Planning a Different Journals Future: UConn Library's Major Unbundling Project

Acquisitions Institute at Timberline Lodge
May 20, 2024

UCONN
LIBRARY

Presenters

Jane Strudwick
Head of Acquisitions & Discovery
jane.strudwick@uconn.edu

Kristina Edwards
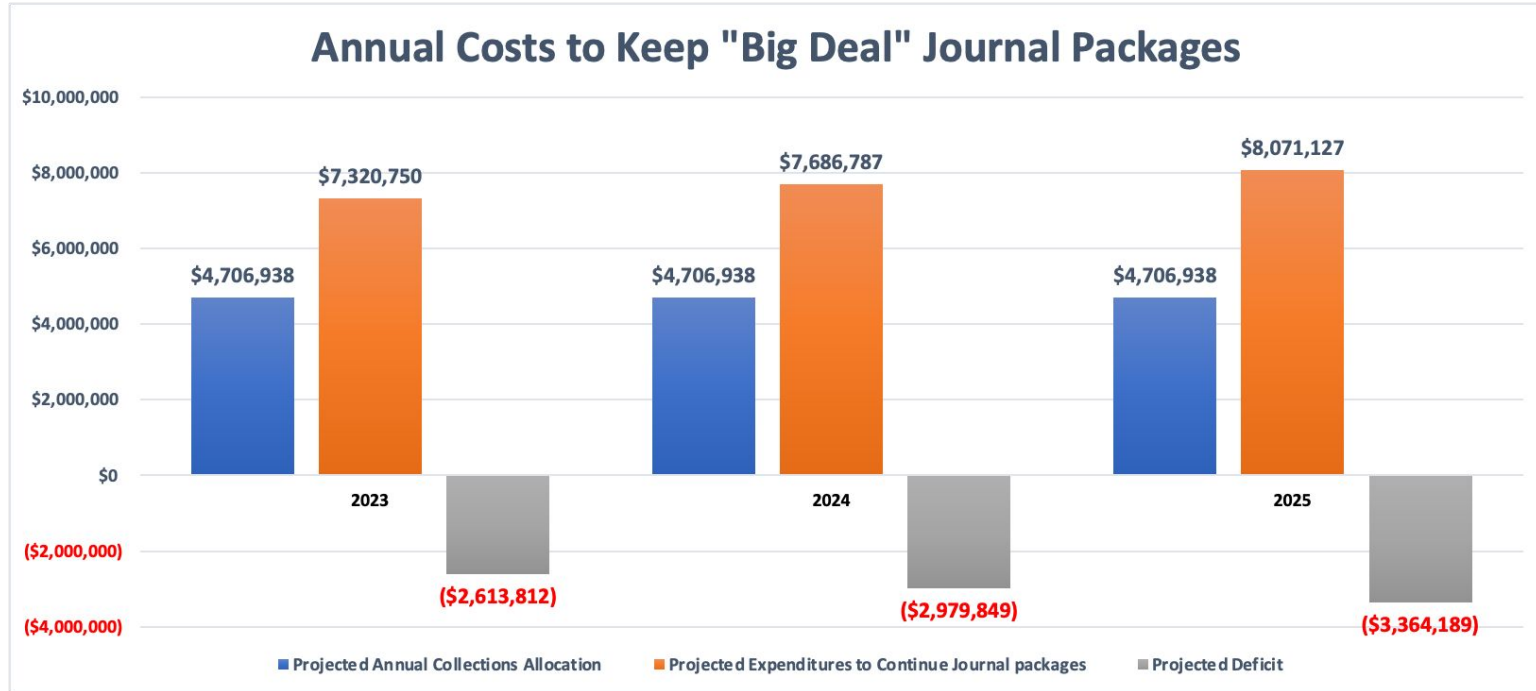Electronic Resources Librarian
kristina.edwards@uconn.edu

Outline

- About Us
- Statement of Problem
- Parameters for Budget Reduction
- Cancellation Planning and Negotiations
- Using Article Galaxy Scholar
- Discovery
- What's Next

About Us

- R1 land grant university founded in 1881
- Homer Babbidge Library, located on main campus, Storrs, Connecticut
- UConn Health Library and UConn Law Library have separate budgets
- 30,000 FTE student population
- 10,609 full-time & part-time faculty
- $4.7M collections budget
- Consortia Memberships: NERL/CRL, BLC, Lyrasis

Statement of Problem

Annual Costs to Keep "Big Deal" Journal Packages

- Projected Annual Collections Allocation
- Projected Expenditures to Continue Journal packages
- Projected Deficit

2023
- $4,706,938
- $7,320,750
- ($2,613,812)

2024
- $4,706,938
- $7,686,787
- ($2,979,849)

2025
- $4,706,938
- $8,071,127
- ($3,364,189)

Vision for Collections

Collections at UConn Library: Responsive. Relevant. Sustainable.

