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Mary Moore and Suzetta Burrows, Column Editors

Group Purchasing by a Regional Academic Medical Library

Consortium:

How SCAMeL made it Work

JoAnn Van Schaik

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ABSTRACT. Cooperative academic library organizations have existed in the United States at least since 1933. Many of these organizations which formed prior to the advent of electronic resources have added group negotiating, licensing, and purchasing to their activities. One of those consortia is the South Central Academic Medical Libraries (SCAMeL). The steps this organization took to succeed in collaborative electronic resource collection development and the possibilities for its future are discussed.

KEYWORDS. Collection development, consortium, library, SCAMeL

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INTRODUCTION

The South Central Academic Medical Libraries (SCAMeL) consortium held its organizational meeting at Petit Jean State Park in Central Arkansas in October 1982. By that time, cooperative organizations among academic libraries in the United States had existed at least since 1933, when the Triangle Research Libraries Network was formed.¹ Health science library consortia also existed. The Basic Health Sciences Library (BHSL) Network formed in 1968 as an affiliated group of academic and non-academic health science library consortia in New York, New Jersey, Pennsylvania and Delaware.²

Formation of the SCAMeL consortium was endorsed in October 1981 by the Resource Library Directors Committee of the National Network of Libraries of Medicine (NNLM) region comprised of Texas, Arkansas, Louisiana, Oklahoma, and New Mexico Texas (TALON). The newly formed consortium would consist initially of 12 libraries serving institutions that offered post-baccalaureate degrees in allopathic or osteopathic medicine in the five-state region. SCAMeL now has 14 member libraries, having lost one member and gained three more since its inception.

As with many library consortia established prior to 2000, the newly formed SCAMeL consortium hoped to enhance interlibrary loan cooperation and resource sharing among the academic medical libraries in the South Central region. The minutes

of the TALON Resource Library Directors Committee in October 1981 state that the new consortium would be formed in order to undertake networking programs or projects benefitting its member libraries. The minutes further state that the four areas of concentration for cooperative activities would be Catalogs, Resources, Document Delivery, and Other. The minutes define these targeted areas and how SCAMeL would support them in the following manner:

Catalogs. SCAMeL libraries will actively support databases of regional bibliographies, indices, directories, and holdings in any format, and accessible to all members.

Resources. Resource development will be enhanced through cooperative acquisitions' activities.

Document delivery. Among the member libraries, document delivery will be conducted within a framework of pre-established fees and reciprocal agreements.

Other. Activities mutually agreed upon which support the purpose and mission of the consortium will be undertaken.³

Following adoption of bylaws and a dues structure, the SCAMeL consortium began working toward its goals. At that time, few health sciences librarians understood the scope of the challenges their libraries would face in the mid-1980s onward as a result of the proliferation of new Scientific, Technical, and Medical (STM) journals, skyrocketing institutional journal subscription prices, and increasingly fragile budgets. Those three challenges would soon be joined by yet another, the introduction and quick expansion of electronic journals. Although the SCAMeL consortium has grown and evolved in a number of areas over the years, by 1999 the profound changes in the

scholarly publishing world would cause the SCAMeL consortium to evolve in a manner that could not have been predicted when it was established in 1982.

During SCAMeL's early years task forces were formed to address concerns about continuation of the non-print catalog, the union list of serials and its relationship to DOCLINE and SERHOLD, and cooperative interlibrary loan (ILL) among the health science libraries in the region.

Much discussion centered around cooperative acquisitions whereby SCAMeL libraries would commit to purchasing materials from assigned publishers in order to guarantee that at least one library in the consortium's region held a book title or subscription. Previous to SCAMeL's creation, a number of the TALON region libraries had committed to subscribing to particular journals to ensure their availability in the region. SCAMeL created the Serials Advisory Committee in 1988 to continue to evaluate unique holdings in the region and address cancellations of subscriptions. The attempt by SCAMeL libraries to volunteer to keep or accept assigned subscriptions became untenable by the early 1990s because, as Kinner and Crosetto state when discussing the challenges of academic consortia, "...when faced with the possibility of giving up autonomy and funds, the spirit of collaboration and actual participation becomes challenging."⁴ SCAMeL would again face the issues of library autonomy and funds while renegotiating licenses for consortium purchases in 2009-2011.

In 1997 the consortium began testing an Electronic Fund Transfer System (EFTS) to replace its ILL coupon program. EFTS was implemented soon thereafter. In September 1999, the SCAMeL Board of Directors entertained a proposal for consortium licensing of the Academic IDEAL journal package, which was ultimately approved, and

in Spring 1999, the Board approved SCAMeL licensing of MDConsult. Those two initial licenses represented a new way for SCAMeL libraries to perceive and participate in “resource sharing.”

