



ADVISOR INTERVIEWS

An Interview with Sam Brooks, Executive Vice President, EBSCO Information Services

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By Dennis Brunning (*Contributing Editor, The Charleston Advisor*)

<brunning@asu.edu>

In our last issue, we began the interview with a question about a competitor's busy M&A year. EBSCO Information Services has been busy too. Give us a succinct rundown of your new add-ons and feel free to tell us how they fit in your mission and how these acquisitions serve libraries.

Whether it is hiring the best people possible, or acquiring companies with great employees and excellent products, EBSCO is always looking toward avenues for improvement. Becoming better at what we do benefits our customers. In fact, it was a few of our customers who recommended several of the most recent acquisitions. EBSCO has 21 advisory boards with a total of approximately 370 board members (all librarians), and these participants have become very good at understanding our mission and helping us find opportunities for improving our portfolio of products for libraries. Our two most recent acquisitions are YBP Library Services and LearningExpress.

YBP is based in Contoocook, New Hampshire, which is not far away from our international headquarters in Ipswich, Massachusetts. YBP is the largest and highest quality provider of book acquisitions and collection development services to academic libraries. EBSCO was already the largest provider of journal acquisitions and management, and with this acquisition, the majority of academic libraries now buy and manage both their journals and books through EBSCO. As a result, we will be able to auto-populate holdings information for both journals (and e-journals) and books (and e-books) into our platform, allowing a superior end-user experience for products like EBSCO Discovery Service (EDS) and EBSCOhost. We have also increased the resources and funding available to YBP in order to make improvements that can allow us to better serve customers of YBP's GOBI. In addition, EBSCO will continue to allow the world's e-book aggregators to sell their e-books via YBP's GOBI, even if they are competitors of EBSCO. This is part of our mission to allow our customers choice, while providing them options for interoperability, bringing about a better user experience.

LearningExpress empowers college and university libraries to assist students in achieving lasting academic and career success by providing a vast array of online tools. LearningExpress provides the most wide-ranging selection of academic and career-related eLearning resources available in one platform. It includes academic skill building in reading, writing, math, and science; standardized test preparation; soft skills training; job search and career resources; professional licensing and certification test preparation; and much more. We see the LearningExpress offerings as a unique complement to the EBSCO product line, full of value for academic libraries that are not yet LearningExpress customers.

Intellectual capital of M&A and other hiring certainly expands your capacity to innovate and deliver. How has expansion improved

and extended EBSCO Information Services' ability to help and serve its customers?

We have built up tremendous technical development power that is unprecedented in the library world, and these resources have been applied to innovative projects that will help us serve our customers in a much improved way. For example, there is no comparable search and relevance development team in the library community. As a result, EBSCO Discovery Service (EDS) customers can provide their students, faculty and researchers with a superior experience that has been built through countless innovative projects and continues to receive tremendous focus and investment by EBSCO. None of this could have been done without the hiring you reference in your question. We are fortunate to be based in the Boston area where we can draw from a pool of candidates from top universities and technology companies.

Another example of innovation is EBSCO's recent entry into the area of digital magazine replicas. This service is called Flipster (<www.flipster.com>) and allows students to browse the latest issues of popular magazines on library computers or their own personal laptops or tablets. There are consumer market services that offer something similar, but their library versions lack the most important magazines; EBSCO has worked with the top publishers to gain permissions for library users. The software for this service is very different than any of our other products, and magazines that are often only available in text-only format via databases are offered in full-image format via Flipster. This service has the ability to help draw students to the library Web site and into the library.

Without providing too many examples, I would be delinquent if I didn't at least briefly touch on another important and somewhat recent acquisition: Plum Analytics. When Plum became part of EBSCO, we added President Andrea Michalek and her extremely talented team, as well as products with huge potential to help our customers. For example, PlumX Metrics helps colleges and universities get more value from their institutional repositories by embedding metrics about their research directly into the IR. These metrics relate to different versions of the same article (not just the one in the IR), so the university's authors can see the impact and reach of their research in just one place. PlumX also has a suite of four other products which serve both academic libraries and offices of research.

