OLIS Update
September 20, 2023

Welcome Back!

Hello and welcome to:

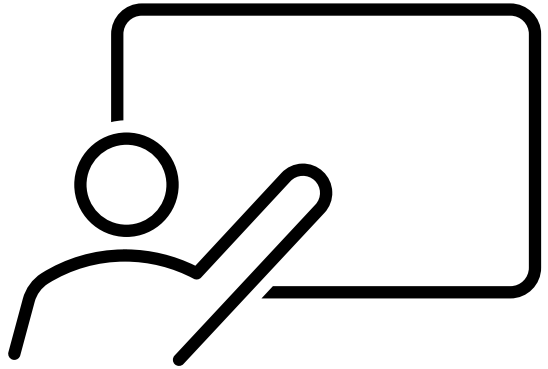
- New Library Leaders
- New SUNY library hires

Congratulations on retirements and farewells to some of our library community members.

To get in touch with OLIS staff, please reach out to: info@sunyolis.libanswers.com
We're here to help!

Agenda

- General Updates
- NOVELny
- Collections
- Professional Development
- Alma/Primo VE
- Working Groups /Interest Groups
- Metadata & Cataloging
- Resource Sharing
- Research Data Management
- Repositories
- OER Services



Who's Who in OLIS/OER

- **Kim Scalzo** – *Interim Senior Associate Provost for Digital Innovation and Academic Services*
- **Maureen Clements** – *Associate Director of SUNY Library Services*
- **Tony DeFranco** – *Director of Operations, SUNY OER Services*
- **Catherine Stollar Peters** – *Associate Director of Assessment and Data Analysis, OLIS*
- **Cori Wilhelm** – *Program Manager, OLIS/OER*

Who's Who in SUNY Library Services

SUNY Library Services (SLS)

- **Michelle Eichelberger** – *E-Resources & Discovery Program Manager & Support Specialist*
- **Tim Jackson** – *Resource Sharing Program Manager & Support Specialist*
- **Yvonne Kester** – *Institutional Repositories Coordinator & Support Specialist*
- **Rebecca Nous** – *Support Specialist*
- **Susan Perry** – *Support Specialist*
- **Marcy Strong** – *Metadata Coordinator & Support Specialist*
- **Esta Tovstiadi** – *Collections Support Analyst*

General Updates

SUNY Board of Trustees and SUNY Research Foundation Board of Directors Announce the Appointment of Dr. Ramasubramanian as Executive Vice Chancellor for Academic Affairs and Provost, and President of the SUNY Research Foundation

Effective November 6, 2023

https://www.suny.edu/suny-news/press-releases/8-23/8-29-23/index.html

OLIS Advisory Board - Expanded membership

Welcome, new members:

- **Andrea Falcone,** Binghamton University
- **Susan Frey,** SUNY New Paltz
- **Karen Gelles,** Farmingdale State College
- **Jacquie Keleher-Hughes,** Schenectady County CC
- **Jennifer Kronenbitter,** SUNY Cortland
- **Clare O'Dowd,** Rockland Community College
- **Matt Smith,** College of Environmental Science and Forestry
- **Anna Wong,** SUNY Canton

Joining our existing members:

- **Jill Kehoe,** SUNY Maritime
- **Jamie Saragossi,** Stony Brook University
- **Adam Saunders,** SUNYLA President
- **Mark Sullivan,** IDS Project

Questions for the Board form:

- SUNY community can use to ask questions of the board
- https://sunyolis.libwizard.com/f/olisadvboard

Strategic Plan Progress Roadmap

Accomplishments for AY 2022-2023

- Designed OLIS success metrics (will share through Annual Report)
- Partnered with ORIED on supporting research activities
- Provided research data management support
- Continued to ensure systems are well-maintained, reliable and user friendly
- Created meaningful onboarding and orientation programs
- Professional development opportunities for library leadership and management development
- Developed methods for OLIS community input and feedback
- Worked collaboratively to review and sunset SLC, transitioning to new models of governance and collaboration

