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Shared Service Update

2014 ABC Copyright Conference, May 26

Presented by :

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A photograph of a concrete surface. On the right side, there is a single, vibrant red maple leaf with a long stem. To the left of the leaf, there is a large, irregular, yellowish-brown stain on the concrete, which appears to be a residue from a leaf. The concrete has a speckled texture with small blue and grey flecks.

**Copyright obligations
have always existed.**

Photo used with permission from Michelle Lamberson



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BC Post-Secondary Administrative Service Delivery Transformation

Opportunity Assessment Final Report

February 12, 2013



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Opportunity Profile – Copyright

#	Potential Opportunities	Quantitative Benefits and Investments				Tier
		Benefits		Investments		
		Low	High	Low	High	
1	Establish a Centre of Expertise at UBC					Tier 1
		Due to rapid changes in the copyright environment and uncertainty about future requirements, estimating benefits will require detailed analysis and discussions with stakeholders.		Level of investment required is uncertain at this time.		
2	Create a shared legal service for copyright issues.					Tier 1
		Magnitude of benefits will depend on the future needs of institutions and the volume of hours of legal advice required.		Effort will be required to determine volumes and negotiate a joint retainer with a law firm.		
3	Explore joint procurement of rights management software.	\$7,000*	\$19,000*			Tier 1
				Effort required to consolidate requirements and negotiate a joint purchase.		
	TOTAL	\$7,000*	\$19,000*	* Plus one-time cost avoidance of \$45,000 to \$60,000		

Primary benefit driver	<ul style="list-style-type: none"> • Copyright COE: Institutions avoid cost of creating and managing their own copyright office. Consistency of practice, increased access to specialized services and reduced duplication of efforts. • Shared copyright legal service: Reduced hourly rates. Consistency of practice, increased access to specialized services and reduced duplication of efforts. • Rights management software: Leveraging the buying power of the post-secondary sector to achieve discounts on implementation and maintenance costs.
Institutions most likely to benefit	<ul style="list-style-type: none"> • Copyright COE: All institutions who choose to participate should benefit, but those who have opted out of the Access Copyright model license or those who lack dedicated copyright personnel may benefit most • Shared copyright legal service: Institutions without in-house copyright legal counsel and those who anticipate purchasing a high volume of hours of legal advice will benefit most • Rights management software: Larger institutions planning to invest in this software will benefit from discounts; those planning to operate without the software will not.



Opportunity Profile – Copyright

Qualitative Benefits	Opportunity Risks
<p><u>Copyright Centre of Expertise</u></p> <ul style="list-style-type: none"> A collaborative approach to copyright across the sector will encourage consistency of practice and standardization Centrally-developed policies, procedures, and education for faculty and students will eliminate duplication of effort and churn Providing access to copyright experts and specialized services will alleviate the strain on smaller institutions that lack dedicated resources for this function The COE would provide a more comprehensive service to allow institutions to handle all their copyright clearance and compliance in an effective and efficient way <p><u>Shared Legal Services</u></p> <ul style="list-style-type: none"> Collaboration to negotiate a joint retainer (based on a minimum volume of hours at reduced rates) will improve access to legal advice for those institutions without the resources to independently engage legal counsel <p><u>Joint procurement of Rights Management Software</u></p> <ul style="list-style-type: none"> Collaboration to procure the same software will encourage consistency of practice and standardization 	<p><u>Copyright Centre of Expertise</u></p> <ul style="list-style-type: none"> The copyright landscape is changing at a rapid pace; assumptions and decisions made today may not be valid 6-12 months from now A significant degree of uncertainty exists with respect to the future of copyright in Canada Threat of litigation for non-compliance is a serious risk to those institutions who have opted out of the Access Copyright model license There may be resistance to UBC offering services to other institutions, and fear that their issues would not receive the same attention or priority as UBC's The needs of institutions may vary greatly and a risk of cost or use inequity exists Copyright issues are often highly time sensitive and a shared service may not be responsive enough to meet institution deadlines <p><u>Shared Legal Services</u></p> <ul style="list-style-type: none"> Some institutions may prefer to seek out their own independent legal advice; fewer participating institutions may lower the discounts obtained <p><u>Joint procurement of Rights Management Software</u></p> <ul style="list-style-type: none"> Some institutions may decide they are able to operate without software to assist with copyright clearance and compliance; fewer participating institutions may lower the discounts obtained