The UConn Library is committed to supporting the academic and scholarly success of our community. As stewards of the world of information, our goal is to strike a balance between providing relevant resources to meet the increasingly diverse research and teaching needs at UConn while staying within our budget.

See full statement https://lib.uconn.edu/research/collections/future-of-journals/

Library Dean's Parameters for Budget Reduction

- All communications will come from the Provost's Office
- All journals are up for cancellation
- Creation of Future of Journals Committee (FoJ): faculty committee that would champion the Library's efforts.
- Creation of the Article Delivery & Access Group: library staff working group to investigate seamless access to articles
- We will not engage in a title-by-title review.
- Library research databases/indexes and books budget will be retained.

Future of Journals Committee (FoJ)

- Led by the Provost and Library Dean
- Membership included representation from all disciplines
- The group met monthly for two years
- A combination of the Library educating the group on journal pricing, licensing, and access, and listening to faculty concerns
- The Assistant University Librarian of Collections and Discovery was a member of the FoJ and the Budget Reduction Group
- An additional library group met monthly with the Dean and Head of Communications to plan an outreach strategy.

Targeting the Big Deals

- Review licensing periods for all big journal packages to determine which were up for negotiation
- When possible, alternate between discipline emphasis and perpetual access v. core access packages.
- Target big deal packages
    - Springer/Nature, Cambridge, University of Chicago
    - Oxford, Elsevier
    - Taylor & Francis, Wiley
    - Sage

Five Year Plan

- Reduce journal spend by $2.5 - $3M, Fiscal years - 2021-2025
- Reduction plan.

  - FY 2021 -$500K

  - FY 2022 -$1 M - Per Provost suspended cancellations

  - FY 2023 -$1 M – UConn Health funded majority of OUP package

  - FY 2024 - $500K

  - FY 2025 -

- Endeavor to space out big package cancellations by subject areas

Review Process - UnSub

- Unsub is a data dashboard that predicts the impact of "unbundling" package deals by comparing package cost- effectiveness to customized title-by-title collections

- The Library strategically subscribed to high-value titles using the Unsub data analysis service

- Unsub will also be used to add needed subscriptions to build a responsive collection

Budget Reduction Group

- Membership: Associate University Librarian for Collections & Discovery, Head of Acquisitions & Discovery, Electronic Resources Librarian, Collection Strategist, UConn Health Collections Librarian, UConn Law Head of Acquisitions, Public Services representation.
- Discuss negotiating, licensing, and title lists. Created a smaller negotiating team to lead vendor meetings.
- Create plans that will accommodate the loss of current full-text journals across subject areas and within current licensing terms.
- Collate and analyze usage data
- Communicate plans to library staff

Negotiating

- Created title lists using unsub within a target price – as negotiated with Health
- Needed to inform both vendors and consortium of intention to break the big deal
- Negotiated on historical pricing
- Leveraged one-time purchases for reduction in pricing
- Did not enter into multi-year licenses

Article Delivery & Access Group

- Included library staff from public services, technical services, interlibrary loan, collections, and marketing & communications
- Explored current processes for article delivery (interlibrary loan), journal access, and authentication
- Selected Article Galaxy Scholar to complement ILL for article delivery
- Facilitated work between UITS and Reprints to implement SSO
- Implemented interim solution: Article Gateway