Strategic Plan Progress Roadmap

Strategic Initiatives for AY 2023-2024

- Continue to collaboratively review policies and governance
- Analyze cataloging needs, staffing levels, and OLIS support
- Develop consulting and support services for libraries facing resource constraints
- Support systems where research access is crucial, Integrate with DLE and provide training
- Refine strategies and policies for Open Access Repositories
- Write Assessment Plan and build toolkit

General Updates

- SUNYOLIS has a new LibGuide domain
  - https://sunyolis.libguides.com/friendly.php?s=olis
  - SLC LibGuide archived
  - Updating info, refreshing documentation
- New support address
  - info@sunyolis.libanswers.com
- OLIS Annual Report, look for it this winter!
- Looking for FACT2 Council AI Task group members – contact Katie Ghidiu from Monroe CC
- Wrap-up Kawanna Bright project
- eBook task group is on hiatus

Orientation

- Courtesy orientation service for variety of roles within SUNY Libraries:
  - Overview of OLIS, SLS
  - Collections
  - Role-based, high-level training
- In 2022-2023, OLIS provided onboarding services for 28 people across SUNY
- Renaming orientation to better reflect experience.
- New orientation request form: https://sunyolis.libwizard.com/f/orientation

SUNY Diversity, Equity, Inclusion, and Social Justice Fellows

SUNY DEISJ Fellows appointed June 2023

Fellows will help shape the new SUNY DEISJ general education knowledge and skills area

Goals

- Build Community of Practice for mentoring faculty teaching DEISJ general education courses
- Develop libraries of DEISJ-related resources
- OLIS recommends Fellows work with their local libraries on collection development

NOVELny: What is it?

New York State Library provides access to NOVELny, an online virtual library connecting New Yorkers to 21st century information via libraries and library systems statewide.

NOVELny is an electronic resource access project that enables libraries across New York State to give their communities online access to the full text of thousands of journals, newspapers and other references.

New Yorkers accessing the databases through a library website or the NOVELny portal while in New York will be able to enter the databases via geoIP authentication (also referred to as geolocation) without entering a username/password or library card number

NOVELny non-renewal

- May 2023 meeting with Lauren Moore (State Librarian) and Amy Heebner (Librarian development)
- NY State library has $8 million budget, $2.6 of which has been going to support NOVELny funding.
- NY State library has been using IMLS grant funds to pay for the initiative https://imls-spr.imls.gov/Public/Details/85236
- Due to rising costs of databases and flat federal funding, NY State library will suffer budget deficit of $1 million by 2024.
- The cultural education fee that supports the NY State library was not included in the enacted state budget, therefore the NY State library can no longer fund this initiative after June 30 2024.
- No plans to extend funding due to challenges inherent in procuring database resources on behalf of NY state, a process that can take up to 18 months and is limited to vendors on state contract.
- **NOVELny will not renew June 30, 2024**

NOVELny OLIS response

- Analysis of SUNY-wide usage of Gale resources over past three years
  - Gale Academic OneFile (40% of usage), Opposing Viewpoints in Context, Gale OneFile: News most used
- Meetings with Gale and Britannica to review pricing, usage and options
- Convened task force - reviewing usage and pricing models
- Meeting with State Librarian about possibility of cost-sharing across DOE entities (June 2023)
  - Based on SUNY institutional usage
- Meetings with NYALS constituents, led by Sheryl Knabb to continue discussions about impact

NOVELny Task Force

Charge:
This group will make a recommendation regarding potential next steps for OLIS related to the upcoming expiration of the State Library NOVELny database package. Specific tasks and outcomes include:

- Review usage data
- Review overlap and content analyses
- Review offers and procurement vehicles
- Solicit feedback from SUNY libraries

Members:

- ☐ **Carol Anne Germain** – UAlbany (UC rep)
- ☐ **Carrie Martin** - Purchase (Comprehensive rep)
- ☐ **Kerry Carlson** - Suffolk CC (Community College rep)
- ☐ **Lauren Bradley** – Maritime (Technical College rep)
- ☐ **Abigail Streeter** – Stony Brook (At-large rep)
- ☐ **Noah Roth** - SUNY Broome (At-large rep)
- ☐ **Maureen Clements, Esta Tovstiadi** (OLIS reps)
- ☐ 14 volunteers – thank you!

