

Roles in the new information age: the evolution of the super-agent-library partnership.

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ABSTRACT

Libraries traditionally have relied on their subscription agents to assist in the acquisition process for scholarly journals, multi-media titles, and recently even CD-ROMs. This relationship should be no different when the product desired is an electronic journal.

Although some academic and research libraries have begun to incorporate the world of electronic publishing into their collections, many public and college libraries are just beginning to approach this challenge. As a result, the role of the subscription vendors is evolving to assist as needed. Vendor databases and services now provide the help needed to handle all aspects of electronic journals - from access to licensing issues. [1] This presentation will focus on: 1) the traditional agent-library relationship; 2) the new, integrated agent-library relationship; and address 3) possible models for the future.

In the first part of the program, these issues will be presented through a live, scripted role-play between an academic librarian, Trisha Davis of The Ohio State University Libraries and an agent, Susan Hillson of the Faxon Company. The actual dialogue will help to 1) define new roles; 2) demonstrate use of appropriate communications for mutual benefit; 3) identify collaborative strategies; 4) show how the existing library-agent can gain new value in the electronic publishing world. The presentation will help both parties 5) understand new needs and expectations in the acquisition of electronic publications; 6) address the issues of negotiating and licensing issues; and will 7) discuss the use of new technology.

The second half of the program, will formalize the discussion and make specific recommendations on the evolution of this relationship. As the publishing community offers more selectivity in the electronic world, agents and libraries must expand boundaries and establish new methods for working collaboratively. Access issues, licensing, and complicated pricing schemes add a level of sophistication to the process of acquiring these journals. As a result, the subscription agents must expand their role to work hand-in-hand with the library.

Dialogue

Agent: The relationship between library and subscription agent has been very stable for many years. We've established a comfortable relationship. Unfortunately those models no longer work with the advent of electronic journals and full text publishing. This has brought about a certain level of discomfort that has forced all of us to look for new solutions.

Today, Trisha and I will explore the concept of the super-agent and will discuss guidelines for an expanded library-agent relationship that will establish new models for this evolving world of

electronic materials. Over the past year and a half, Trisha and I have had many conversations about her needs and the possible solutions that we, as her agent, can provide. The dialogue that follows is an abbreviation of those conversations and the solutions we've created.

Scene One: DEFINING THE PROBLEM.

Agent: Trisha, in the past when you ordered print materials, it was a case of what you saw was what you got. With electronic journals, we both know the world has changed dramatically.

Librarian: Yes, Susan, ordering materials for libraries is much more difficult for us now. Selection and acquisition are no longer based on the traditional content, pricing, and format criteria. In addition to the normal details of bibliographic verification, pricing, and availability, we have added new tasks such as identifying access methods and exploring definitions for our institution and its users.

For instance, at OSU Libraries, we have 19 libraries in 12 different locations serving user populations varying from the post-doctoral researcher to the local high school students. And that doesn't include service to our regional campuses. Before we can even place an order, we must examine 1) where the information or resource will reside, 2) how it will be accessed, and sometimes 3) we must even determine the specific machine descriptions.

Agent: And once you send the order to us, the entire research process becomes even more complex than ever before. As an agent, we have found that the most efficient and effective way we can support our client, is to create an in-house consultancy team. This is a new way to support the traditional acquisitions function that we perform for you as the library ... and on behalf of the publisher. It's a high level team of specialists who are experienced with this new environment. They serve as the research liaison between the publisher, our agency operations and the client obtaining information and identifying solutions so that we can simplify the entire purchase process.

Librarian: Susan, you're right on target. You've identified exactly where the problem lies. When I deal with publishers of electronic resources, we're both inexperienced at understanding each other's needs. They're doing their best to create and design electronic products for my patrons. Yet, what they provide is often at odds with what I believe we need.

Agent: When we look at electronic journals, at large, we like to divide the world into two distinct spheres: access and administration. Because you can't administer the process until you define access in terms of your site description, your user population, even down to the level of passwords and IP addresses.

Librarian: This is where the order process often overwhelms the library. In the past year, we've had to reinvent the wheel with every publisher and every license in terms of defining access and setting up the administrative details. At Ohio State University, we have a large, sophisticated staff who's experienced at defining and communicating these issues. Yet, many libraries are just beginning to learn what's required by electronic publishers.

Agent: Trisha, we realize that. That is exactly why we have established our Electronic Products Resource Team. This group will work with you at a high level to obtain all the detailed information required by the publisher. In many cases, we even work with the publisher to define what's needed at the library level. We will maintain and track your data: passwords, IP addresses, and definitions of your user population in our system. We can even do the preliminary negotiation of the licensing process.