Opportunity Profile – Copyright

Implementation Risks and Considerations

Copyright Centre of Expertise

- A significant degree of uncertainty exists with respect to the future of copyright in Canada
- The copyright landscape is changing at a rapid pace; assumptions and decisions made today may not be valid in 6-12 months
- Threat of litigation for non-compliance is a serious risk to those institutions who opted out of the Access Copyright model license
- There may be resistance to UBC offering services to other institutions, and fear that their issues would not receive the same attention or priority as UBC's
- The needs of institutions may vary greatly and a risk of cost or use inequity exists
- Copyright issues are often highly time sensitive and a shared service may not be responsive enough to meet institution deadlines
- UBC has invested in human resources, technology and other infrastructure to meet its own copyright clearance and compliance requirements; additional investments will be required to accommodate the needs of those institutions who use the shared service
- Service Level Agreements (SLAs) will need to be determined to ensure institutions will receive appropriate prioritization and attention
- A pilot approach involving a smaller number of institutions to test out the shared service and identify issues would reduce risk and disruption

Shared Legal Services

- Some institutions may prefer to seek out their own independent legal advice; fewer participating institutions may lower the discounts obtained
- The copyright working group that was recently formed in B.C could work together with stakeholders to determine requirements and negotiate a joint contract with a single legal firm

Joint procurement of Rights Management Software

- BCELN could work with libraries to help determine which institutions will participate and to standardize requirements to allow for negotiation of a joint contract.
- Individual institutions would be responsible for implementation and integrating the rights management software with existing technology as needed
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- Individual institutions would be responsible for implementation and integrating the rights management software with existing technology as needed



Permissions Service

UBC Scholarly Communications and Copyright Office

- IP & Copyright Librarian
- Rights & Permissions Manager
- 3 Rights and Permissions Assistants

Devin Soper, Copyright Services Librarian

devin.soper@ubc.ca or ubc-copyright@interchange.ubc.ca 604-827-2006

Devin oversees the daily operations of the Scholarly Communications & Copyright Office. His role involves liaising with academic faculties and departments, coordinating campus instruction on copyright and author rights, responding to copyright-related questions, and investigating the copyright status of selected materials. He provides operational assistance to the Director, Library Digital Initiatives in the provision of copyright and intellectual property services to UBC users.



Devin Soper

Bryan Beck, Rights & Permissions Manager bryan.beck@ubc.ca | 604-827-2492

Bryan manages the Rights & Permissions service. His role is to process faculty and instructor requests for copyrighted materials for use in course instruction and library course reserves. His position liaises with Library course reserves, Library branches, and the UBC Bookstore to promote access to required course materials that are not currently held within the Library's collections.



Bryan Beck

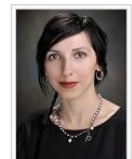
Rights & Permissions Assistants

natalia.melikhova@ubc.ca | 604-827-5619
simonida.jocic@ubc.ca | 604-822-6742

Natalia and Simonida assist the Rights & Permissions Manager to process faculty and instructor requests for copyrighted materials for use in course instruction and library course reserves.



