Breaking up with Elsevier
Providing alternative access

Jeffrey MacKie-Mason, @jmmason
University Librarian
Professor of Information, Professor of Economics
UC Berkeley

SANLIC
26 June 2019
Alt access is critical negotiation leverage

Transformative agreements push publishers out of their comfort zone

Both sides can benefit, but... at some point you may want more than they are willing to give

Your bargaining power depends first and foremost on your willingness to walk away
As libraries, usually we focus on immediate service priority: quick easy access to as much scholarly content as possible.

Canceling a big deal hurts our patrons.

It serves the longer term objective: quick, easy access to *all* scholarly content...and perhaps also at lower total cost.

Aggressive, transformative negotiations are raising priority on long-term gain – want to minimize short-term cost to patrons.
Developing UC’s alt access strategy

- Assess current capacity, practices
- Plan ahead for cutoff
- Communicate
- Assess and improve post-cutoff experience
UC Toolkit recommendations

Alternative access
Patrons are used to home base plus 1-click simplicity – don’t provide them with long, complicated lists of alternatives.

There may be at least 20 different significant open access archives, plus nearly every major institution: PubMedCentral, arXiv, BioarXiv, etc.

We boiled it down to 3 key options:
  • Find open access copy (2 ways)
  • Ask the author
  • Ask the library
Raise awareness of library’s interlibrary loan service

Used only by small subset of our patrons, since direct access to Big Deal publications has been ubiquitous

We have programmed our link resolver to present different information for unavailable Elsevier articles, emphasizing ILL request form

Communicate about turnaround time to reassure
 Toolkit recommendations

Consider strategies to expedite

Be prepared for direct purchase of articles (“document delivery”) for speedy service when requests are urgent

Savings on canceled contract can be used for this purpose

Also consider subscribing to accelerated ILL services if available, like RapidILL
Employ usage data from own and other institutions to estimate demands for library-assisted article access
- If you have perpetual access rights to historical articles, focus just on demand in a year for its current year, to estimate year 1 impact

- NB library demand: several institutions reporting that demand to Library is only about 5-10% of COUNTER usage
  - Overcounting by COUNTER, and people finding copies elsewhere

- Also measure and assess: turnaround time on library assistance requests

In our consortium of 10 campuses, we are piloting a few different strategies to test responsiveness and cost
We created our alt access web page and published it well before end of contract to reassure faculty.

We always discussed alternative access during outreach (town hall meetings, email communications, media stories).

We planned and coordinated communications to continually remind patrons that it was a faculty / library / administration coalition leading these actions.
# June 26 plan

<table>
<thead>
<tr>
<th>Timing</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>June 26, 9am</td>
<td>Campus communicators <a href="#">alert campus news services</a>, if appropriate</td>
</tr>
<tr>
<td>9:10am</td>
<td><a href="#">Academic Senate letter</a> posted online</td>
</tr>
<tr>
<td>9:15am</td>
<td><a href="#">Update OSC website</a> with brief statement in box on UC/Elsevier and Alternative Access pages</td>
</tr>
<tr>
<td></td>
<td><strong>Campuses distribute announcement</strong> through locally appropriate channels (e.g., website, email)</td>
</tr>
<tr>
<td>10am</td>
<td><a href="#">Update appropriate members of the media</a></td>
</tr>
<tr>
<td>after 10am</td>
<td>Campuses <a href="#">update campus newspapers</a>, as appropriate</td>
</tr>
<tr>
<td></td>
<td>Campuses share info on social media, if desired</td>
</tr>
</tbody>
</table>
Commit to ongoing assessment and planning
Negotiating with scholarly journal publishers
A toolkit from the University of California

A North American framework for creating transformative change in the scholarly publishing industry based on initial insights from the University of California’s 2018-19 negotiations with Elsevier

Prepared by the UC Publisher Strategy and Negotiation Task Force
Mar 2019
The tipping point is near!