada*
- Melanie Wilke, *Northwest Community College*
- Allan Wilson, *University of Northern British Columbia*

BC ELN Staff:
 Anita Cocchia
 Sunni Nishimura
 Leigh Anne Palmer
 Cristen Polley
 Brandon Weigel

Agenda for Common Suite Facilitated Session

Time	Agenda activity
10:45	Identify key benefits & concerns related to a common resource suite Identify key issues & ideas to explore in the common suite investigation
12:30	Lunch
1:45	Share results and confirm key issues to explore
2:30	Determine principles to guide the investigation
3:00	Check out

Process

Attendees were seated at 6 tables. To address Objectives 1 and 2, participants were organized into pairs or trios. They interviewed each other in order to gain a deeper understanding and appreciation of different perspectives on issues surrounding a common suite.

At each table, once the interviews were completed, results were shared. Then table members discussed and identified their top 2 - 4 benefits, concerns, and issues to explore related to a common suite.

In plenary, each group shared their top choices. Through discussion and consolidation, top choices for the consortium as a whole were identified.

A similar process was used to achieve Objective 3, excluding the interview activity.

Appendix B: Objective 1 Table Results

Key Benefits of & Concerns with a Common Resource Suite

a. Key Benefits

Table #1

Top 3 benefits

- Relevant resources
- Better priced resources – deeper discounts
- Benefits to students, especially transfer

Additional benefits

- Excellent first point of entry for lower undergrad students
- Saving the system money
- Situates the institution as a partner
- Access to resources otherwise couldn't be considered.

Table #2

Top 4 benefits

- Financial savings, and financial control (cost control and future predictability)
- Continuity of databases between institutions for student success
- Equity of access across post-secondary education
- Saving staff time on negotiation, including expertise

Table #3

Top 2 benefits

- Financial – cost savings; value for spend; impact
- Content all institutions want – 2-year, 4-year

Table #4

Top 3 benefits

- Financial savings
- Broadest and best amount of information across systems for students
- Shows our level of collaboration to government (expertise, leadership, etc.)

Additional benefits

- Flexibility to review common suite periodically – change/respond as needed
- Affordable option for students.

Table #5

Top 3 benefits

- Cost savings
- Staff time savings
- Level playing field across BC

Table #5 continued

Additional benefits

- Content analysis
- Familiarity/transferability
- Foundational/multi-disciplinary
- Ability to leverage forced purchasing to get funding

Table #6

Top 3 benefits

- Cost savings
- Common experience for students and library staff/services (AskAway)
- Something “we” don’t have to think about (staff time savings; no local negotiations required)

b. Key Concerns

Table #1

Top 3 concerns

- Pricing formula – should be fair to all sizes of libraries
- Possibility of losing current discounts (on related products) and relationships if vendor changes
- BC - ELN won’t be open to the idea of not having a common suite after due diligence is carried out during the investigation

Additional concerns

- Resources are relevant to students
- Potential loss of key resources (HBR) to certain vendors only
- System (big picture) benefits are lost due to a major focus on local institutional needs
- Ensure all members understand the premise of a “common suite”
- Budget implications are understood if there’s no “opt-out” option

Table #2

Top 3 concerns

- Cost certainty – guarantee predictable expense (as suite constitutes a large % of budget)
- Lack of flexibility – being locked-in to resources (multi-year) and/or a single vendor
- Overlap of collections – paying two times

Additional concerns

- Lack of flexibility within suite (sub level)
- Needs to be high quality content (show value), and applicable to all
- Integration with other databases, i.e. at the institutional level – discovery, complementary to other resources

Table #3

Top 2 concerns

- Collection relevance to all – don't want to pay for what we don't need, no duplication, etc.
- Long term cost certainty – inflation, exchange rate, etc. License terms

Table #4

Top 3 concerns

- Non-defensible expense, budget and content changes
- Currency fluctuations
- Impact on other services, e.g. AskAway, future services

Additional concerns

- Embargos
- Increase in costs by vendors, e.g. elite to ultra
- Possibility of cancelling other resources to afford common suite resources
- Lack of perpetual access

Table #5

Top 3 concerns

- Relevance of resources
- Relevance of foundational multi-disciplinary in environment of discovery layers and big bundles
- Compatibility with discovery product

Additional concerns

- Content overlap
- Lack of transparency in cost and usage
- Single vendor dominance
- Stability
- Moving students to discipline-specific resources

Table #6

Top 4 concerns

- Required to subscribe to content “not” needed – required participation in general; content/subject areas/vendors
- Equitable pricing policy – on vendor's side there's a lack of transparency; on BC ELN's side there's the structure of the pricing model
- Lack of choice due to ongoing/continuous market consolidation
- Common core must work with other resources, e.g. Discovery Layer

Appendix C: Objective 2 Table Results

Key Issues & Ideas to Explore

Table #1

Top 3 issues and ideas to explore

- Explore new pricing formula – current cost-sharing model is out of whack with regards to FTE
- Be really open to finding new resources/vendors – start big! Possibly use an RFP
- If a different suite of products is chosen, libraries will need long lead times to make transition