Natalia Melikhova



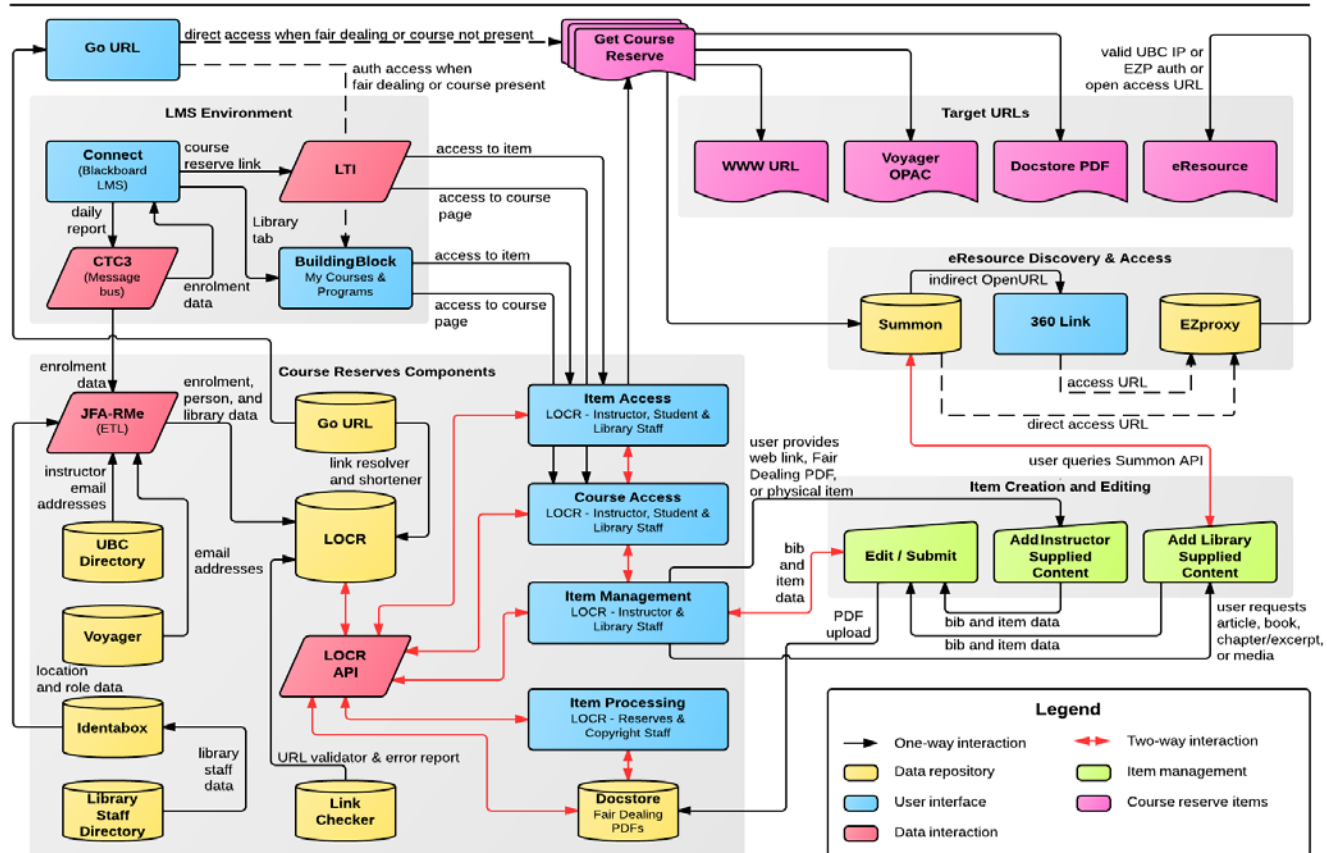
Simonida Jocic



LOCR – Library Online Course Reserves

UBC Library Course Reserves Ecosystem and Workflows

Paul Joseph
April 7, 2014



LOCR - Copyright Workflow

LOCR leverages new workflows in Copyright...

- secure PDF upload and storage
- distinguish between Fair Dealing, Permissions, Public Domain, and Licensed materials
- auto-generated cover sheets
- system deletes PDFs 30 days after course end



LOCR - Instructor Course Home

Switch to Student Mode

8

1

2

My Practice Course - Jonathan Strang

The permanent URL to this course is: <https://go.library.ubc.ca/fth4b5>

Course Home

Add Reserve Items

Need Help?

You are currently **SUBSCRIBED** to this course, and will receive notifications when new readings are available.

Unsubscribe

3

Readings

Print Reading Lis

Search:

9

5

6

7

ID	Title	Format	Author	Available Until	Status	Tags	Actions	Permanent URL
16368	Canadian political philosophy: contemporary reflections		Norman, W. J;Beiner, Ronald	2015-01-31	Awaiting Course Reserves Processing	textbook	View Edit	https://go.library.ubc.ca/jcjDV
16369	The Fighting Civil Servant: Making Sense of the Canadian Superhero The American Review of Canadian Studies		Bart Beaty	2015-01-31	Electronic Article Available Online		View Edit	https://go.library.ubc.ca/zMnd

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LOCR - Adding Items

Course Home

Add Reserve Items

Need Help?

Place Items on Reserve for My Practice Course – Jonathan Strang

Requests for Library items may take up to 14 days to process depending on the time of year/branch

Library Content



Article



Book



Chapter/Excerpt



DVD/CD &
Streaming Media

Instructor-Supplied Content



Web Resources
(e.g. blogs, news, YouTube)



PDF Upload



Physical Item

Search the Library's Collections

Search

Advanced Search

Previous Courses

If you would like to import items from a current or recently completed course which does not appear in your list of previously taught courses below, please contact your [course reserves branch](#) for assistance.