Librarian: You know, Susan, when I think of all the licenses we have negotiated and all the publishers we have worked with, this idea of having a single source to manage both access and licensing, becomes very appealing. I've been hearing a lot lately about 'serial aggregators'. Do you see Faxon in this role? Would this provide both the access and administrative assistance we need?

Scene Two: DIRECT ACCESS

Agent: Yes, at Faxon that's where we started. We agreed that we cannot separate administration from access. And either way, you cannot administer the process until you determine the access. As an agent we're also becoming the aggregator, but... we also provide direct access to a wealth of electronic journals, either through third party relationships, or increasingly, through our own interface.

Librarian: Like the popular 'gateway' concept we've all heard about for so many years?

Agent: Yes, for Dawson or Faxon clients this includes all of OCLC's Electronic Journal Collection as well as journals that will be available through the Web service, InformationQuest.

Librarian: At Ohio State, we access a wide variety of resources, either through our own online catalog, through our state-wide consortia, or directly through Internet. Are you going to move into this area, too?

Agent: Yes, we see all of these materials, supplemented by tables of contents services and document delivery, to fall under the umbrella of Dawson's new product I just mentioned, known as IQ. In some cases, we serve as a reseller for journals from a specific publisher, or for a set of electronic resources focused on a given topic or area of research.

Librarian: What I also like is that we'd be able to focus on a common interface for all of our patrons. Susan, if you're getting so sophisticated in your content delivery, how can you help us support our entire user population from first-time searchers all the way to post-doctoral researchers?

Agent: Dawson's InformationQuest has been designed to support both the novice searcher and the experienced researchers with a full range of search strategies. The system benefits from Excalibur's search engine that will actually find articles like another that is right on target.

Librarian: Yes, that's great, since not all of our searchers will need the ability to go beyond the key word search and limit the results. This is the major frustration with full text searching.

Agent: Trisha, another by-product of this new approach can help with Ohio State's collection development process. To support our in-house Resource Team, we have established a variety of in-house resources...1) new databases of all the electronic journals; 2) indexing and abstracting information; and 3) data on which publications are peer reviewed. These are issues that I know are very important to you.

Librarian: This is great. Will this information be provided in your online system?

Agent: Yes, in fact we are looking are interfacing all Dawson systems worldwide, so maximizing access to the data you need. Our libraries will also be able to search and create reports to meet individual needs.

Scene Three: UPMARKET INFORMATION SERVICES

Librarian: We always thought that moving to electronic resources would speed up access for our patrons. What we never expected was the dramatically increased demand on printing, which created yet another hurdle. We thought the students would want to download the data directly to disk. But the demand on printing has really created another paper jungle and costs rise on a monthly basis, as paper, ink, and printer maintenance eats up a larger piece of our budget. Just this year we were forced to institute a page charge for our students to print out articles and citations. Have you heard of any good solutions to this problem from your other clients?

Agent: No, we are learning that this is indeed a universal problem. The one solution we can provide is to offer on-demand printing and binding for article subsets, bibliographic searches, subject profiles, or other frequently ordered materials. Whether you subscribe to the electronic journal or database, these products can be re-sold to your student population.

Librarian: So, with all these new products and services, what's your thinking on how you're going to charge for these services? Certainly, the current model of cost plus service charge isn't flexible enough to cover all these options.

Agent: And, this is a problem for every agent, too. As a result, there will be a variety of charging mechanisms, we are packaging options that incorporate the consultative services, on a flat fee basis,

Librarian: Susan, this is so important to us, because the value of an agent lies in our ability to simplify the tracking and charging process. Our in-house resources are diminishing, so the fewer agents we have to depend on, the better. And if the agent can also help us with researching orders and handling licenses ... we in turn save staff time and energy ... having gained the benefits of outsourcing these time-consuming tasks. This goes back to the fundamental goal of making our operation as effective and efficient as possible. And that's the primary reason we use an agent.

Summary and Recommendations

Most publishers and libraries have relied on familiar ways of handling the acquisition process. This process has included using a third party, or subscription agent, to act as a clearing house or consolidator, for journals, books, and a variety of other materials. Agents have also handled electronic publication formats, such as microfiche and CD-ROMs. With the advent of electronic publishing and the shift from purchase to lease, the familiar models that we have relied upon no longer work as effectively as they once did. Libraries often turn to their subscription agents in the acquisition process for scholarly journals, CD-ROM titles, or newsletters. For librarians the acquisition of electronic journals should be no different.