NOVELny Task Force Timeline

Timeline

- June: Call for task force
- August: Initial meeting
  - Met August 28 to review charge
- September: Assign tasks, review usage, pricing models and offers, discuss impact, gather feedback
  - Sept 14: reviewed Gale usage, discussed pricing models
  - Sept 29: review models, mechanisms for gathering feedback on impact
- October: Gather feedback, continue data and usage review, draft recommendations
- November: Final report, recommendations of task group, OLIS webinar on outcomes

COLLECTIONS

Collections

- ATIS portal / recharge
- Reminder - NEJM now being billed through Wolters Kluwer (no longer consortial pricing)
- SUNY Opt-in contract updates
  - Artstor
  - Renewals – July 1, 2024
    - NYTimes
    - Chronicle of Higher Education
    - Proquest
    - JSTOR/Artstor
  - Not renewing as of July 1, 2024
    - Westlaw

Collections

GALE

- Summer Gale eBook weeding
- Gale Interactive Human Anatomy offer
  - Submit a ticket for pricing

EBSCO

- Exploring Race in Society - available for all SUNY libraries. The collection can be for activated in Alma but does not allow for article linking. We recommend direct linking from your library A-Z list.

JSTOR

- Session about new pricing models. Recording available on Basecamp

Shared Collections Committee

- Shared Collections Committee (an SLC committee) disbanding and being replaced with OLIS Collections Advisory Group
  - 10-12 participants
    - Call for volunteers soon; submit ticket if interested
  - Meet on an as-needed basis; quarterly
  - Provide feedback and direction on OLIS initiatives
  - Work with OLIS Advisory Board

PROFESSIONAL DEVELOPMENT

Upcoming Webinars and Professional Development

- Research Data Management Training Series (throughout Fall)

- Webinar:
- Using Local Collections and GES for Custom Linking in Primo VE – Sept 28 @ 2pm

- Spotlight on SUNY Libraries:
  - Mold Challenges – Oct 3 @ 12pm
  - COUNTER5 Usage Dashboards in Alma – Oct 24 @ 12pm

- Library Leadership and Management Certification program Fall 2023 courses:
  - Library Assessment – *Oct 3 - Nov 13*
  - Universal Design for Libraries – *Oct 10 - Nov 20*
  - Access and Collection Strategies – *Oct 10 - Nov 20*
  - Leading High-Performance Teams – *Oct 17 - Nov 20*

SUNY OER Summit 2023

Virtual: Oct 11- 12

Summit aims to bring together practitioners from SUNY and beyond to explore innovative approaches, successful case studies, and emerging trends in OER

https://sunycpd.eventsair.com/soer23/

SUNY Center for Professional Development

SUNY THE STATE UNIVERSITY OF NEW YORK

SUNY OLIS:

Communities of Practice

We come together to engage, share ideas, and work toward solutions to common issues.

Current Communities of Practice:

- Library Leaders
- *New* Library Leaders
- Accessibility
- Scholarly Communications
- SUNY OER Campus Leads

- OER Advisory Board
- OLIS Advisory Board

Alma / Primo Updates

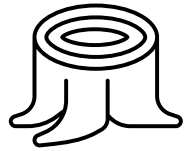
Alma/Primo Updates

Alma/Primo contract / background

- Initial contract term November 2017 to November 2022. No percentage increase for initial term. SUNY admin covered implementation fees.
- Contract included option for two additional, five-year terms. Negotiated a yearly 2% increase. Currently in the first year of second term. (11/22-11/27).
- **Recharge costs for Alma/Primo VE will include 2% increase each year for the next five years.**
- Initial PIA for Alma/Primo VE expires June 2024. Will work with business office to re-engage in new PIAs.

