Council of Library Deans (COLD) E-Resource Purchasing Exploratory Task Force (CERPE)
June 6, 2019

The libraries of the California State University system (CSU) acquire a substantial number of their electronic resources (e-resources) through CSU's Systemwide Digital Library Content consortium (SDLC), which is based in the CSU Chancellor's Office.   The SDLC manages the Electronic Core Collection (ECC), a collection of subscription databases that are available to all 23 CSUs, as well as additional e-resources that are available on an "opt-in" basis. A small number of CSU libraries also participate in the Statewide California Electronic Library Consortium's (SCELC) consortial buying process.

CHARGE: The CERPE TF is charged with investigating the current practice of purchasing CSU e-resources through SDLC and SCELC, as well as exploring viable alternatives.

The objectives of CERPE are to:

- Understand the cost-recovery fess and pricing formula used in SDLC and SCELC's licensing programs.
- Through an environmental scan, understand how library consortia with similar stakeholders structure their cost-recovery and cost-share programs.
- Explore potential alternative options for centralized acquisitions of e-resources as appropriate.

The goals of CERPE is to:

- Determine the most cost-effective and efficient way to centrally license e-resources on behalf of CSU institutions to ensure that CSU funds are spent in the most impactful manner.
- Determine an equitable cost-share formula.

MEMBERS:

Emily Bonney, CSU Fullerton
Eddie Choy, CSU Office of the Chancellor
Tracy Elliot, San Jose State
Dell Hornbuckle, Fresno State
Amy Kautzman, Sacramento State (Chair)
Patrick McCarthy, San Diego State
Karen Schneider, Sonoma State

CERPE has engaged the consulting firm, CDygert Solutions, to assist with this project.

REPORTS TO: COLD Executive Committee

CERPE PROJECT PLAN
June 6, 2019

Phase One: Information Gathering
The work accomplished in this phase will inform phase 2 of the project with the purpose of providing CERPE a 360° analysis of the issue at hand.

In this phase of the project, CDygert Solutions will take the lead to:
- Identify the cost-recovery fess and pricing formula used in SDLC e-resources licensing program.
- Identify the cost-recovery fess and pricing formula used by SCELC.
- Conduct an environmental scan of library consortia with similar stakeholders to identify current e-resource licensing practices and their pros and cons.
- Perform an analysis of 4-year pricing history of products licensed through the SDLC to determine average increases.
- Help CERPE determine whether to:
    - Explore the potential for moving the service to CSU's Procurement or CalUSource? Of concern would be issues of dedicated staffing and knowledge specific to the acquisition of library resources, such as licensing and unique pricing models.
    - Explore the potential for locating this workflow on a CSU campus as a shared service. An area of concern would be staffing. For example, does CSU-HR allow for shared, system-wide hires that are homed outside of the Chancellor's Office.
    - Explore whether CSU would benefit by partnering with the UCs via a common procurement approach? (https://calusource.net/)

Members of the task force will:
- Explore internal CSU operations in other areas of shared services. Do other CSU units pay a cost recovery fee for services provided by Academic Technology Services? If so, what are they and what formula drives them?

Phase Two: Synthesis Phase
Upon completion of the information gathering phase, CDygert Solutions will draft a report that synthesizes the findings, to include:

- Summary of current SDLC and SCELC practices, cost-recovery fees, and pricing formulas.
- Findings from environmental scan.
- Pricing analysis results.
- Findings from any exploration of potential alternatives to acquiring e-resources beyond SDLC and SCELC.
- Exploration of internal CSU operations in other areas of shared services.

This phase of the project will likely require follow-up meetings with staff at the CSU Chancellor's Office and others on points of clarification and verification of facts.

Phase Three: Consideration of Options and Recommendations
CERPE activities in this phase will largely be driven by the 360° analysis of the problem as detailed in the report resulting from phase 2.

CERPE activities should include:

- A thorough review of the report produced in phase two of the project.
- Consideration of the efficacy of current SDLC/ECC/SCELC buying practices.
- Discussion of equitable[1] division of costs and potential changes to current practices.
- Identification of options for moving forward.

Ideally, this phase of the project would begin with an in-person meeting of CERPE, with CDygert Solutions in attendance to facilitate the discussion and decision-making process.

The outcome of this final phase of the project will be a report to COLD that provides:

- Recommendations for the most cost-effective process for centrally licensing CSU e-resources.
- An equitable manner for diving cost.

CDygert Solutions will work with CERPE to draft the final report for the project.

PROJECT TIMELINE: June 5, 2019 – September 2019.

The final report is due by the September 2019 COLD meeting.

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[1] Equitable does not necessarily mean the cheapest or straight division of costs. Rather, it considers the need for all our students to have access to standard research tools. This may mean that some campuses carry a slighter higher cost.