Content Strategy Committee
April 2015 - March 2016
Report to the Annual General Meeting

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Submitted by
Todd Mundle, Kwantlen Polytechnic University
Chair, Content Strategy Committee (CSC)

The CSC Annual Report is organized according to the following categories:

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1. Content Program

2015 Renewals
The CSC contributed to CRKN's strategic objective of supporting, strengthening and evaluating existing licenses by finalizing and renewing the license agreements that terminated at the end of December 2015. Throughout the January 2016 to March 2016 period, the CSC also worked proactively by drafting initial negotiation objectives for licenses that expire at the end of 2016. This work included a set of member teleconferences to discuss the negotiation objective setting process, and the specific issues with the upcoming Taylor & Francis renewal.

Licenses renewed in 2015:
- American Chemical Society – Web Editions & Legacy Archive
- American Mathematical Society – MathSciNet
- ARTstor – Shared Shelf
- Cambridge University Press – Journals
- Elsevier – Scopus
- Gale – Times Digital Archive
- Institute of Physics – IOP Journals
- Oxford University Press – Journals
- Royal Society of Chemistry – Journals
- Springer - SpringerLink
- Thomson Reuters – Web of Science and Web of Knowledge

- Wiley-Blackwell – Online Library

Two licenses that expire partway through 2016 were also completed in the January 2016 to March 2016 period:

- ProQuest – Historical Newspapers (Primary and Optional)
- ProQuest – House of Commons Parliamentary Papers

Key Renewal Events:

There were several key renewal events that took place in the 2015-2016 fiscal year:

- **Implementation of Banding**
  The 2015 renewal cycle presented the first opportunity to apply the banding system to license agreements. The four licenses where banding was explored were: American Chemical Society, Institute of Physics, Royal Society of Chemistry, and Springer. These licenses were selected as their pricing was based on a legacy cost-shared model. Under a transitional model, the banding system was successfully applied to ACS and IOP. The system was not fully applied to Springer, but will be used to price new content that comes into the package. Due to other challenges in the negotiation, the Royal Society of Chemistry was not transitioned to the banding system. Although the system was effectively applied to two licenses, changing the pricing model for did prove to be very challenging, and not all members were satisfied with the outcomes, specifically with the Springer agreement.

- **Opt-out clauses**
  At the request of members, CRKN successfully negotiated "opt-out" clauses for several licenses. These clauses allow an institution to discontinue participation in a multi-year agreement in year two or three of the contract. This type of clause allows institutions who are currently unable to agree to multi-year commitments to continue to participate on CRKN licenses, rather than having to decline completely.

- **Decline in license participation**
  Due to various factors, including constrained library budgets and the unfavourable exchange rate between the Canadian and US dollar, CRKN saw a higher than normal reduction in participation on many licenses. Many libraries are undertaking in-depth reviews of their collections and will likely continue to make cancellations as needed.

- **Currency Exchange**
  In an effort to combat some of the effects of currency exchange, CRKN piloted a mechanism whereby annual increases in one of its renewed licenses are increased or decreased dependent on the strength or weakness of the Canadian dollar. CRKN will continue to monitor the effect of this pilot and considering implementing it with other renewals in future, along with investigating other options for mitigating foreign currency risk.

New Content
Following the recommendations of the Content Development Task Group (CDTG), a process was put in place for evaluating general levels of member interest in potential new content opportunities. The process involves standardized forms for submitting content opportunities for both members and vendors, and an informal survey to members to gauge the level of interest in a given product. Since its inception, two of these surveys have been sent to members.

Several new content opportunities were pursued during the 2015-2016 timeframe.

- **American Physical Society (APS)**
  CRKN members identified the APS journals as their first choice for transfer from multiple regional consortia and individual contracts to a national license agreement with CRKN. Preliminary investigation and discussion with APS began in early 2016.

- **Institute of Physics (IOP) Ebook package:**
  As part of the IOP journals renewal, CRKN members were able to purchase a set of 35 IOP ebooks. These ebooks come with perpetual access and no digital rights management (DRM) restrictions.

2. Task Groups

Model License Task Group (MLTG)
Formed in early 2015, the Model License Task Group's mandate was to examine the CRKN Model License and conduct a systematic review in order to make improvements in keeping with the current state of the art of electronic resource licensing. The task group reviewed other model licenses from consortia both in Canada and abroad, and also examined a number of vendor licenses to ensure a broad overview of perspectives.

Direction and feedback from CRKN members was also a strong driving force behind the work conducted by the task group. A survey of members was conducted, as well as a short information session at the 2015 AGM to share progress to date on specific clauses in order to gather additional input. A final draft of the revised model license was shared with members for final feedback in advance of review and approval by the Content Strategy Committee and Board of Directors. The new Model License will be used for new licenses and renewals beginning in summer 2016.

Serials Management Sub-Committee (SMSC)
The work of the Serials Management Sub-Committee continues as publishers become KBART compliant and are better able to deliver accurate title lists to IT library solution providers for CRKN-licensed resources. These lists are essential to provide a clear picture of the entitlements (perpetual and ephemeral collection coverage), as well as providing access to full text content through link resolver systems by linking results found in Google or discovery tools to the articles licensed.

In order to better support CRKN members, two communication mechanisms continued to be leverage this year. The SMSC page provides members general recommendations on activating the collections in different systems, and a list of CRKN collections to be activated

(including the number of entries, and the date of transmission of the list to the IT vendors). Regular updates are also sent on the CRKN Collections listserv.

In addition to the work made on the list, additional efforts were made by CRKN staff to advocate on be behalf of the members to improve the timeliness of the data loading on the IT-vendors' side and to improve the quality of the data provided on the publishers' side.