Alma/Primo five-year review

Alma/Primo fifth year review



Spring Semester - looking back

- Survey schools about Alma/Primo functionality
- Work with vendor on possible benchmarking services
- Review old SLC policies / adopt existing policies and best practices
- Sign new PIAs

Fall semester – look forward

- Update policies
- Vendor seminars for future plans
  - Discovery .
  - Consortial administration
- Next five years – what would that look like?

Policies / Best Practices

- Types:
  - Metadata policies
  - Resource Sharing Loan Policy
  - Acquisitions Policies
  - Collection Development Policy
  - Best Practices

- Prior policy approval:
  - Working Groups > LSP Advisory Board >SLC board

- How to handle updates to policies or adopt future policies

- Approved Policies: https://sunyolis.libguides.com/c.php?g=1040067&p=7578691

Policies

- Different approaches for different policies
  - No changes
  - Updates
    - make recommendations
    - solicit feedback from community
    - refine > re-vet >adopt
  - Vote on important policy changes
- Communication about changes will be key
- Long lead time for impactful changes
- Vetted through working groups, advisory boards
- Want to provide clear guidelines
- Standardizing look and feel, converting from PDF to LibGuides

Working Groups
& Interest Groups

Current Working Groups

Shared Metadata Standards and Policies

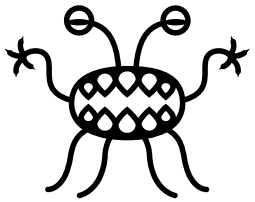
- Meets bi-weekly
- Discuss issues pertinent to cataloging
- Policies / best practices

Access Services & Resource Sharing

- Meets periodically
- Review stats
- Courier

Systems & Processes Interest Group

Systems & Processes Interest Group



- Formerly IEC working group
- Run by Angela Rhodes
- Meets monthly
- Will focus on SUNY Libraries' current processes and procedures in holistic systems management, with the goal of fostering communication between libraries and SLS to find knowledgebase gaps, survey library expertise and needs, and encourage participation in systems improvements through involvement with ExLibris and ELUNA
- Monster of the Month style (community-driven)
- Next meeting – October 2, 10:00 am – Room Booking software
- https://3.basecamp.com/3649838/projects/19295186

Interest Groups

Analytics Interest Group

- Meets monthly
- Community-led discussion
- Open project on Basecamp

Discovery Interest Group

- Meets monthly
- Community-led
- Open project on Basecamp

Institutional Repositories Interest Group

- Open project on Basecamp—feel free to add yourself!

eResources Interest Group

New Electronic Resources Interest Group

- Evolved from New Electronic Resources Librarian Cohort Pilot (2022-2023)
- Found that there was interest from people who weren't brand new
- Monthly meetings
- Will work the same as Discovery Interest Group and Analytics Interest Group: come to meetings with current questions/topics
- First Meeting will be Thursday, September 28 at 10 am.
- All-Access Basecamp where you can add yourself: https://3.basecamp.com/3649838/projects/34360444

Metadata and Cataloging

Cataloging Surveys

Two surveys to gauge cataloging/metadata needs in SUNY:

- *State of Cataloging and Metadata Services at SUNY Campuses* (for directors/heads of cataloging)

- *Cataloging Support from SUNY Library Services* (for catalogers, metadata specialists, and other practitioners)

SMSP

Lots of projects, including

- Reviewing/updating MSP policies
- Reviewing/updating Network Zone practices
- Potentially hosting cataloging “office hours”

