



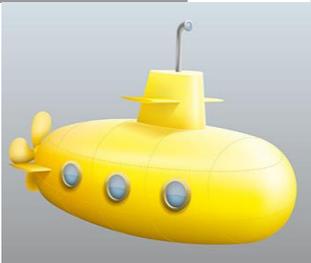
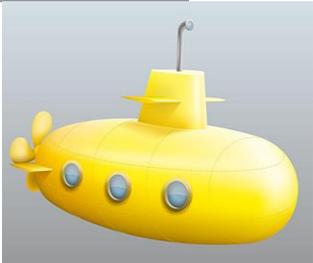
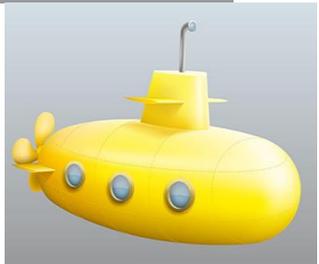
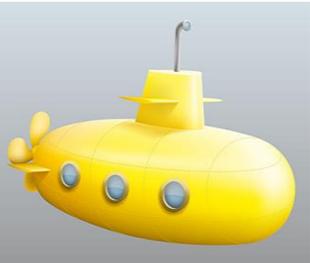
UNIVERSITY OF  
CALGARY

# Coping With the Big Deal: Paying, Unbundling, or Walking Away

Robert Tiessen, John Wright  
April 12, 2018

- Heather D'Amour
- Robert Tiessen
- Andrew Waller
- John Wright
  
- Other Content Development Team members: Betty Luong, Andrew Forte, Linda Ryan.

- Standard Narrative to Unbundling
- Deeper Narrative about Changes in Academe
- New Approach Taken
- Results:
  - Better connexion of Content Development to faculty and research support
  - Sounder statistics
  - Clearer, evidence-based, communication



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# Canadian dollar on track for 2nd-worst year ever

Currency is down 17% year-to-date against the U.S. currency

CBC News | Posted: Dec 18, 2015 4:51 PM ET | Last Updated: Dec 19, 2015 6:53 PM ET



The Canadian dollar hasn't been at par with the U.S. dollar for three years. This year, the loonie's slide against the American dollar was one of the biggest ever. (Mark Blinch/Reuters)

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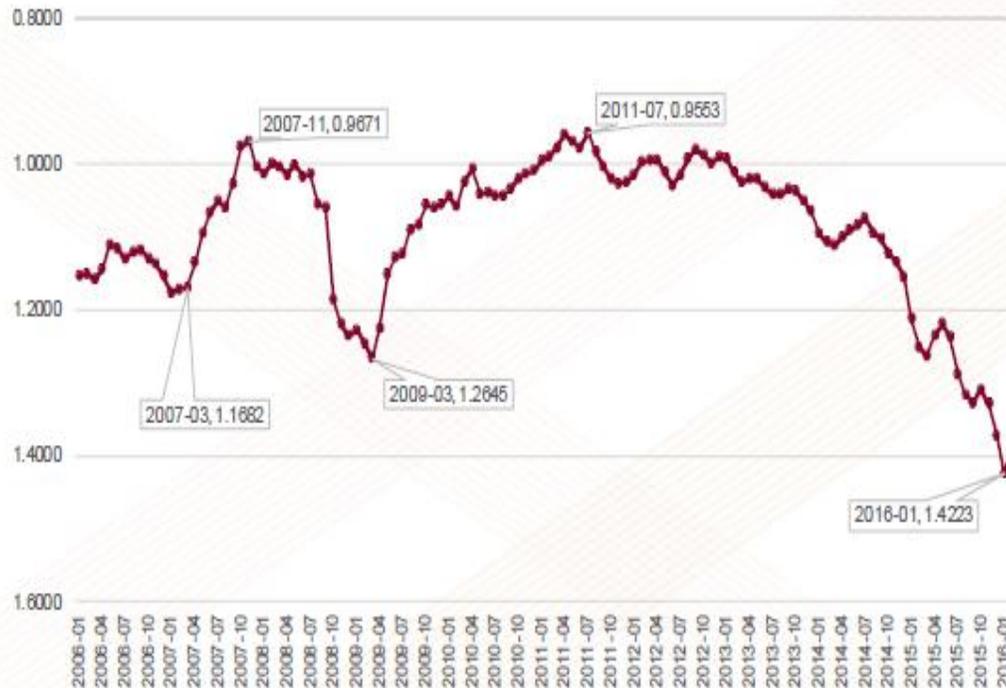
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## Larger Context: Weak Canadian Dollar

