

# LICENSING TRAINING 1:

## RESPONSIBILITIES FOR LIBRARIES AND CONSORTIA DURING THE 10 LICENSING STEPS

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# IN THIS WEBINAR

- We will introduce the 10 licensing steps, from assessing institutional and user needs to deciding to start a new paid subscription, to monitoring usage
- This webinar is aimed primarily at libraries interested or able to take out new paid-for subscriptions, either via EIFL or directly.

# LICENSING PROCESS: 10 STEPS

1

- Assess institutional and user needs

2

- Identify e-resources

3

- Arrange free trial

4

- Promote e-resource on free trial

5

- Evaluate e-resource, analyze usage & user feedback

6

- Check prices and license agreements; negotiate

7

- Make decision & sign license agreement

8

- Get access

9

- Promote e-resource and provide technical support

10

- Monitor usage & collect feedback to help renewal decision

# 1. ASSESS INSTITUTION & USER NEEDS

## CONSORTIUM DUTIES:

The consortium needs to know the institutions' priority research areas.

Actions:

- Welcome new members, ask for a short presentation about the institution
- Visit institution's web-site
- Establish good relationship with librarians responsible for collection development

## LIBRARY DUTIES:

- Network with researchers/teachers/faculties/staff and find out their needs
- Conduct user surveys and analyze the results
- Develop your library collection policy
  - Create a map of your university's priority research areas
  - Identify gaps in your collection - think about the ways you can fill the gaps in collections

## 2. IDENTIFY E-RESOURCES

### CONSORTIUM DUTIES:

- Check the list of EIFL negotiated e-resources:  
<http://www.eifl.net/e-resources>
- Study the best practice of good working consortia (many of them can be found here:  
<http://icolc.net/consortia>)

### LIBRARY DUTIES:

- Ask your researchers
- Visit similar foreign university libraries' web-sites and investigate e-resources they subscribe to

*The right person to identify proper e-resources is a librarian working in cooperation with university researches and faculty staff.*

# 3. ARRANGE FREE TRIAL (1)

- Publishers willingly offer free trials to their e-resources to consortia. This is a good opportunity to learn about new resources.
- Always consider if the offered resource is valuable to your communities. If not, there is no point in requesting a trial, or accepting the offer of a free trial.
- You can ask for a trial by yourself. Visit the publisher's web-site and make the request.

# 3. ARRANGE FREE TRIAL (2)

## CONSORTIUM DUTIES:

- Ask your members who would like to have a trial. Create a list with name of institution, contact, IP addresses
- Send the list to publishers, and/or the EIFL Licensing team; ask for help if there are access problems
- Inform members about the trial: put information on your website, write introductory email
- In the end of the trial ask publisher to send you usage reports and disseminate them among libraries that took part in the trial

## LIBRARY DUTIES:

- If you'd like to have a trial, reply to the consortium manager's offer and send all requested information
- Ask consortium managers to arrange trial to resources that might be useful for your community. Better email than telephone call.

# 4. PROMOTE E-RESOURCE AVAILABLE AS FREE TRIAL

## CONSORTIUM DUTIES:

- When the access is open, check how it works
- Inform members about the opened access
- Forward all information that you've received from publishers to members. If needed – translate it.
- Publish short information about the trial on the consortium website

## LIBRARY DUTIES:

- Check access to e-resource
- Inform staff/students/etc about the access - put information on your website & social media
- Send emails to target groups that might be interested in the content
- Use as many channels as you have to inform your users (personal contacts work the best)
- Write personal letters to important researchers in this field

# 5. EVALUATE E-RESOURCE, ANALYSE USAGE & USER FEEDBACK

Questions to answer while evaluating e-resources for Consortium and Library staff:

- What is the content of this e-resource?
- Is there demand/feedback from end users for this product?
- What is the usage?
  - There is no need to pay for the subscription if nobody uses it
- Is there content overlap with other products you already have? Check if you offer products that are very similar to each other.

Use free tools, for example



# 6. CHECK PRICES AND LICENCE AGREEMENTS

## CONSORTIUM DUTIES:

- For EIFL e-resources, all negotiations have already be done. Check EIFL website for prices and licences. Review the licence checklist to check differences to the EIFL model licence.
- For non-EIFL resources, approach publishers directly. Review licence agreements, including usage restrictions, permitted uses & authorized users.
- Consider comparing non-EIFL licenses with the EIFL model licenses
- Keep your members informed about the negotiation process.

## LIBRARY DUTIES:

- Provide the consortium with all needed information (FTE, IP addresses etc.)
- Let the consortium know if you're able to pay for a subscription

# 7. MAKE DECISION & SIGN LICENCE AGREEMENT

- The final decision about a subscription depends on whether institutions can pay for a subscription
- If libraries decide to subscribe and pay the subscription fee, the consortium carries out the formalities and signs the licence on behalf of subscribing libraries
- For EIFL resources, make sure you inform EIFL of any new subscriptions.
  - You can ask the EIFL Licensing team for help with completing the licence acceptance forms.
  - Copy [subscriptions@eifl.net](mailto:subscriptions@eifl.net) into communications with publishers.

# 8. GET ACCESS

The standard form of institutional access is via IP address. IP addresses must be:

- external/public: internal/private IP addresses cannot be seen on the internet
- static: access will not work if IP addresses are assigned dynamically (i.e. they change each time a user accesses the internet)

Usually publishers allow remote access to authorised users using passwords or via proxy servers (EZproxy, VPN etc.)

# 9. PROMOTE E-RESOURCE & PROVIDE TECHNICAL SUPPORT

## CONSORTIUM DUTIES:

- Check whether the access works and inform your members about the subscription
- Make them aware of permitted uses and usage restrictions
- Send an introductory email about the resource content, technical requirements, support contacts
- Write short information on the consortium website
- Ensure technical support and provide help in creating promotional materials and promoting e-resources

## LIBRARY DUTIES:

- Inform all concerned parties about access to the content, and make them aware of key permitted uses and usage restrictions: library staff, admin staff, heads of departments, student office, information desk, student association, academic staff, researchers, students
- Use different channels (e-mail, library website, social media, personal communication)
- Publish information in university newsletters and other media

OPEN ACCESS KNOWLEDGE WITHOUT BOUNDARIES

# 10. MONITOR USAGE & COLLECT FEEDBACK TO HELP RENEWAL DECISION

## CONSORTIUM DUTIES:

- Monitor and analyze usage reports for all Consortium members on regular basis (at least once a year)
- Download reports from admin sites
- Ask publishers for a consortium report
- Ask EIFL for help

## LIBRARY DUTIES:

- If you received a personal login to the admin site, you can check your own usage statistics
- Monitor and analyse library usage reports
- Meet users and get their feedback on subscription
- Depending on usage and user feedback make decision regarding subscription renewal

# REVIEW OF THE 10 STEPS

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# THANK YOU!

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