  - a "bridge solution" using ILL workflows while Reprints worked on SSO

UConn Configuration

- All users are directed to Open Access as a first option when available
- Undergraduate students, etc., are directed to ILLiad
- Faculty, graduate students, and library staff are directed to AGS for immediate article delivery
- All cancelled journals from packages to be available for AGS delivery to faculty and graduate students without any purchase thresholds
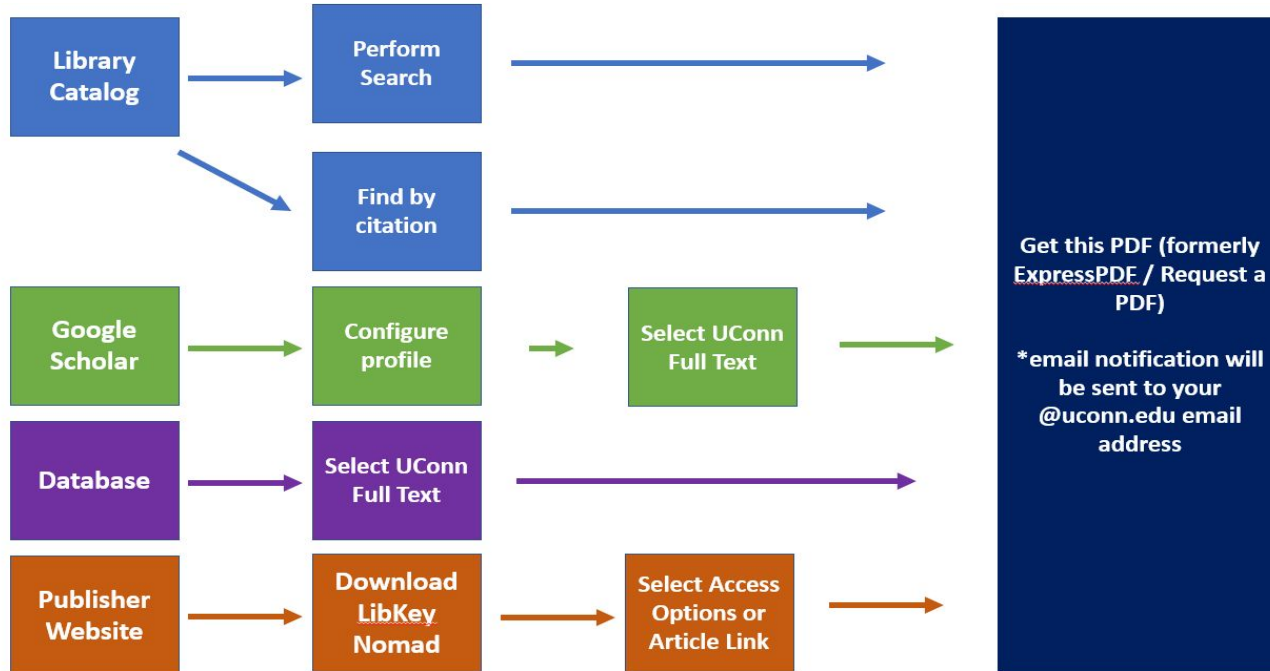
Setting Up AGS: Authentication (now SSO)

- At UConn's go-live in 2021, Reprints did not offer Single Sign On (SSO) for AGS, and we were using EzProxy as part of authentication
- Initially, faculty and grad student email addresses were extracted from Alma and loaded into AGS; authentication happened inside AGS when the user entered their delivery e-mail address
- UConn worked with Reprints to develop/implement SSO (and we moved ILLiad to SSO as well, which allowed us to drop EzProxy) and now UConn's AGS uses SSO exclusively for authentication and user group access control

Moving to our new normal....

- Each year for this project, we have taken a moment to see if there are new access pain points
- Created a LibGuide called "Request Full Text" to complement our Future of Journals communications (updated each year)
- Fully implemented additional tools to help bridge any access gaps: Article Galaxy Scholar (AGS), Unpaywall, LibKey Nomad
- Instruction has been updated to include new tools and help users navigate in our new environment
- Responses to journal cancellations are framed to educate users how to get to full text rather than focus on the cancellation of a particular journal subscription

Requesting Full Text

Library Catalog	→	Perform Search	→	
	↘	Find by citation	→	
Google Scholar	→	Configure profile	→ Select UConn Full Text →	**Get this PDF (formerly ExpressPDF / Request a PDF)**
Database	→	Select UConn Full Text	→	*email notification will be sent to your @uconn.edu email address
Publisher Website	→	Download LibKey Nomad	→ Select Access Options or Article Link →	

Lessons Learned

- Be clear with all stakeholders about evaluation process for what subscriptions are retained (analytics or title by title)
- It is important to be clear with users about delivery times; AGS is faster than ILL but ILL is typically fast
- It's important when switching from using EzProxy to SSO that you have everyone in the same room (or Teams call)
- Communicate with library colleagues regularly and have them help with testing

What's next....

- How to review AGS and other usage statistics to make decisions
- New Dashboard for article level analysis
- How do we incorporate APC/OA considerations
- How do we staff and change workflows and workloads to accommodate new processes
- Overall assessment of program

Thank you for your attention!

Questions?