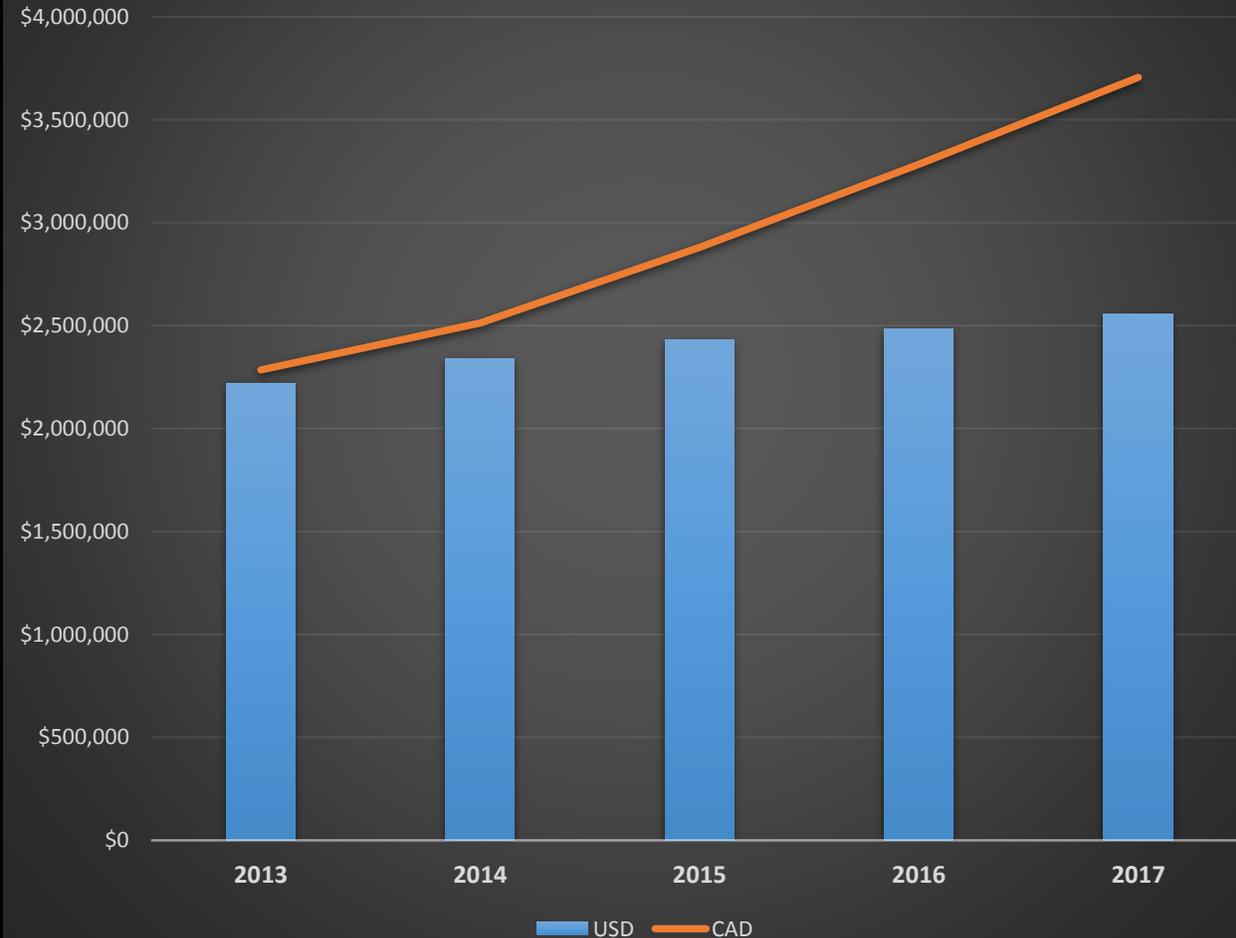
10-Year average monthly price history of the value of the CAD vs the USD (inverted scale)  
Source : Bank of Canada



3

## CKRN USD Package Contracts vs. CAD Paid Amount by Year

(includes: ScienceDirect; Wiley; Taylor & Francis [incl. Informa Healthcare]; Springer and Sage)



- Gather best evidence immediately available
- Develop explanatory power
- Create Communications Package for Senior Administration that includes the larger narrative
- Get Library Administration Buy-in and then campus-wide buy-in

- Two Key data points immediately available: Cost & Useage
- Reviewed packages for subject/discipline balance
  - Required additional coding and normalization to relevant subjects
  - Coded subjects to faculty impact
- Reviewed key faculties by journal for some
  - Highlighted packages outside big deal that had overlap – e.g. Hein
- Reviewed cost of replacements of top used journals outside of package

## The rising price of knowledge: University of Calgary cuts 1,600 academic resources



By **Scott Strasser**, January 16 2017 —

In the world of academia, knowledge is a commodity with rising costs — that much is evident within the University of Calgary's libraries collections.