3. Value Analysis

Journal Value Analytics (JVA)
The Journal Value Analytics Project is in response to member input asking to see more data to help evaluate licensed products. It aims to provide members with information about the quality, utility, and cost-effectiveness of each title for their institution.

Following the feedback received from the last edition of the Journal Value Metrics sent out in July 2015, the 2016 edition of the JVA was sent earlier (in March 2016).

4. Member Engagement & Collaboration

In following the Strategic Plan objective to use multiple communication channels for ongoing member engagement, the following were used by CSC for input and guidance from the members. CSC also engaged with stakeholders outside of the member community.

Member Surveys and Teleconferences
Members engaged in the 2015-16 content program and renewals discussion via 16 member teleconferences held in English and French. The member teleconferences allow staff and the CSC to update members on the progress of renewals and special projects and receive input and feedback.

In early 2016, a teleconference was held in order to discuss the negotiations objective setting process and specific strategies for the Taylor & Francis renewal. This was a new approach to soliciting feedback, which is usually done via survey, and resulted in a useful dialogue with members. The teleconference was followed by a survey in order to obtain additional input from those members who could not attend, and was also an opportunity to receive feedback that was more quantitative than qualitative.

License Information Module (LIM)
The License Information Module operationalizes the Strategic Plan objective of developing tools for content selection and management. During the 2015-16 fiscal year, the offer documents section of the LIM was reorganized in order to lessen the administrative burden of updating license profiles. This new method of displaying offer documents also allows the documents to stay attached to the current profile, so that members can easily consult the documents in the future. Incremental improvements to the LIM are ongoing on a continual basis and a more in-depth review and refresh of the LIM is planned for later in 2016.

Ongoing communications
Members were kept abreast of negotiation developments, task group updates, and other news via several tools: recaps of all CSC meetings, license updates in the CRKN NewsBrief,

and frequent posts to the CRKN collections and directors listservs. In January 2016, CRKN refreshed its social media strategy and has committed to creating a more active presence on Twitter. Since that time, engagement on Twitter has rapidly increased, and followers have grown to over 580, compared to 400 at the same time last year.

NISO & COUNTER memberships
Aiming at extending the services it offers to its members, CRKN is exploring participation as a voting member in two initiatives:
- The National Information Standards Organization (NISO), a non-profit association accredited by the American National Standards Institute (ANSI), which identifies, develops, maintains, and publishes technical standards to manage information in our changing and ever-more digital environment.
- Project COUNTER, an initiative aiming at improving the reliability and usability of online vendor usage statistics. Other consortia in Canada already have membership in this organization (for example, CAUL, OCUL and BCI).

5. Appendices

A. Mandate

The CRKN Content Strategy Committee is established by the Board of Directors as a Standing Committee of the Board, pursuant to section 12 of the Corporations' by-Laws. The CSC is responsible for:

- developing and overseeing systematic means of needs analysis with members, to ensure meaningful consultation with regard to members' priorities, requirements and specifications for the identification, negotiation, implementation and perpetual access of electronic resources;

- maintaining an awareness of developments in the scholarly publishing landscape and potential opportunities to advance members' interests;

- developing objectives, principles, strategies, and specifications for vendor and open access negotiations and license agreements, for recommendation to the Board as appropriate;

- monitoring the execution of agreed-upon negotiations strategies by staff, and assisting/serving as a resource to the staff negotiator(s) according to the objectives established by the Board of Directors;

- evaluating the results of negotiations, and apprising the Board of progress, developments, issues and resulting contract terms achieved through negotiations;

- advising and assisting staff with effective implementation of resulting license agreements and access (including, for example, serials management and perpetual access details);

- contributing strategic insights and operations expertise from members' professional practice to support overall CRKN planning, program implementation and communications;

- working closely with other Committees to ensure alignment of committee objectives with respect to license fees and cost-sharing;

- Apprising the Board and staff of any policy and/or operational issues arising from the committee's work that may require delegation to another group or action elsewhere within the organization;

- Assuming such other responsibilities as from time to time may be delegated by the Board.

B. CSC Members – 2015-2016

The CSC is comprised of 10 members: two designates from each regional consortium for a total of eight, a Chair and a Vice-Chair. For 2015-2016, the members were:

One member of the Board of Directors:
- Todd Mundle, Kwantlen Polytechnic University, Chair

One member for the purpose of assisting with Board reporting and liaison in the absence of the CSC chair:
- Benoit Séguin, Université du Québec à Trois-Rivières (Vice-Chair)

Eight librarians, two from each region, with electronic collections / services and negotiations experience:

Council of Atlantic University Libraries (CAUL) designates:
- Elaine MacInnis, Dalhousie University, Agricultural Campus (to Nov 2015)
- Dianne Keeping, Memorial University of Newfoundland (from Nov 2015)
- Peter Webster, Saint Mary's University

Ontario Council of University Libraries (OCUL) designates:
- Tony Horava, University of Ottawa
- Pamela Jacobs, University of Guelph

Bureau de coopération interuniversitaire (BCI) designates:
- Christine Hiller, BCI (formerly CREPUQ) (to Dec 2015)
- Stephanie Gagnon, Universite de Montreal (from Dec 2015)
- Louis Houle, McGill University

Council of Prairie and Pacific University Libraries (COPPUL) designates:
- Jo Anne Newyear Ramirez, University of British Columbia (to January 2016)
- Denise Koufogiannakis, University of Alberta (from February 2016)
- Lisa Petrachenko, University of Victoria

Staff members Clare Appavoo (Executive Director), Yanick Beaudoin (Member Services & Licensing Officer), Craig Olsvik (Senior Content & Licensing Officer), and Monica Ward (Senior Content & Licensing Officer) served as resource personnel to the Committee.