In as few words as possible, what is the customer's experience as sought for by EBSCO? Is there a unifying theme, a discernable DNA, or other moj-o that defines the EBSCO experience? For example, some of us love EBSCO's blue. What's the story on blue?

Perhaps above all, we want the user to be successful at what they are doing, regardless of who they are and which service they are us-

ing (e.g., a researcher using EDS, or a librarian using YBP's GOBI). When it comes to student researchers, their level of success reflects directly on the library. If it is a great experience, they come back—and may even tell their friends. We know that users want a simple, expedient, fruitful experience when engaging the library. When you consider discovery, we've found this to mean getting the most precise, quality rich and relevant results right away. When you stack EDS up against other discovery services, it is this factor that stands out more than anything else. When the user succeeds, the library succeeds, and this is good for everyone.

As for the color blue, you're right that this has always been the EBSCO color. It predates my time with the company, but it's referred to as "true blue," which represents stability, reliability, dependability, and dedication. I suppose it symbolizes that EBSCO remains steadfast in its approach. For more than seventy years, the company's goals have been focused on providing value for its customers over the long term. The company's owners and leaders are in it for the long run. True blue seems a fitting color.

Anecdotal data and ears to the ground confirm Google and Google Scholar are starting points of choice among many academic users. In general, how can libraries—and their industry—compete with this? Specifically, what is EBSCO's strategy? Is Google a problem or a challenge?

EBSCO allows Google and Google Scholar to crawl our full-text data, and we drive substantial traffic to library resources through our efforts here. Many users search Google (or Google Scholar) first, and we are working to ensure they can get to each library's best possible results.

Google is a convenient way for EBSCO and libraries to expand their usage, but it should not be the only access point. One of EBSCO's missions is to help libraries upgrade their Web sites, so they can compete for the attention of end users with Google. Very few people only use Google; most are willing to also start elsewhere if that other starting point is doing things that Google can't do. EBSCO Discovery Service (EDS) was created specifically to do this. EDS makes the library Web site a simple experience with great power. We do many unique things to make this happen. For example, EBSCO employs a very large and very skilled team of search developers and taxonomists who are leveraging the library community's quality subject indexing and thesauri from many content providers in order to provide better results for end users, with a customized experience for every library, built around their own holdings. EDS is currently used by more than 8,000 libraries worldwide, which is more than all the other discovery services combined. In addition, if you look at the Academic Ranking of World Universities or the US News Best Global Universities Rankings, according to both, EDS is purchased by five of the top ten universities in the world. This says a lot about the product when there are so many other vendors who claim to offer something similar. It should be no surprise, because discovery is a greater focus for EBSCO than it is for other vendors. We put our heart and soul into this service, and there is no product line that receives more attention at EBSCO.

So, in summary, we are leveraging Google and Google Scholar and also creating a superior direct-to-library-Web site experience, which provides the best of both worlds to students and faculty.

EBSCO's marketing emphasizes choice. You seem to be saying that you have great products but, hey, we'll work with you no matter what. How do you approach your customers who are not significantly part of your eco-system?

Perhaps the simplest way to look at this is that we believe libraries should be able to evaluate every aspect of their technical services infrastructure and every content component for their collection, and choose what they believe is best. They should not be hindered in their ability to use their preferred products and services because of business decisions by vendors. The reality is that with today's technologies, the integration of resources to form a seamless "best of breed" ecosystem for each library is more than attainable. Imagine you were building a house but had to buy all of your appliances and fixtures from the same company. And just because you wanted a certain stove, you also had to buy that company's refrigerator, television, radio, sink, etc. — even though some of these are not what you prefer, may have serious flaws, and perhaps are not the best priced. Further, if you want the stove, you also must get (and pay for) a wine refrigerator and a trash compactor—neither of which you want or need. And when you tell the vendor you don't want their trash compactor or the wine refrigerator, the vendor tells you that if you remove those, you don't save any money because they come "free" with the package, even though they obviously don't. That practice is essentially occurring today in the library community with discovery services. We don't believe that libraries should be forced to accept an inferior discovery service if they want to buy a "next-gen" ILS. We have been attempting to stop this, and many libraries and consortia are standing up to the ILS vendors to demand that they put a stop to this practice. Recently, the state of Florida dropped an ILS from a vendor pushing an inflexible product bundle including a first-generation discovery component in favor of another ILS that allows choice, interoperability and best of breed. We are seeing this elsewhere as well.