FORMATION OF THE COLLECTION DEVELOPMENT COMMITTEE

The proposal to license the Academic IDEAL journal package to the SCAMeL Board of Directors in 1999 was presented by Judy Wilkerson from the Robert M. Bird Health Sciences Library at the University of Oklahoma Health Sciences Center. Wilkerson would continue, aided by her library’s Director, Clinton “Marty” Thompson, to negotiate the early SCAMeL licenses for nearly five years while continuing to work as Head of Serials Services at the Bird Library. The precedent of one SCAMeL librarian negotiating for the consortia would continue for some time, eventually with the aid of a new Collection Development working group within the consortium.

When approving the IDEAL license proposal, SCAMeL also agreed to help fund some of the cost of the package for three years. This was another precedent that would continue for several years, but only with selected consortium licensed products. In addition to IDEAL and MDConsult, other products discussed for possible licensing by the consortium in 2000 were OVID, Blackwell, Nature, BMJ, and Kluwer journal packages.

At the same time, in an effort to encourage research by librarians in the region, SCAMeL established and funded an award for research-related papers and posters presented at the Medical Library Association’s South Central Chapter’s (SCC) annual

meeting. Also in 2002, participation in the LOCKSS archiving project was undertaken by some SCAMeL libraries. Even as SCAMeL continued to explore and implement new endeavors such as the research award and the LOCKSS project, it was becoming increasingly clear that the time, work, and exchange of information needed for effective joint collection development of electronic products by the consortium was growing. Recognizing the importance of this effort to their libraries, the SCAMeL Board of Directors added to the agenda of its March 2003 meeting a discussion of the issues involved in joint collection development and how best to move forward. Judy Wilkerson, along with Esther Carrigan and Joe Jaros from Texas A&M University's (TAMU) Medical Sciences Library led the discussion on "Emerging issues and approaches to collection development – beyond consortia purchases." The major outcome of this discussion was the Board's acceptance of the three librarians' recommendation to create a collection development committee within SCAMeL similar to the consortium's Interlibrary Loan Committee.

Immediate goals for the new Collection Development Committee were defining its composition, determining its budgetary needs, insuring its continuity, supporting resource development, and discovering the best mechanisms for introducing new issues and products to the membership for consideration. The scope of the committee's work was to encompass print and digital materials, records management, web-based materials, archives and archiving, special collections, museums, and historical collections. Serving as both an information gathering and advisory group to the SCAMeL Board, the Collection Development (CD) Committee would assume roles of varying degrees for the consortium in a number of activities, including the following:

Collaborative acquisitions

Information sharing (consortium product negotiations, license interpretation)

Continuing education and professional development for committee members

Interpretation of statistics

Scholarly communication

Organization and management of electronic resources

Product comparisons

Product recommendations to the Board

Standards

Archiving

Working with other consortia

The composition of the new Committee would consist of a collection development librarian from each SCAMeL Library, for whom SCAMeL would pay to attend an annual meeting of the Committee members. It was determined that additional SCAMeL librarians could attend the meetings, but their libraries would have to fund their attendance. The Committee would report on the proceedings and recommendations that resulted from the meetings in written reports to be delivered in person at SCAMeL Board of Directors' meetings by a CD Committee member. Before the 2003 Spring SCAMeL Board meeting was adjourned, the new Committee received its first assignment—research, discuss and recommend to the Board what actions the SCAMeL libraries should take regarding uniform reporting of SERHOLD records for online only journals.

The first Collection Development meeting was held in Dallas, Texas in October 2004. Carrigan and Wilkerson developed the agenda and arranged the meeting, which

covered a number of agenda items, including the possibility of SCAMeL funding BioMed Central (BMC) memberships for member libraries, BMJ and Blackwell journal package licensing, and the SERHOLD online journal record issue. The SCAMeL Board was so pleased by the report it received from the CD Committee representative at the Board meeting that followed, that it passed a motion to approve funding for the CD Committee to meet twice a year. It was obvious to the SCAMeL Board of Directors that many benefits could be derived by face-to-face meetings of this group of regional academic health sciences librarians who were dealing with the complex issues involved with electronic products, including negotiations and licenses, access, vendor pricing models, interlibrary loan, new product trials, open access, and print retention.

