**3/31/23**

**Carolina Consortium Workloads and Responsibilities**

The CC is operated by a group of volunteers that ranges from 6-10 people at any given time. UNC Greensboro contributes about 95% of the total work, and the founder probably does about 80% of the total work of the CC. It takes about 20% of the founder’s work time to run the CC, but a new leader would probably need to spend significantly more time. If one new person tried to do all CC work themselves, it would probably require about 75-100% of their time (at least initially, until they became more familiar with the workflows and details).

Of course, new CC leadership could divide up work among many people. Or could choose to add or drop responsibilities.

Current Group Responsibilities:

The negotiating team includes

* Steve Cramer (UNCG) works with 3 CC publisher/vendor partners
* Katherine Heilman (UNCG) works with 5
* Christine Fischer (UNCG) works with 11
* Tim works with 14. Maria Collins (NCSU), Hilary Davis (NCSU), and Christee Pascale (USC) assist on the Elsevier deals.

Individuals also provide assistance with particular formats or issues. For example, Christine Fischer is the CC expert on streaming media, and Joseph Thomas (ECU) is leading the implementation and evaluation of our Read and Publish deals.

Christine and Katherine do much of the planning and organizing for the CC’s annual meeting.

The Founder’s Current CC Responsibilities:

***1.  Coordination and Leadership***

Overall Coordination of the CC (in consultation with the CC Advisory Group)

* Strategic direction (Ex. Do we want to stay an all opt-in group? Or do we want to try some all-in initiatives?)
* Negotiating strategies (Ex. Do we focus on cost savings, or on adding new deals, or adding more options to existing deals?)
* Membership criteria and growth (Ex. Would we accept AHEC libraries or Tennessee libraries if they asked?)
* Communication strategies (Ex. What kinds of things go on the email list vs the website?)
* Main point of contact for vendors presenting proposals or soliciting input on models or ideas

***2. Communication***

Managing Communication Channels

* Maintain CC website
* Maintain the long CC deals document in Box (although other negotiators are expected to edit and update the sections relating to their own deals)
* Maintain the CC email list
* Maintain the CC membership list
* Maintain the “who’s in which deal” spreadsheet
* Maintain the public list of CC deals
* Organizing and/or hosting and/or presenting CC webinars
* Upload CC datasets and webinars to the Box site

Communication with other consortia

* Coordinate with PASCAL and NC LIVE to make sure we are offering complementary services and aren’t competing with each other
* Work with ULAC, NCICU, State Library and others (Ex. The State Library stopped a state-wide subscription to ChatStaff and asked me to make it a CC deal)

Collections Advice

* Some schools contact me to ask various questions (Ex. We have a new nursing program. What’s a good nursing database? OR We want to try a big deal. Which one do you think is the best fit for our school?)

***3. Negotiating and managing deals***

Negotiating and Updating Deals (each negotiator does this for their deals)

* Help decide which deals are worth pursuing. Vendors routinely send us proposals and we can’t do them all. I sometimes ask for advice from subject experts. For example, I ask Steve Cramer whether specific business resources are worthy of becoming CC deals.
* Get best possible price.
* Investigate multi-year vs one -year.
* Consider pricing models. EX. FTE vs Sim user vs bulk buy discount. I usually use the vendor proposal as the starting point and then try to improve it.
* Set start/end dates
* Are there any existing NC/SC customers? Who? Do they get the CC discount or is the discount only for new customers?
* Do other regional consortia have extant deals for the same product? If the deal is already available to Carolina libraries, no point in creating a CC deal unless it would have much better terms.

Troubleshooting

* Help subscribing libraries when a vendor isn’t responsive to their needs (Ex. trying to get a title list of journals included in a big deal)
* Making sure libraries understand their entitlements (Ex. A library who stayed in the CC Wiley big deal for 6 years and then exited, still has ownership of those 6 years for all 1500 titles)

Licensing

* For each deal, negotiate a “vanilla” CC license that all or nearly all schools can sign
* In some cases, negotiate and sign a CC central license. Other schools can then sign a document saying they agree to be bound by the terms of the central license.
* Subscribers often have special licensing requests and wording changes. Determine which to pursue.
* Help vendors get the signatures from participants
* For multi-year deals, there must be an option to leave early.
* If the license requires a single payee, work with EBSCO.

Get quotes and trials

* For schools interested in possibly joining CC deals

Renewals

* Explain multiple renewal options (Ex. Schools had 4 Elsevier options last year)
* Get everyone’s renew/cancel decisions for bulk deals with common renewal dates (Ex. EBSCO)

Big Deal cancellation

* Maintain calculator
* Use big deal dataset to model how many and which journals a school could afford if they dropped a big deal and went title by title

Custom negotiations

* On request, I have negotiated on behalf of individual schools. (Ex. custom exit terms for schools leaving CC big deals)

***4.  Vendor relations***

Help vendors understand what types of deals the CC will offer and which don’t work for us.

Assist vendors with contacting unresponsive CC subscribers

Assist vendors when subscribers aren’t understanding a deal they are in. (This is particularly true of big deals)

Serve on vendor advisory boards, and provide feedback on new ideas and models

Distribute product information to membership

Selectively offer vendor webinars

Make sure vendors understand which CC communications are OK and which aren’t. Ex. We don’t share the CC email list with vendors, but they can send us info to distribute

***5. Infrastructure, Data, and Annual Meeting***

CC Infrastructure and Documentation

* The CC public website is housed on the UNCG Libraries server. UNCG did the logo design and “look and feel” of the site.
* The CC negotiating team documentation and email list are housed on a UNCG Libraries server (Ex. The email list). These items are shared only within the UNCG team.
* The CC’s confidential documents are in a Box account associated with UNCG
* UNCG’s copies of the CC licenses are housed on a UNC server. Although other schools should have a copy of anything they have signed, we do get requests to send schools copies of our license.
* Historic CC info is housed on a UNCG server (Ex. when a particular school joined a particular deal and what the terms were at that time)
* UNCG hosts the CC Meeting
* Many 1000s of CC emails are in the founder’s UNCG email account. Many have info not found elsewhere.

Data

* CC Big deal dataset
  + Harvest data from vendors every March
  + Populate dataset, normalize data, and investigate issues
  + Present to membership at annual meeting
  + Send “red flag” and “yellow flag” emails every summer
* Cost avoidance for the CC collectively and for each member
  + Compiled every other year (in odd years)
  + Reports sent to each member that has significant savings
  + Probably takes about 40 hours total

Annual Meeting

* Planning, including securing the venue, catering, registration, sponsorship fees, and advertising to vendors and members. This work is shared among more than a half dozen UNCG employees.
* Programming the main session, soliciting calls for breakout sessions and organizing the vendor Premiers and vendor hall experience.