This year, the U of C's libraries and cultural resources department has cancelled academic journal subscriptions valued at \$1.5 million. The cancellations include roughly 1,600 academic resources, including 887 journals from prominent Taylor & Francis bundles.

The reveal of the cancelled subscriptions — several hundred of which went into effect on Jan. 1 — sparked anger from some U of C faculty members.



*U of C geography professor Byron Miller spoke out about the cancellations // Photo by Justin Quaintance*





## 2011->2015

- Big Deals predicated on 30 year understanding of value = cost/use
- Changes in University Academic Plan and Priorities
- Shift to the Taylor Family \*Digital\* Library
- Changes in Publishing

Pre-existing change in thinking about Content Development

- The 2015 Cancellations crystallized our understandings that the Big Deal calculations were less relevant for our collection
- Needed responsiveness and agility
- Needed to follow a changing, fluid, academe
- Flexibility and timeliness was being prioritized more than cost

- **Assess Gaps in Knowledge**
  - COUNTER Issues
  - Address types of use
  - Acquire better analytical tools
  - Implement and assess discovery and delivery models
  
- **Review Licensing Issues**
  - Opt-outs
  - Perpetual Access acquired during contract lifetime
  
- **Improve and Enrich Communications**
  - Richer detail for external communications to address anecdotal evidence
  - Improve direct access to analysis and tools for subject librarians

- Libraries send their holdings & Counter Data to 1Science & an extensive spreadsheet comes back
- We relied most heavily on *Synthetic Usage (SU)*
  - Published articles over 7 years by UCalgary faculty...
  - Journals cited by UCalgary faculty...
  - Downloads over a 1 year period

- Renewal Offer came on 22 November 2016
- Decision date: 16 December 2016
  - Either the Big Deal;
  - Or one or more of 3 large Subject Collections;
    - Social Sciences & Humanities
    - Science & Technology
    - Medicine
  - Or choosing from 25 smaller subject packages

# The 70% Solution: What if we opted out?

<b>91 Titles Purchased at List Price</b>	<b>2098 Titles Not Purchased</b>
<b>Total Downloads – 1,968</b>	<b>Total Downloads - 5045</b>
<b>Total References Cited – 3,379</b>	<b>Total References Cited – 3,607</b>
<b>Total Papers Accepted - 587</b>	<b>Total Papers Accepted - 418</b>
<b>Average Synthetic Use – 1,468</b>	<b>Average Synthetic Use - 100</b>

- Core Content – Perpetual Rights
  - 458 journals

<b>Package</b>	<b>Top 100 Journals</b>
<b>Medical Library</b>	<b>31 Journals</b>
<b>Science &amp; Technology Library</b>	<b>35</b>
<b>Arts &amp; Humanities</b>	<b>4</b>
<b>Mental Health &amp; Social Care</b>	<b>5</b>
<b>Psychology</b>	<b>14</b>
<b>Sport, Leisure &amp; Tourism</b>	<b>4</b>

We excluded 10 Subject Packages from the Social Sciences & Humanities Library that had 7 top 100 Journals.

In January/February, we ended up subscribing to two of the SSH Subject Packages:

- Education
- Geography, Planning, Urban & Environment.

- Vice Provost (Tom Hickerson) supported by Communication Officer, Associate University Librarian & Director, Content Development (regular briefings, data/information preparation), Content Development Team (librarians and staff)
- Consistency of message
  - Identified topics that were part of current media conversation and discussion amongst senior administration
    - Focused on growing monopoly & price increases among publishers (big 5), devaluation of the Canadian dollar, Library Budget, Scholarly Communication, Open Access Publishing and UofC Open Access authors fund
  - Surveyed communications from Canadian Academic Institutions (news and websites)
  - Used talking points consistently to get the message out and broaden knowledge of issues amongst university community
    - 1 ¢ drop or gain results \$100,000 change in buying power
    - 23% drop in value of Canadian \$
    - 85% of budget tied to \$ US
    - Can't "buy our way out" of ever increasing prices
    - Provide the evidence regarding budget expenditures and use of content by the community
    - Give credit ( i.e. soft funding support)
- Prepared the data, and evidence

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