Doing More with More: I2NY Update

The more seamless the experience for the end user, the more work it takes behind the scenes to build an infrastructure in which many disparate systems play together nicely. This is true for the technology to deliver the services we provide, but it's also true for the organizational infrastructure. That's where I2NY comes in.

Let me begin by explaining what I2NY is. I2NY, or Information Infrastructure for New York State, is an initiative of the NY3Rs Association. The official mission of I2NY is: "To ensure that all New Yorkers have seamless, unfettered, and affordable access to information, through the creation of a New York statewide information infrastructure which encourages collaboration and joint enterprises among the libraries and archives."

A summit was held in the fall of 2012 at which ideas were brainstormed for how libraries of all kinds in New York State could work together to leverage our resources and services in order to "do more with more." This work resulted in a report issued in May 2013 which named 6 priorities, or initiatives, we could take to achieve that goal. Work Groups have been formed to facilitate each initiative. The work groups are:

- Enhancing Access to Research Databases
- Empire State Digital Network DPLA Service Hub
- Communication Clearinghouse
- Library Assessment and Return on Investment
- Library as Publisher
- Staffing Innovations

I will speak briefly about each of the 5 Work Groups with which I am not personally involved, and then I'll go into more detail about the Enhancing Access to Research Databases Work Group.

The Empire State Digital Network/DPLA Service Hub Work Group is drawing together regional digital collections in New York State to create a service hub for sharing New York's historical and cultural heritage. The hub will feed into the larger Digital Public Library of America. This Work Group has a clear 2-phase plan and is already about halfway through the first phase.   Jason Kucsma of the Metropolitan New York Library Council is the facilitator.

The Communications Clearinghouse Work Group is tasked with creating a clearinghouse to share information on initiatives and projects, including new avenues of communication between all library and archive types in New York State. This Work Group has chosen to use a website as the best platform for the clearinghouse. They have begun the planning to implement a process as well as a centralized place where libraries can share information about their projects and collaborations. John Shaloiko of the Southeastern NY Library Resources Council is the facilitator.

The Library Assessment and Return on Investment Work Group has two primary components: Developing learning opportunities to train librarians in assessment techniques and associated activities, and creating a repository/toolkit for libraries working to connect library services to patron and student outcomes. Their first Continuing Education workshop is scheduled for November 5, and they have

begun work on a LibGuides template for the Repository/Toolkit. Mary-Carol Lindbloom of South Central Regional Library Council is the facilitator.

The Library as Publisher Work Group is working to encourage libraries and archives to test the waters as publishers. They have already completed a series of 5 webinars on 4 ways libraries can be publishers. Then, just the other day, they announced a $10,000 Library as Publisher innovation grant opportunity. Kathy Miller of the Rochester Regional Library Council is the facilitator.

The Staffing Innovations Work Group has two areas of interest: competencies needed for today's library staff, and staffing innovations. Their literature review and list of competencies are posted on their wiki: http://i2nystaffing.pbworks.com/w/page/71438210/I2NY%20Staffing and next they will be turning their attention to staffing innovations. Debby Emerson of Central NY Library Resources Council is the facilitator.

The Enhancing Access to Research Databases Work Group was given the top priority among the initiatives. As libraries of all sizes struggle to maintain e-resource subscriptions in times of rising costs and shrinking budgets, this group is charged with finding ways for libraries of all kinds in New York State to collaborate to improve affordable access to research databases and other information resources in order to support research, economic development, teaching and learning. More specifically, we are working to develop tools for making better deals and to create opportunities for leveraging our resources to "do more with more."

Last October, the Enhancing Access to Research Databases Work Group met in Albany, where guest speaker, George Machovec, Executive Director of the Colorado Alliance of Research Libraries, gave us a national overview of successful consortial efforts to leverage access to electronic resources. Using his presentation as a starting point for discussion, the Work Group identified 5 more specific initiatives to help us reach our goal. Task Groups were formed to take action on each of these initiatives.

[Explain hierarchy here]

The 5 Task Groups are:

- Licensing Manifesto Task Group
- Licensing Toolkit Task Group
- Article On-Demand Pilot Task Group
- Library Purchasing Cooperative Task Group
- Industry Analysis Task Group

The Licensing Manifesto Task Group, led by Sheryl Knab of the Western NY Library Resources Council, developed a licensing manifesto which lays out specific terms which all the signers agree to pursue in future contracts. Some of the issues include the omission of confidentiality clauses, the support of fair use, ILL, use in course packs and reserves, data mining permission, COUNTER-compliant statistics and more. The finished manifesto has already been endorsed by a long list of libraries and organizations. You can view and download the manifesto and list of those who have endorsed it on the I2NY website, and there is a place where your institution can endorse it as well if you wish, and we would certainly encourage you to do so.