SUNY catalogers, please join us!
https://sunyolis.libguides.com/mspwg

Fill out the cataloging survey or contact us at
info@sunyolis.libanswers.com

OCLC

- Data sync update
  - Streamlined holdings pilot
  - If your campus is interested in data sync or streamlined holdings processes, reach out to us at info@sunyolis.libanswers.com
- Small Library Edition cataloging subscription
- Connexion browser and the CatExpress user interface within Connexion browser ends April 30, 2024
- WorldShare Record Manager training

RESOURCE SHARING

Courier Updates

- New Empire Library Delivery contract went into effect on July 1, 2023
- Many SUNY libraries chose to reduce ELD service under this new contract
- SLS worked with SUNY Shared Courier Task Force to adjust our Alma rotas accordingly
  - To date, the average turnaround time for Alma borrowing requests has not increased
- SLS will meet with task force on September 27 to discuss whether rota adjustments need to be made
  - Will meet again in early 2024 and then disband task force if it is no longer needed

Resource Sharing Updates

- Added 6 new in-state partners to our Alma resource sharing rotas over the summer
  - Adelphi University, Marist College, Russell Sage College, Siena College, Vassar College, West Point
- Adding 4 Orbis Cascade libraries to our rotas
  - Oregon Health & Science University, Portland State University, University of Oregon, Washington State University
- Beginning to work with CUNY on Alma RS
  - Hope to add all CUNY libraries to our rotas in January 2024
  - Campuses will have an option to opt out
  - Non-ELD libraries will not be able to participate
- Met with Claudia Balby and Katie Burch from Ex Libris to talk more about building network

ILL eBook Pilot

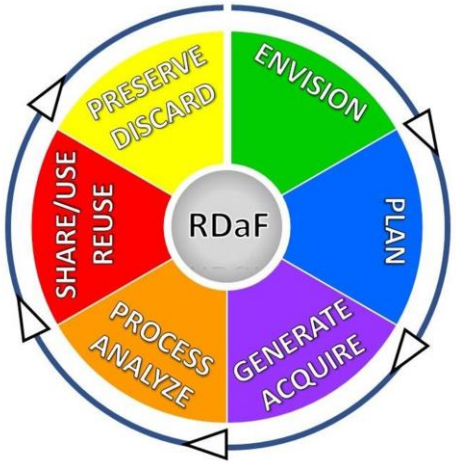
- EBook ILL pilot project will continue for a second year
- Three new publishers being added to the pilot in October
  - Cambridge Scholars Press (catalog through 2021), Boydell & Brewer (catalog through 2017), University of North Carolina (full catalog)
- SLS will be meeting with ProQuest to discuss long term business model for ebook ILL sometime soon
- SLS will also be meeting with Ex Libris sometime soon to discuss integrating ebook ILL into Alma

RESEARCH DATA MANAGEMENT

SUNY THE STATE UNIVERSITY OF NEW YORK

Research Data Management

- OLIS presentation at NIST RDaF Plenary on SUNY-created graph data model for RDM
  - Interactive prototype tool sunyoried.github.io/rdaf/
- New training series and discussion group (register now)
- ORCID initiatives
  - New ORCID LibGuide with recorded webinars of summer ORIED and OLIS co-hosted ORCID training
  - Report of the ORCID Integration Task Force included on the LibGuide
  - Funding from SUNY System is available for some campuses for ORCID membership in return for integrating use of ORCID persistent identifiers into campus systems (more details are available on the LibGuide)