Additional issues and ideas

- How to maximize benefits for transfer students
- How to bring together such diverse institutions, encouraging them to work together for the common good
- Final outcomes should have best value for money across the entire system
- Eliminate duplication – some institutions are paying multiple times for same resources
- Explore drivers behind the opt-in/opt-out responses

Table #2

Top 3 issues and ideas to explore

- Comparative value of vendors
- Future orientation – what's on the horizon? Value proposition? Evaluate and re-evaluate
- Flexibility of level of coverage (sub level) – menu of choices

Additional issues and ideas

- Financial viability of development of suite for all members
- Interaction of a common suite with other consortia (i.e. don't buy twice)
- How to address \$US
- Multiple vendors within the suite
- Use of tiers for access to specialized resources
- See model of "Points to the Past" – province-wide authentication (open to all BC residents)

Table #3

Top 4 issues and ideas to explore

- Explore new/different pricing formula – possibility of external (ministry?) funding
- Do different types of libraries need different resources – different licensing models (common spend; common vendors). Where can we be flexible?
- Assessment – period of review; duplication; ROI; who? how?
- How do we support Open Access while meeting libraries needs serviced in a commercial/vendor environment?

Table #4

Top 3 issues and ideas to explore

- Explore licensing non-traditional resources (more kinds of “common technology”) – hosting, streaming, Islandora, etc.
- Create a review process for a new suite
- Explore costing models – examine value in current use products across the sector, e.g. cost per use

Table #5

Top 4 issues and ideas to explore

- Some choice – not 100% common. Alternate model
- Updating model license, e.g. accessibility, copyright, etc.
- Vendor compatibility
- Applicable for both small and large institutions – something for everyone.

Additional issues and ideas

- Analysis of content and usage
- Best possible price
- Multiple vendors
- Different pricing models – tiered on what you would want to take
- Flexibility of pricing options
- Assessment and measuring impact of the suite
- Compatibility/transferability
- Explore through the lens of the BC - ELN strategic plan
- Do we need a common suite?
- Are any resources truly common?

Table #6

Top 3 issues and ideas to explore:

- Neutral related to costs – no significant change in pricing, and “increases” are controlled
- Do we need a common suite?
- Transparency of costs from vendors

Additional issues and ideas:

- How big of a common suite is advantageous (worth it/not worth it)
- Does the suite work with “our” discovery layer?
- Needs to support “shared resources and access” across the province (government mandate/desire)

Appendix D: Objective 3 Table Results

Top Principles to Guide the Investigation

Table #1

- Oversight carried out by the Steering Committee
 - already composed of constituent reps; in its mandate
 - set TOR and reporting schedule
 - constituents view report at conceptual stage (clear statement of viability), and provide feedback and direction
 - actual work done by ELN staff and not volunteer task group
- Produce a report that
 - addresses benefits, concerns, issues/ideas
 - lays out the cost implications for each institution

Table #2

- Have a staged investigation process
 - RFI based on today's discussion
 - Check in with all partners
 - RFP
 - Steering Committee recommendation
- Form a working group from a subset of the Steering Committee
 - heavy dose of Anita or Leigh Anne (ELN expertise)

Table #3

- Oversight carried out by the Steering Committee
 - actual work done by ELN staff
 - call upon experts from Partner Libraries as necessary.
- Produce a report that contains
 - process (a summary of steps taken)
 - vendors/resources considered
 - Terms and Conditions highlights
 - overall price and price/institution
 - options and/or recommendations
 - timelines and next steps
 - assessment/content analysis.

Table #4

- Oversight carried out by the Steering Committee
 - makes most sense
 - collections level team to assist with gathering information.

Table #4 continued

- Produce a report with
 - options available
 - license details
 - how it responds to concerns, e.g. if it negatively impacts Discovery Layer
 - how it addresses benefits to institutions and the post-secondary sector
 - details on the assessment process
- Provide regular updates to Library Directors
- Final decision to be made in-person at an all partners meeting

Table #5

- Establish a working group
 - a sub-committee of the Steering Committee
 - external people to bring particular expertise, e.g. eresources librarian, someone with a statistical background, system librarian
- Produce a report that
 - includes evidence
 - considers the issues and concerns highlighted at all partners meeting
 - presents other alternatives considered
 - brief, and with infographics
 - assesses the impact on other ELN resource negotiations and how that impacts this report's recommendation
- Evidence-based
- Investigation and decision-making processes are transparent
- Considers the common good
- Bottom line is that the investigation and report should ask and answer questions we would ask ourselves for any other product

Table #6

- Working group to carry out the investigation
 - have a combination representation of different types of operational and director-level staff
 - include BC ELN staff
 - keep small (5 - 6 maximum)
 - report to the Steering Committee
- Reach out to constituents
- Be willing to investigate radically different options
- Be open to the possibility of not proposing a common resource suite
- Produce a report that addresses
 - what UFC costs, and other options
 - overall value to institutions and post-secondary system
 - radically different options
 - transparent costs for any options
 - costs and benefits of required common suite vs. a suite licensed by a consortia
 - survey of similar consortia across Canada for pricing models