CLA Second Extract Permissions Service and EHESS

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UKSG FORUM
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CLA Permissions Solutions

Second Extract Permissions Service

• CLA HE Licence permits copying of one chapter/article per course
• New Second Extract Permissions Service launched in August 2015
• Optional service for UK Higher Education customers
• Top-up transactional permissions service for clearance of second extract from a published work where the first has been copied under the CLA licence
• Offered through CLA Check Permissions
• Opt-in, non-exclusive channel for publisher permissions
• Publisher-set pricing managed via PLS
• Just under 80% of publishers by value signed up
• 86 UK HEIs signed up to use the service
• 186 transactions to date

“The Second Extract Permissions Service has speeded up the process of seeking additional permissions from start to finish. It has certainly improved the team’s efficiency.”

Stuart Scarles, Senior Library Assistant, E-Resources Team, Edinburgh University.
CLA Content Solutions

Licence Plus

- Content solutions developed after extensive research into needs of key CLA customer sectors
- Partnership with the British Library
- Bundling of document delivery service and blanket CLA licence
- NHS England Licence Plus launched April 2015
- Fixed number of articles delivered DRM free to NHS libraries at no additional cost
- Free to share and store articles under terms of CLA licence
- Data on documents supplied helps CLA to distribute licence royalties fairly to authors and publishers, in a way that takes into account digital subscriptions
Content Solutions: Licence Plus

Customer Portal

Document supply Pre Paid

<table>
<thead>
<tr>
<th>Account start</th>
<th>Purchase amount</th>
<th>Remaining balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wednesday, 1 April 2015</td>
<td>€121,929.02</td>
<td>€103,362.71 as of Friday, 29 May 2015</td>
</tr>
</tbody>
</table>
# Content Solutions: Licence Plus

## Customer Portal

### Transaction History

Please fill out the following details by entering a transaction date range or invoice number.

<table>
<thead>
<tr>
<th>Service order:</th>
<th>Pre Paid - Document supply</th>
</tr>
</thead>
<tbody>
<tr>
<td>From:</td>
<td>29/05/15</td>
</tr>
<tr>
<td>To:</td>
<td>30/06/15</td>
</tr>
<tr>
<td>Invoice no:</td>
<td>0000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date</th>
<th>Purchase</th>
<th>Identifier</th>
<th>Title</th>
<th>Invoice</th>
<th>Paid</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>29/05/2015</td>
<td>01221450-001</td>
<td>0340-6245</td>
<td>Thrombosis and haemostasis : international journal</td>
<td>580903</td>
<td></td>
<td>£29.80</td>
</tr>
<tr>
<td>29/05/2015</td>
<td>01229343-001</td>
<td>0636-5890</td>
<td>The orthopedic clinics of North America.</td>
<td>580903</td>
<td></td>
<td>£27.50</td>
</tr>
<tr>
<td>29/05/2015</td>
<td>01221047-001</td>
<td>0266-8130</td>
<td>The Professional nurse.</td>
<td>580903</td>
<td></td>
<td>£29.80</td>
</tr>
</tbody>
</table>

**Total**

£87.10

Price includes service charge but excludes VAT

Download CSV
BLDSS ➔ British Library On Demand
Supporting the Living Knowledge Strategy

VISION: To unify British Library online information services to enable greater awareness, understanding, access and use of the British Library’s collections
Higher Education Scanning Service (HESS)

• What is HESS?
  – Support reading lists/course packs with UKHE
  – Works with the CLA licence

• How does the service work?
  – Outsourced scanning for items held in your collections
    • All scanning
    • Capacity management for busy times
    • Fits in with workflows
  – Copyright Fee Paid scanning for items not in your collections
    • Copyright compliant copy for use under CLA licence
eHESS trial

- 4 universities part of the trial
- Trial was due to run for 4 weeks from the beginning of November
- Increased to 3 months to receive higher volume of requests
- Higher quality scans plus OCR
- Outputs of the trial were
  - Feedback on quality of scans
  - Feedback on quality of OCR
  - Test of ease of ordering and integration with existing workflows
  - BL understanding of costs and turn round times of high quality digitisation at volume
  - Engagement with the sector on next steps including proposed pricing for high quality scans with OCR
Results from the trial – request numbers

<table>
<thead>
<tr>
<th></th>
<th>Satisfied</th>
<th>Failed</th>
<th>Total</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nottingham</td>
<td>110</td>
<td>7</td>
<td>117</td>
<td>17%</td>
</tr>
<tr>
<td>Lincoln</td>
<td>9</td>
<td>0</td>
<td>9</td>
<td>1%</td>
</tr>
<tr>
<td>Manchester</td>
<td>376</td>
<td>154</td>
<td>530</td>
<td>79%</td>
</tr>
<tr>
<td>Portsmouth</td>
<td>12</td>
<td>1</td>
<td>13</td>
<td>2%</td>
</tr>
<tr>
<td>Total</td>
<td>507</td>
<td>162</td>
<td>669</td>
<td>24%</td>
</tr>
</tbody>
</table>

