

From Big Deals to Small Packages: Paying, Unbundling, or Walking Away

University of Calgary Content Development
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- Standard narrative to unbundling
- Informed by longer term changes in academe
- New approach taken: 1Science plus
- Outcomes

- In 2015 a convergence of:
 - Rapid fall of the Canadian Dollar
 - Continual, compounded, year-on-year rise of journal prices
 - Growing inflexibility of budget: tied-costs
 - Multiple years of zero budget increase
- We had to shed ‘big deal’ consortium package as the only way to achieve savings
- “Lesson”: We had to accept we were in an age of diminishment

- 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

- Had limited data: cost, use, broad ‘impact’, overlap
- Required a large amount of customized work
- Was one time
- Were able to make a reasonable decision on the data we had...but
- Realized none of this was addressing our long term collection development issues

Things Don't Change, We Change ~ Henry Thoreau

- 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

- Represents pre-existing trends in thinking about Content Development from 2011 to 2015

- 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

- 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 and extent of holdings

- 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?

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

- Core Content – Perpetual Rights
 - 458 journals

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

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.

- Now developed into an effective, extended, cross-unit content development 'team' that includes the liaisons
 - The tools developed to unbundle integrated into all content decision making on e-resources
 - Shared in an identified cross-unit drive
 - Two way flow of communications via the spreadsheets
 - Solid quantitative and qualitative understanding of where faculty and research requirements were
 - Ability to negotiate more focused, flexible packages and licensing
- Transformative
 - More than a communications package – a workflow tool

- Richer Evidence- based external communications packages that enhanced traditional messaging of cost
 - No longer a message of diminishment, but of availability and support
- Library able to better reflect departmental activities in its reporting
- Better and more structured discussion between liaisons and departments

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