

CARLI E-Resources Brokering Program Values

Proposal Process:

- Vendor fills out proposal form: <https://www.carli.illinois.edu/products-services/eres/vendor-propose>
- Commercial Products Committee (CPC) evaluates proposal for inclusion; gives an advisory recommendation to CARLI. Commercial Products Committee is composed of librarians from a diverse group of CARLI members. Charge: https://www.carli.illinois.edu/governance/committee-directory/comm?comm_id=41&constit=no&dates=yes
- CPC is most interested in products that would be of interest to a wide variety of CARLI member institutions with workable pricing. Vendors may want to reach out to CARLI members before submitting a proposal to inform our community about product offerings; if CARLI has been told by our libraries that there is interest, proposals usually have an easier evaluation process.

What we need from vendors:

- CARLI's proposal form. The data in this form is considered public information.
- Product list pricing model. Send this separately. It is confidential between CARLI staff and CPC.
- Consortial discount from list pricing model.
- List of current subscribers among CARLI membership.
- An assurance that existing customers will get an incentive or discount for moving to a consortial license.

How We Work:

- The E-resources Brokering Program primarily works with products falling under the library content exemption of Illinois Procurement Act: "Procurement expenditures for periodicals, books, subscriptions, database licenses, and other publications procured for use by a university library"
<https://www.ilga.gov/commission/jcar/admincode/044/044000040A00130R.html>). Products that are not library content, but tools, must go through a separate, labor-intensive RFP process that is outside the scope of the brokering program.

- Vendors are assigned one of 2 cycles, either Fiscal Year (July 1 - June 30), or Calendar Year (Jan 1 - Dec 31). Cycle determination is based upon numerous factors, including CARLI work load, nature of the subscription, and vendor preference.
- Contracts take considerable time to negotiate and process as they are reviewed by CARLI staff, University of Illinois Purchasing, and Legal. We start the process approximately five months before the start of a contract term. CARLI also wants to make sure the level of participation is at least 10% of member libraries and the discount is substantial enough to make a contract worth CARLI staff time.
- CARLI contracts are typically for 5 years, with libraries making an annual subscription commitment. We do not have multi-year commitments.
- Most of our contracts are for subscription content. We can include one-time purchases by libraries if there is sufficient interest.
- We currently have no funding for additional centralized subscriptions or consortial purchases. All contracts are opt-in by individual libraries.

Things we value:

- Open, prompt, and professional communication between CARLI, libraries, and vendors.
- Ability to prorate subscriptions if a library desires to subscribe after start of fiscal/calendar year.
- Transparent pricing: pricing should be based upon an externally vetted variable (we strongly prefer full time enrollment data from the Illinois Board of Higher Education). Complicated pricing formulas based on other variables must be disclosed.
- We ask vendors to offer CARLI the lowest pricing available in Illinois; pricing can match another consortium, but we cannot enter an agreement if libraries can get better pricing elsewhere.
- CARLI does not give discounts for multiple subscriptions without approval. We also do not allow one-time discounts because discounted pricing should be available to all libraries and becomes the new base price.
- We negotiate price caps in all contracts, so libraries have predictable annual increases. Our goal is for increases to be less than 5%.
- No personal or library accounts or click through licenses required to access a resource.

- Accessibility and privacy are very important to Illinois libraries, and appropriate language must be included in all contracts.
- Further details: <https://www.carli.illinois.edu/products-services/eres/licensing-principles>

What we provide to vendors:

- Streamlined and transparent communication, pricing, commitments, and invoicing; you only need to send CARLI one invoice for all subscriptions, and CARLI will process a single check.
- One license covers all libraries that are CARLI Members.
- Centralized information and pricing portal with our Selection System.
- Access to our members' e-resources contacts at <https://www.carli.illinois.edu/membership/mem-libs>
- We can forward communications to our members' listserv including product information and professional development.
- CARLI staff provide first level support for many customer questions, reducing libraries' need to contact vendors.
- Advice; CARLI has worked with many vendors and libraries over the years. We can tell you what has worked and what has not among Illinois libraries. CARLI also has a good understanding of member library resources.

What we do not provide:

- Sales work. We're happy to pass on basic information, but vendor sales representatives know their products better than we do.
- CARLI does not organize trials for members. In the past, trials have been centralized by the Illinois State Library. We currently encourage libraries to work directly with a vendor to trial products.