The Licensing Toolkit Task Group, chaired by John Hammond of the Northern NY Library Network, is pursuing 2 projects. The first is a model license for New York State libraries, designed to work in conjunction with national model licenses, and to align with the licensing manifesto. The model license has been posted on the I2NY website. The second project is a method to aid libraries by increasing transparency in e-resource license terms and prices. The Task Group is developing a tool to survey New York libraries about the terms in their licenses and what they are paying for e-resources. If they can get enough participation, they hope to build a searchable database for libraries to compare their deals with those of their peer institutions. One challenge is that they are working against the confidentiality clauses in many licenses.

I chair the Article On-Demand Pilot Task Group. We have prepared an RFI document for a pilot project to provide "a la carte" on-demand access to non-subscribed journal articles at affordable consortial prices. Our group is pleased to have Peter McCracken, one of the founders of Serials Solutions, on board, as he brings a valuable vendor perspective to our planning. We are on track to send the RFI out to 7 selected vendors this coming week.   We'll see who is interested and who might be able to meet our needs, and then we'll negotiate the actual pilot. A long term goal is to foster the creation of an a la carte article purchasing platform with prices scaled to meet individual library budgets and content from across a wide array of providers. We are also thinking about looking into e-book on-demand options further down the line.

The Library Purchasing Cooperative Task Group, chaired by John Hammond, has more irons in the fire than any other group. I am also a junior member of this group. We are pursuing a partnership with SCORE (SLS Consortium of Online Resources for Education) to create a platform on which libraries of the same type share pricing information. This project looks quite feasible. The group is also investigating setting up the NY3Rs as a billing agent or aggregator for state contracts, not as a competitor to WALDO, but possibly for under-served subject areas and small e-resources currently purchased directly from vendors.   Another small sub-group is looking into what it would take to and what would be the benefits of altering purchasing thresholds for state schools. The Task Group is also investigating more options for purchasing e-books. To aid the work in that area, I produced an in-house draft document of e-book purchasing model options. Finally, the group looked into building out on NOVEL, SUNY and CUNY contracts, but that was a no-go.

The Industry Analysis Task Group was chaired by Shirley Bower of RIT. This group studied what can be learned about e-resource vendor profit margins. Jen Freer produced an Industry Analysis Report which outlines a process for reviewing available financials, operations and information from other customers about any given vendor with whom a library might be negotiating an e-resource purchase. The purpose is to do what we can to make vendor pricing more transparent, and use that information in license negotiations. This very interesting report is also available on the I2NY website.

One thing I noticed as I reviewed the work of these 5 Task Groups is that 3 of them are grappling with the issue of transparency in pricing from one angle or another: The Licensing Toolkit Task Group is creating a survey tool to gather information on e-resource licenses, including prices, for libraries to share with each other.   The Library Purchasing Cooperative Task Group is working with SCORE to build

a platform on which libraries of the same type can share pricing information. The Industry Analysis Task Group has outlined a way for libraries to try to get closer to seeing any given vendor's profit margin. I think that has to do not only with shrinking budgets (which have been with us some time now), but also with the impact of open access and the significant changes happening right now in academic publishing. This long-standing environment is going through major upheaval; the models are all changing; publishers are understandably nervous and librarians are not just watching to see what will happen, but pressing to move things in a better direction, if we can figure out what that is and how it will work.

I don't want to go too far afield with that train of thought; I am no expert on open access and the changing environment in academic publishing. Like most of us I am watching the situation with great interest to see how it will impact our work. But the changes happening in publishing right now are part of the picture that has led so many of us to be concerned about transparency in pricing, and about working together to leverage our resources (fiscal, human, knowledge, technological) to increase and improve both services and information we can provide to our patrons. Each I2NY Work Group is coming at the question from a different angle, but we are all striving to work more efficiently together to provide support for research, economic development, teaching and learning for the patrons and citizens of New York State. But we need your help. We invite any of you with interest in these initiatives to join us. You can start by contacting the facilitator of the Work Group in your area of interest. With more of us working on more projects and initiatives, we can have a significant impact – together we can "do more with more."