ACCOMPLISHMENTS AND CHANGES

The Collection Development Committee of SCAMeL continues to function as a viable working group whose primary focus is collaborative collection development, yet it has remained flexible, researching and debating a variety of issues for which recommendations have been made to the Board. It has undergone personnel and minor structural changes but remains very much as it was when formed. Some of SCAMeL's accomplishments in which the CD Committee played a role since 2004 follow:

- In scope online journals' holdings entered into SERHOLD
- Collection development information included in a password protected section of the SCAMeL web site

- Gold Rush management package for SCAMeL licensed products purchased
- BMC and PLoS payments subsidized for SCAMeL libraries for several years
- Standardized renewal dates established for nearly all SCAMeL licenses
- Improved service by journal vendor following intercession of SCAMeL Directors
- SCAMeL membership in International Coalition of Library Consortia (ICOLC)
- Joint meeting with the SCAMeL ILL Committee
- SCAMeL libraries currently can participate in group licenses for the following consortium negotiated products:
 - AccessMedicine
 - BioMed Central All Journals
 - BioMed Central membership
 - BMJ package
 - Cold Spring Harbor Protocols
 - ExamMaster
 - Faculty of 1000 Journals
 - Gold Rush electronic serials management service
 - Mary Ann Liebert package
 - Natural Medicines Comprehensive Database
 - Nature Journals Online

- PLoS
- Protein Lounge
- Psychiatry Online
- Springer Images

Changes in personnel and structure of the Collection Development Committee happened for several reasons but the major cause of both was the amount of work and time required to investigate new products, negotiate licenses, process renewals, communicate with the membership and Board, maintain updated FTE counts and IP Ranges for the consortium libraries, invoice, and plan agendas and meetings. Judy Wilkerson was aided in this work by several other SCAMeL librarians, most notably Esther Carrigan. Bobby Carter, Director of the Gibson D. Lewis Library at the University of North Texas Health Science Center (UNTHSC), served as SCAMeL treasurer and volunteered his staff to handle invoicing for SCAMeL products and UNTHSC's legal staff to review licenses. Tulane University's R. Matas Library of the Health Sciences offered to host and maintain the SCAMeL web site. Wilkerson continued as the primary librarian for negotiating licenses for the consortium until Carrigan assumed the role of head of the CD Committee in 2005.

The SCAMeL Board and the CD Committee discussed other options for handling collaborative licensing. The possibility of hiring a part time librarian was considered, as was using a journal vendor to manage licenses and invoicing. These solutions would cost the consortium additional money. (SCAMeL pays stipends to libraries heavily involved with licensing and invoicing to help defray costs and support attendance at professional meetings for those librarians most affected by the workload.) Assessing participating

libraries a handling fee to pay for those potential solutions could negate the savings gained by group licensing. Spreading licensing work out to be handled among the CD Committee members was considered, but concerns were raised about differing negotiating abilities, consistency of negotiations, and vendor relationships. Various Committee members did volunteer to be vendor contacts for designated products when access issues arose. Finally, a more organized approach emerged at the 2005 SCAMeL Board's Fall meeting when Martha Bedard, Director of Texas A&M's Medical Sciences Library, volunteered that library's staff to handle SCAMeL licensing on a one year trial basis, assisted by Rajia Tobia at the University of Texas Health Science Center at San Antonio. Because so much CD Committee business was conducted via an e-mail list, at this same meeting the Board approved the Committee's recommendation that it drop its meetings held in Dallas from twice annually back to once a year. Short meetings to update Committee members would continue to be held at the South Central Chapter of the Medical Library Association (SCC/MLA) annual meetings. This change from two funded meetings a year to one, not only saved SCAMeL money but also decreased the amount of time spent preparing an agenda for and organizing a second meeting.

By the time the Spring 2007 SCAMeL Board of Directors meeting was held, Esther Carrigan had been appointed Director of TAMU's Medical Sciences Library and requested that a replacement be found for her leadership role on the CD Committee. TAMU's Medical Sciences Library would continue to handle the negotiations and licensing for the consortium, and three TAMU librarians assumed responsibility for this work. Nancy Burford, Taryn Resnick, and Ana Ugaz would continue in their efforts on behalf of SCAMeL's CD Committee for close to five years before requesting relief.

Millie Moore from Tulane University Health Science Center Library and JoAnn Van Schaik at Texas Tech University Health Sciences Center Libraries undertook responsibility for planning meetings and agendas. This redistribution of much of the CD Committee's work spoke to the energy and dedication of Wilkerson and Carrigan during the early years of the Committee, and to the increasing number of products, with their attendant issues, that the CD Committee was attempting to manage.