CourseID	Title		Number of Items	Copy
28829	My Practice Course – Jonathan Strang	<input type="button" value="Toggle Item List"/>	4	<input type="button" value="Copy Items"/>



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LOCR – Item Records for PDFs

Chapter 6

Item ID: 20639 - PDF

Send Item to Copyright

ITEM COPYRIGHT DETAILS

Page Count

Entire Work

Percentage of Work

21 pages

239 pages

8.79 %

Upload/Replace PDF

Copyright Determination

Not Determined

Fair Dealing (Short Excerpt)

Permission of Rightsholders

Library Licensed

Public Domain

Additional Copyright Information For Coversheet

n/a

Copyright Notes

STZWNB3E6201 (1397167028): Single chapter of a work owned by the library

Add to Copyright Notes

n/a


Save Changes

ACCESS URI(S)

Can't add DocStore URLs

Staff DocStore Access

The following link allows staff to verify a DocStore URL without having to pass through Connect. Do not share.

Internal PDF Access 

UBC Go URL

<https://go.library.ubc.ca/tkf5D5>

Primary URL (e.g. from Summon or DocStore)

<https://docstore.library.ubc.ca/download> [Visit](#) [Edit](#)



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LOCR - PDF Coversheets



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Vancouver Campus



F a i r D e a l i n g (S h o r t E x c e r p t)

Article Title: Chapter 6

Author: Ripley, William Zebina

Publisher: Arno Press Publication Date: 1973 [c1927] Pages: 12-45

Course: Library Demo 101

Course Code: --- Term:

Department:

Copyright Statement of Responsibility

This copy is made solely for your personal use for research, private study, education, parody, satire, criticism or review only. Further reproduction, fixation, distribution, transmission, dissemination, communication, or any other uses, may be an infringement of copyright if done without securing the permission of the copyright owner. You may not distribute, e-mail or otherwise communicate these materials to any other person.

For more information on UBC's Copyright Policies, please visit [UBC Copyright](#)



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Embedded Rights and Permissions Service

- Cleared permissions for over 600 UBC courses during 2013/14 fiscal year
- Enhanced workflows with Permissions staff and with Course Reserves staff

	Courses
2013, Summer	67
2013, Fall	283
2014, Winter	245



Working with SFU

The SFU Bookstore and the Centre for Online and Distance Education (CODE) have been participating in a trial of the UBC Copyright Clearance Service since July 2013.

		Courses/Permissions
2013, Fall	CODE	5
	Bookstore	7
2014, Winter	CODE	7
	Bookstore	3
2014, Summer	CODE	1
	Bookstore	11



Working with SFU

- The Bookstore and CODE are happy with the service and do not report any concerns with the work done by UBC. Both units intended to use multiple sources for copyright clearances, with UBC being just one choice of many. However, during the trial CODE was sufficiently pleased with the UBC Service that they now send all their copyright clearances for textual materials through the UBC service.
- Overall SFU has been very pleased with the level of service provided by UBC and is eager to continue this mutually beneficial relationship.

from *SFU Comments on UBC Copyright Clearance Service*



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Shared Service - Description

The Shared Permissions Service provides expertise in processing and obtaining copyright permissions for course instruction needs at partner institutions in British Columbia. We can:

- Contact rightsholders and obtain permissions on your behalf
- Track requests and escalate requests with non-responsive rightsholders
- Pay all required invoices and send you a single invoice
- Manage your records securely in our permissions database

Our services are intended to support your operations so you can focus on managing and delivering requested content.



Shared Service - Challenges

Clearing permissions can be challenging work:

- The rightsholder denies permission for the amount requested or the intended use case
- The organization holding the copyright for the work no longer exists.
- Publisher is slow to respond and does not hold the copyright requiring a permission request to a new party
- The rightsholder cannot be located



Shared Service – Expanding from SFU

Example 1: 100% FTEs participating

Institution A with 7,000 FTE – $7,000 \times \$0.34 = \$2,380$ – Participation cost

Institution B with 1,500 FTE – $1,500 \times \$0.34 = \510 – Participation cost
\$600 minimum

Example 2: 75% FTEs participation

Institution A with 7,000 FTE – $7,000 \times \$0.47 = \$3,290$ – Participation cost

Institution B with 1,500 FTE – $1,500 \times \$0.47 = \705 – Participation cost

Example 3: 50% FTEs participating

Institution A with 7,000 FTE – $7,000 \times \$0.70 = \$4,900$ – Participation cost

Institution B with 1,500 FTE – $1,500 \times \$0.70 = \$1,050$ – Participation cost



Moderated Knowledge Base

- Interested Universities jointly retain a law firm
- The firm establishes a confidential website accessible to institutional copyright leads, including:
 - Discussion Forum
 - Mechanism to refer questions a lawyer for advice
 - Repository/Archive
 - Legal advice given
 - Vetted discussion threads and answers
- Each university contributes to the costs





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Create.



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