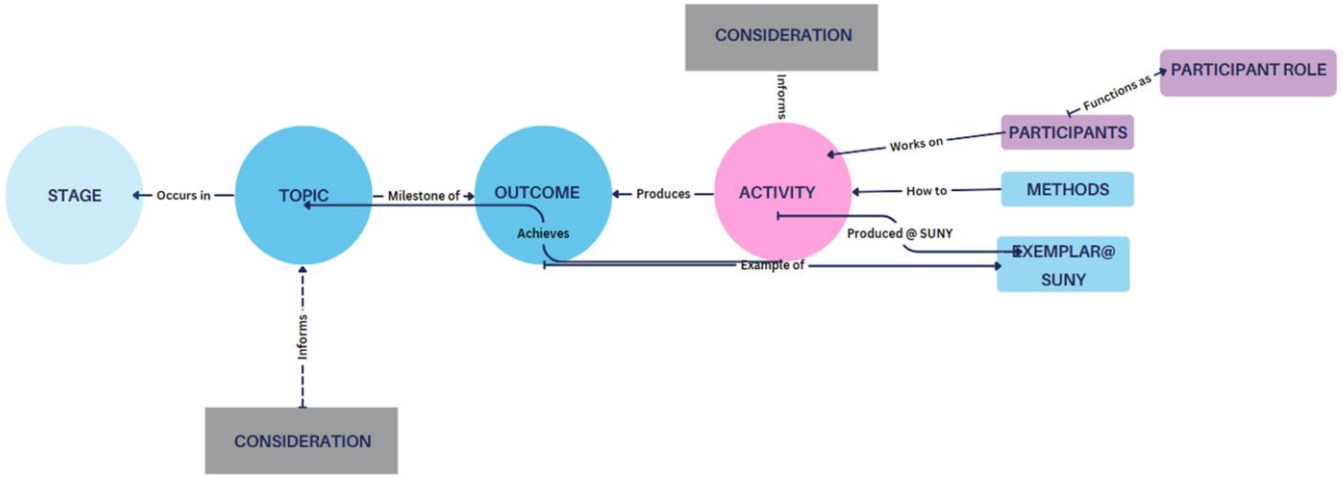


Research Data Lifecycle Stage	Topic	Subtopic	Informative References
Envision			
Plan			

Fig. 1. Partial Organizational Structure of the Framework Core

From *original framework*

To *graph data model (and interactive tool)*



REPOSITORIES

Repositories

Laying groundwork for Institutional Repositories policymaking:

- Please join us at the Scholarly Communications CoP tomorrow

- SUNY Digital Repository (SDR) has been online since 2005!
  - Audit of communities to assess content and normalize collection names
  - Contacting campus IR managers about possible migrations of content to SOAR
  - Linking out to other SUNY digital repositories

Repositories

- SUNY Open Access Repository (SOAR)
  - New batch load process allows campus IR managers to create SAF (simple archive format) files for upload
  - Empire State University's All About Mentoring, a faculty-led scholarly and creative biannual publication, now in SOAR
  - Purchase College has begun uploading Student Projects to SOAR, creatively utilizing the embargo feature and metadata to suit their campus needs

SUNY OER Services Updates

Ready to Adopt Catalog

New to the catalog:

- **Lumen One platform**
  - Introduction to Business
  - Introduction to Psychology
  - Introduction to Statistics
  - Quantitative Reasoning
- **OLI**
  - Wellstart
  - Party Science

In development through OLI:

- American Government (redesign from Candela)
- Technical Writing (redesign from Candela)
- Child Psychology *
- Social Psychology *

SUNY OER Services Summit 2023

Virtual: October 11- 12, 2023

- Keynote: Dr. Cable Green, Creative Commons
- 2 Pre-conference workshops:
  - SUNY Create
  - OLI Torus