Open source ILS solutions are also gaining momentum, and open source means community, control and choice. EBSCO partners with ILS vendors, content providers, book ordering tools, etc. to create a truly interoperable environment where libraries have true choice. We've shown this through GOBI integrations with ILS/Discovery providers, through our open metadata sharing policy, through the availability of EBSCO e-books in competing ordering services, via journal APIs, integrations with LMSs, ILL services, etc. We've worked with libraries to enable what they believe is best for them—and at the same time, helped them to save money. It's the perfect scenario, so approaching customers is simple. Each library chooses, and we help optimize those choices.

Own e-books or rent them? We know it's the customer's choice but you have the data and more of an insider's view of this publishing space. What should librarians consider and how can EBSCO help us create cost-effective and highly used eBook collections?

EBSCO makes a wide variety of e-book acquisition models available to libraries. We share objective information about these models, so libraries can make informed decisions. How does the universe of available content change from one model to the next? How does pricing vary across and within models? How are these models trending? These are key questions every library should consider when making acquisition decisions. Also of interest to many customers is what other libraries are doing—what combination of acquisition models is working for them? Major EBSCO e-book acquisition model op-

tions include subscription (large collections, all unlimited concurrent users), outright and patron driven purchase (with one, three, and unlimited concurrent user options), patron-driven short-term loan (with 1-, 7-, 14-, and 28-day options), patron-driven loan-to-own (purchase after a predetermined number of short-term loans), and concurrent access (unlimited concurrent users up to an annual maximum). Given significant trending developments over the past year, we see most libraries today using subscription and outright purchase as their core acquisition models, along with a patron-driven purchase component for select backlist titles. Without getting into specifics, we can say most libraries are using patron-driven models and concurrent access models much more selectively now due to increasing prices and reduced content availability associated with these acquisition models. Beyond the models themselves, EBSCO is always working to help libraries optimize the models they choose. For example, libraries with limited concurrent user titles can leverage turn-away alerting to expand access as needed. EBSCO will continue to provide libraries with an array of e-book acquisition model options, while at the same time assuring transparency about each, so libraries can make the best decisions for their institution.

Any chance that EBSCO's eco-system could become more an open platform for developers, and can EBSCO play a much needed role in helping open source technology initiatives in libraries?

This is a great question.

Today, EBSCO Discovery Service (EDS) is extremely customizable, and many library developers have made widgets and other enhancements that have been shared with the worldwide EDS community. We encourage this kind of cooperation.

In addition, we have been contributing to open source technology initiatives and would like to see these enterprises succeed as much as possible. For example, some customers using Koha (an ILS created by librarians for librarians) approached us and asked us if we could sponsor any of seven high priority projects to improve Koha:

- Strategic upgrade of Koha's core full-text search engine technology to ElasticSearch; ensuring long-term viability
- Increased functionality and accuracy of facets
- Development of a browse function (author, title, subject, call number)
- MARC to RDF crosswalk enhancing capability of linking to online data repositories (linked data)
- Greater flexibility in ingesting metadata schemes beyond MARC21
- Improved speed
- Enhanced patron functionality API access

After carefully reviewing the projects, we (EBSCO) decided to fully fund all of them. The development and integration will be implemented by key Koha contributors (ByWater Solutions, Catalyst IT, and Cineca). In keeping with open source tradition, these enhancements to Koha are truly open source and will be available for others to use, modify, and redistribute. The two organizations (EBSCO and Koha) will also be working to ensure full Koha OPAC functionality within EBSCO Discovery Service (EDS) at no additional charge for mutual customers.