![Bar chart showing request numbers for Nottingham, Lincoln, Manchester, and Portsmouth]
Results from the trial – outsourced scanning and Copyright Fee Paid

<table>
<thead>
<tr>
<th></th>
<th>Failed</th>
<th>Satisfied</th>
<th>Total</th>
<th>% of Total Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Copyright Fee Paid Service</td>
<td>32</td>
<td>56</td>
<td>88</td>
<td>64%</td>
</tr>
<tr>
<td>Outsourced Scanning Service</td>
<td>130</td>
<td>450</td>
<td>580</td>
<td>78%</td>
</tr>
</tbody>
</table>
Feedback from trial users – satisfaction with service

HESS Trial Result

- **5** very satisfied
- **4** – mostly satisfied
- **3** neither satisfied nor dissatisfied
- **2**- Somewhat dissatisfied
- **1** - dissatisfied
Feedback from trial users – which service factors are most important?

**HESS Trial Result**

- **Ease of use of the...**
- **Quality of OCR provided**
- **Quality of scans provided**
- **Speed of delivery**
- **Compliance**
- **Range of material available**
- **Cost**

- 3 - neutral
- 4 - very important
- 5 - Critical factor
Higher Education Scanning Service

**HESS** *(Higher Education Scanning Service)*

- Copyright Fee Paid and Outsourcing
- DRM Free
- Scanned as standard quality using document supply workflow
- No OCR
- Standard service turnaround
- Pay using BL document supply account

**EHESS** *(Enhanced Higher Education Supply Service)*

- Copyright Fee Paid and Outsourcing
- DRM Free
- Scanned as high quality using preservation-standard workflow
- OCR as standard
- 48 hour service
- Invoice via CLA

www.bl.uk
How much will it cost

<table>
<thead>
<tr>
<th>Service</th>
<th>Pay monthly</th>
<th>Advance payment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Born digital</td>
<td>£5 plus copyright fee</td>
<td>£5 plus copyright fee</td>
</tr>
<tr>
<td>CFP supply from print</td>
<td>£8.20 plus copyright fee</td>
<td>£7.50 plus copyright fee</td>
</tr>
<tr>
<td>Outsourced scanning from print</td>
<td>£8.20</td>
<td>£7.50</td>
</tr>
</tbody>
</table>
CLA Workflow Solutions

CLA Higher Education Licence

- All UK HEIs hold CLA licence permitting copying of 5% or one chapter/article from millions of publications
- Census reporting: all copied extracts must be reported to CLA annually on spreadsheets by librarians
- Renewal of scans annually
- Duplicate digitisation across HE sector
- Analogue, manual process aided by some third party workflow tools (££)
CLA Workflow Solutions

CLA Higher Education Licence – the future...

Digital Content Store
What is the Digital Content Store?

• A centralised, secure, CLA-operated content store for HEIs to store digital copies created under the licence, rather than on individual institutions’ repositories
• It will be **included** in the CLA annual licence fee for HEIs and will **remove the need** for census reporting
• It will be a **platform** for future CLA products and services
Workflow Solutions: DCS

User workflow

Librarian → Search → Digital Content Store (DCS) → Results → Upload file → Clean-up service → Link generation → Access content → Students

Order from British Library → Use file in DCS
Benefits to Customers

HEIs using the DCS will no longer need to:

- Provide census reports to CLA
- Subscribe to third party software used to administer CLA census reporting
- Check if an existing scan is required for the next academic year (weeding)
- Duplicate scanning across the sector
- Seek coursepack permissions from multiple sources
- Digitise works themselves (if they do not wish to)
Workflow Solutions: Integrated DCS

Library Management System

Check ownership

Access content

Virtual Learning Environment

Digital Content Store

Get student numbers

Access content

Students Record System

Access content

Reading List System
Key DCS Milestones

- February 2015: work began with technology partner: Cloudspring Technologies (Kortext)
- June 2015: Five partner HEIs selected
- August 2015: launch of first iteration to development partners
- June 2016: full launch to HE sector
- August 2016: new HE Licence launch
Future Licensing Solutions

- Content Solutions
  - Licence Plus & EHESS

- Blanket and Transactional Licensing
  - Second Extract Permissions

- Workflow Solutions
  - Digital Content Store