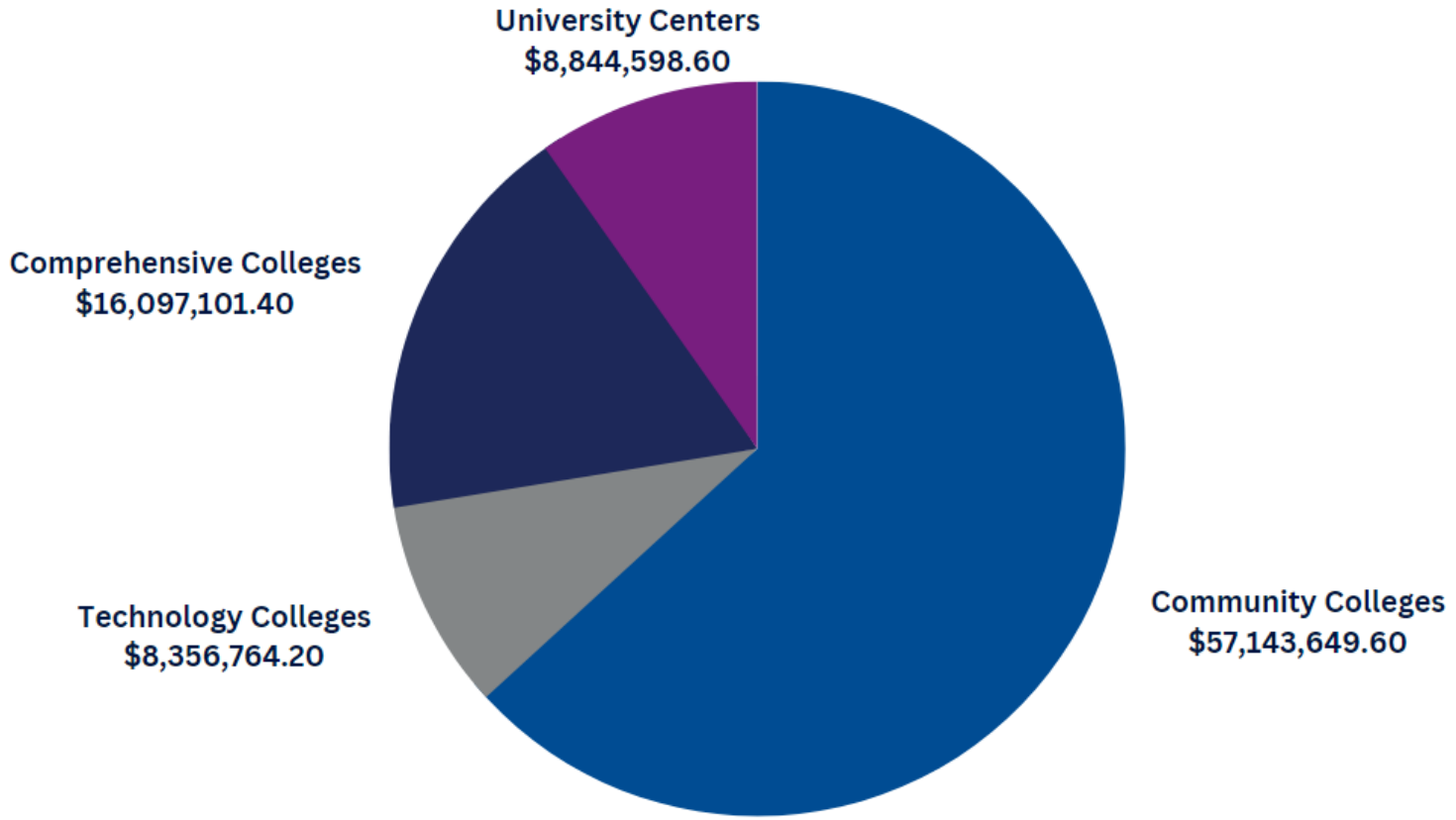
23 SUNY Sessions, 16 from outside SUNY:

- 9 Demos/Guided Discussions
- 20 Presentations
- 7 Lightning Round presentations

https://sunycpd.eventsair.com/soer23/

Annual Numbers

Over $90 million in total student textbook savings since 2017



OLIS Updates – Save the Date

Next OLIS Update:

- *Wednesday, November 29 @ 1:00pm*

Tentative dates for Spring 2024:

- *Thursday, February 29 @ 10:00am*
- *Thursday, May 2 @ 10:00am*

Questions?

Thank you