Further, EBSCO is investing in Quali OLE and has become a full member. For those who aren't familiar with this enterprise, a number of inspired university libraries partnered together to create community source software (i.e., an ILS) and worked with the Mellon Foundation and others to make it a reality. EBSCO is excited about the long-term potential of this initiative and is trying to help in a number of different ways.

We will be seeing some of you at the upcoming Charleston Conference. Thank you for your support and participation, especially the scholarship for newcomers. Tell us what this support means to EBSCO and how it fits into your mission?

We see the Charleston Conference as one of the most important conferences for academic librarians, and we are very pleased to provide scholarships. This is part of our mission to support both libraries and librarians. We look forward to attending. Many of our customers will be participating in panels, and we are genuinely interested in hearing what they have to say.

About Sam Brooks

Sam Brooks is Executive Vice President of EBSCO Information Services. He is in charge of all worldwide marketing, market research, sales, publisher relations and strategic partnerships. Mr. Brooks is heavily involved in product development and is one of the leading content experts in the company. Sam is a member of the steering committees for all major content and technology initiatives for the company, and is also the chief architect of EBSCO's 21 advisory boards and numerous focus groups.

Sam has visited universities in more than 90 countries, and has worked extensively with ministries of education, science & technology and culture in developing nations to expand access to information.

Mr. Brooks has authored papers in major international library science journals, e.g., *Serials Review* (Elsevier Science), *The Library Quarterly* (University of Chicago Press), *portal: Libraries and the Academy* (Johns Hopkins University Press), *Information Technology & Libraries* (LITA), *Journal of Academic Librarianship* (Elsevier Science), etc. He has also been published in the library publications of more than a dozen countries, including *Hungarian Journal of Library & Information Science*, *KLC Journal* (Kazakhstan), *EBIB* (Poland), *Librarianship* (Russia), *Journal of Educational Media & Library Sciences* (Taiwan), etc. Sam Brooks co-edited the book "Library/Vendor Relationships" (Taylor & Francis), published simultaneously as an issue of the *Journal of Library Administration*.

Sam has participated in panel discussions or appeared as the keynote speaker at many library conferences, including ACRL Chapter Meetings, IFLA, The Charleston Conference, ALCTS Networked Resources & Metadata Committee Meeting, International Congress of Information (Cuba), LITA Technology & Access Committee Meeting, NLA Tri-Round Table, and many others.

Mr. Brooks joined EBSCO in July 1991 and is a member of the EBSCO Founder's Club. ■

Finally, could you give us an idea of EBSCO's mission, as well as what makes EBSCO different or anything you think would surprise our readers about EBSCO?

Let me start with the obvious point that is no surprise. EBSCO is big. In fact, it is one of the 200 largest private companies in the United States. Due to the behavior of some other large library vendors, sometimes when you are "big," there tends to be the assumption that you are the opposite of benevolent. With that said, here are some things your readers probably don't know. We (EBSCO) are not a public company or private equity owned. Instead, we donate a much higher percentage of our profits than is common in society or in our particular industry, and we don't do much to advertise this. The donations go to a wide variety of causes, but are often provided to universities, libraries, and cultural institutions. Further, EBSCO believes strongly in a positive future for academia, and we see ourselves as an important ally in the ongoing battle to provide end users with valuable tools via the library, at prices libraries can actually afford. As the largest

intermediary between libraries and publishers/content providers, EBSCO has used its position to make premium research information and technology affordable. We see this as a responsibility, which we take very seriously. We have incredible stability at the top (for example, our Chairman of the Board has been with the company for nearly 50 years, our President has been with the company for more than 30 years, and I will enjoy my 25th anniversary next year), and this continuity shows in our consistent strategy and follow through. We care about the user experience. We care about the level of service we provide to libraries. We care about the quality of subject indexing. (Side note: We are providing high quality subject indexing for more than 11,000 Open Access journals.) We care about interoperable technology and have established partnerships with nearly all of the world's ILS vendors (and as mentioned earlier, we also support open source technology and are partners of and major contributors to Quali OLE and Koha). We care about libraries. ■