Although some academic and research libraries have begun to incorporate the world of electronic publications into their collections, many public, college and corporate libraries have not yet begun to approach this challenge. As a result, the role of the subscription vendor has evolved to include all of the administrative details of the electronic journal -- from access to licensing issues. Many vendors have provided comprehensive service offerings in the past, but the complexities of the electronic journal will behoove all subscription agents to become super-agents. The goal: a virtual one-stop shop for all research materials, from the traditional journal, books, microfiche, CD-ROM, bibliographic indexes, and a myriad of other services including tables-of-contents, document delivery and electronic journals projects complete with a Web interface and search engine.

Administrative Support

In order to meet the administrative challenges, many agents are establishing in-house teams to establish the necessary infrastructure to administer and implement orders for electronic titles. These expanded consultative services can be thought of as "out-sourcing" for the library that lacks the personnel in-house to interpret access data or negotiate a license.

Much of this process follows the models established for the normal print journal. However, since Internet journals are accessed -- not owned -- a host of licensing and access issues must be answered. The super-agent and library will work collaboratively to determine campus-wide requirements based on the available technology and access points within the institution.

The agent can provide guidelines for access, which can be used to assemble a profile including IP addresses, types of hardware accessing data, method of transmission (URL, direct to individual Internet address, special browser, CD-ROM or ftp for mounting on campus-wide network, etc).

By serving as the intermediary for the library, the super-agent will save most institutions countless hours per publisher and thousands of hours per year. The agent will also be instrumental in educating publishers about the technological needs of libraries.

Direct Access

In addition to answering the technology questions related to access, many agents are also providing access or a Web-interface to a collection of electronic journals often from many publishers. The super-agent may also be a re-seller for popular systems devoted to journals within a discipline or from dedicated publishers. The agent will provide access to an array of

services, from bibliographic databases to full-text and document delivery. These interfaces will also support search platforms suited for both the first-time searcher and the sophisticated researcher using key-word, Boolean, and other relevancy strategies.

Value-Added Data

The super-agent can also provide valuable collection development data. By capturing use statistics on the electronic journals, super-agents will provide the data to streamline the collection development process. They can answer questions such as where the electronic journal was indexed or abstracted. Is the journal peer reviewed? These data may be provided by the agent electronically via an online ordering system, or in management reports that can be transmitted electronically or perused at the librarian's desk.

Upmarket Information Services

With advanced technology and sophisticated ordering techniques, the super-agent will spend more time and energy developing innovative new forms of information delivery that add value to the library. Such services can be outsourced to the vendor. The agency service fee will encompass in-house library services that would be eliminated in a cost-cutting mode. For instance, an in-house document delivery service can provide "on demand" binding services for articles ordered for a bibliography or large-scale research project. Table-of-content services, subject profiles, or other frequently ordered materials, can also be bound in a customized fashion to produce a comprehensive information service that the library or information specialist can re-sell to the end-user.

Pricing Options

Most libraries are faced with providing more services with fewer resources. As the in-house resources diminish, a preferred option is to select a vendor who can incorporate the most creative package of services, to replace the task-oriented functions of staff with decision-making responsibilities. As a result, vendors are packaging attractive options that incorporate more consultative services based on the type of interaction between the library and the agent. Where the library takes responsibility for data input, as with most acquisition systems, the agent is freer to offer more interactive services of an advanced level.

Assisting the library with access issues and negotiation takes the agent-library relationship one step closer to the new millennium. The changes in scholarly communication and electronic publishing afford this partnership the opportunity to look less like a courtship and more like a marriage.

Susan B. Hillson, formerly Senior Manager, Market Development at the Faxon Company, a member of the Dawson PLC group of companies, has recently become Director, Business Partnerships at Imark Technologies, Inc., in Reston, VA, USA. She is known internationally for her expertise in database development and licensing issues. Prior to her involvement with Faxon, Ms. Hillson was Director of Marketing for CINAHL Information Systems, the nursing and allied health database provider. She is a frequent speaker on the topic of electronic journals, the use of technology and changing roles in the "new information age." Recent presentations include: "E-Journal Strategies for the New Millennium," a three-hour workshop prepared for the SLA Southern California Professional Development Seminars

(April 5, 1997) and "The Changing Role of the Vendor in the New Information Age," New York Library Association (NYLA) Meeting, October 25, 1996.

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