THE FUTURE OF SCAMeL CONSORTIUM LICENSING

The impact on libraries of the economic downturn of the latter half of the past decade cannot be underestimated. This worldwide economic situation prompted ICOLC to issue its "Statement on the Global Economic Crisis and Its Impact on Consortial Licenses" in January 2009, adding a Preamble in June 2010.⁵ The initial statement warns that reductions to library budgets will be long term in many cases and states that library consortia are "uniquely positioned to be the most effective and efficient means to preserve the customer base for publishers..."⁵

Others question the ability of group purchasing to survive the current economic climate when some libraries are unable to continue participation in licenses and new products go uninvestigated because too few libraries within the group have budgets that allow them to add new products. Perry and Okerson's 2009 survey of ICOLC members found that consortia report doing very little new licensing, instead focusing on renegotiations of standing licenses in an effort to meet budget demands.⁶

Yet in his 2003 article, “Consortia and Their Discontents,” Peters warns that “The alternatives to consortial collaboration include: unilateral activity by a library, bilateral agreements between libraries and publishers, aggregators, vendors, and service suppliers, unnecessary redundancy, and missed opportunities.”⁷

SCAMeL and its Collection Development Committee have not been immune to the economic situation or to collective soul searching about continued consortial licensing efforts. While the ICOLC Statement⁵ in 2009 includes suggestions of principles and approaches for publishers and vendors to follow for negotiations with libraries during economic hard times, Westmoreland and Shirley lay out common sense suggestions for consortia trying to weather difficult economic times.⁸ Most are included in the following section and many are applicable to the SCAMeL consortia, as well as other academic consortia, and library purchasing consortia in general.

Be agile. The possibility of opening up participation in consortial purchases to libraries outside of SCAMeL’s member libraries could be considered. This would not require SCAMeL to change its membership requirements or product focus, but would allow libraries in healthcare facilities and institutions lacking schools of medicine but serving nursing and allied health programs, the opportunity to participate in product purchases. A larger group of participants should lower the cost per participating library for licensed products.

Add value. Consider providing training and consulting. This would be particularly helpful if non-SCAMeL libraries are invited to participate in group purchases.

Find a niche. This has been done extremely well by SCAMeL . The Collection Development Committee has remained focused on healthcare education, clinical, and biomedical research products.

Work with vendors to find creative funding models. Vendors are saving time, effort, and resources in consortial dealings by having one point of negotiation. They should be reminded of that when they are unwilling to entertain new ways of pricing and licensing products.

Focus on new products. New product licensing is a positive for both consortia and vendors. Little money can be saved by a consortium attempting to license a product already in wide use. Likewise, little money can be made by the product's vendor. Even while libraries are experiencing flat or declining budgets, consortia should continue to investigate new products for licensing since eventually they will help libraries realize the greatest value. This will also give consortia time for extensive examination of products and development of unique strategies for negotiating terms.

Revitalize. Members' needs and wants should be periodically surveyed in order to identify possible new initiatives and drop those that no longer fit the current information environment. Since it is an organization with a long-term structure in place, as well as being a regional and subject-focused consortium, SCAMeL has been highly responsive to member libraries' concerns and product needs.

Cost-benefit analysis. In difficult economic times, every dollar spent by a library may need to be justified to its administration. Stating that money is saved by consortial purchasing may not be enough if a library's consortium dues or travel expenses for meetings are questioned. The library literature provides case studies and other articles

detailing return on investment studies of library group purchasing. Since this can become another time and workload issue for many consortia, perhaps an analysis of the three most expensive products, or three different types of products, would be good starting points for consortia which have yet to undertake this task.

CONCLUSION

For nearly 30 years, the SCAMeL consortium has enabled collaboration among academic health sciences libraries in its five-state region in a variety of areas, most notably interlibrary loan and cooperative collection development. It has also undertaken other projects to the benefit of the libraries and librarians in the South Central region. Its initial foray into group licensing of electronic products in 1999 led to the creation of a Collection Development Committee that undertook projects and researched issues and potential products for licensing at the request of the Board of Directors. As the number of electronic products being developed increased, so did the work of the CD Committee. The number of librarians actively involved in planning, negotiating, and licensing both new electronic products and renewals of standing agreements grew over time. As with many consortia, few new products have been considered for licensing during the past several years due to flat or reduced budgets in a number of SCAMeL libraries.

With fewer new products being investigated and licensed by many consortia, perhaps it is an optimal time for consortia to examine their licensing workflow, the scope of their licensing and participants, vendor relationships and pricing models, and how best to prove the value of group licensing. Library consortia, including SCAMeL, need to

continue doing what they have done so well for so long in the area of collaborative collection development. As those efforts continue, serious discussion about where each consortium has been and where it plans to go with respect to group licensing of electronic products needs to occur. Undoubtedly, there will be disagreements, but Peters is correct when he states, “Often the best collaborative efforts occur when there is lively disagreement and debate, not consensus.”⁷

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