

Shared Content Leadership Group

Meeting Minutes, July 8, 2016

Attendees present: Martha Hruska (SD, chair), Jean McKenzie (B), Myra Appel (D), John Renaud (I), Sharon Farb (LA), Jim Dooley (M), Allison Scott (R), Julia Kochi (SF), Eunice Schroeder (SB), Becky Imamoto (LAUC), Ivy Anderson (CDL)

Absent: Kerry Scott (SC)

Guests: Chan Li, Jackie Wilson, Mihoko Hosoi (CDL staff)

Announcements

UCB: Jo Anne Newyear-Ramirez will assume position of AUL for Scholarly Resources in August. Jean will continue working with SCLG through the transition.

STAR Team: the STAR Team is slated to review Reveal Digital's business plan model. Review will be initiated for Independent Voices and extend to the new business model, anticipated to debut in the near future. STAR will begin to assess Independent Voices, along with the model for the three new resources. CDL members confirmed that SCP is, and will continue, cataloging Independent Voices. The STAR Team assessment will come to SCLG for review to determine how Reveal Digital fits with systemwide strategic investment discussions. **ACTION:** Jackie will send information request form and web site design proposal to SCLG members to elicit ideas about how to increase visibility throughout UC. Web site will include a roster of Star Team members. **CDL:** Mat Willmott has assumed the position of CDL Open Access Collection Strategist with responsibility to coordinate activities of the license group and manage information and data. Mat will join the STAR Team. **ACTION:** Ivy will share the scope of the Open Access Collection Strategist position with SCLG members. **ACTION:** Jackie will add Mat Willmott's name to the Star Team roster located on the wiki page.

Housekeeping

Workplan review:

- Martha reorganized the Workplan to facilitate tracking and managing priorities.
- Sharon requested that Web Archiving be added to the Collection Development Area of Focus to encourage future discussions about how to make web content useable for patrons and to facilitate sharing campus activities, plans and views about web archiving plans.
- SCLG supports Ivy's recommendation to add to the Collection Assessment Area of Focus a FY18/19 evaluation of the two print copy acquisition policy in the Cambridge ebook plan.

- To further discussion about activities under Collection Management Area of Focus, SCLG will invite Cathy Martyniak and Erik Mitchell to periodically give an overview and update of their assessment and information gathering about the RLFs.
- UCLA is currently exploring off site storage options for low use materials to ease the pressures on the crowded SRLF facilities.
- CoUL plans & priorities: Martha forwarded the SCLG comments (from April) to MacKenzie, CoUL chair.
- Shared Print Team: DOC has approved the revised Shared Print Strategies charge. The charge is undergoing a few minor revisions. John will keep SCLG informed and will share charge with SCLG once the revisions are complete.
- Collection vision discussion - scheduled for September
- Collection Management: ROI/collaborative collection analysis tools - OCLC GreenGlass. Myra will update SCLG if Davis opts to engage with GreenGlass.

July Agenda topics (7/22): Digitization & Google scanning, Revamping title transfer process (CDL)

June 17 notes: ACTION: any revisions due by the end of July 8th

Scholarly Communications Strategies / Pay It Forward

Pay-It-Forward update: Ivy gave an overview of the qualitative and quantitative vectors used in the study, the goals of the project, including developing a sustainable cost model, and what was learned from the study.

- Author analysis: Authors value what they perceive as quality journals and their target audience or community that the journals reach. They are reluctant to publish outside their canonical journals. OA is of much less importance to them. They are price sensitive about participating in OA when they are required to pay. Their willingness to pay correlates with their perception of journal quality.
- Financial analysis: With the variety of business models in practice a financial analysis was challenging. The \$1000 - \$2000 cost is the most sustainable; APC correlated with publication output \$1800 - \$2000. Publisher models for APC charges vary. The PIF study includes a regression analysis to project participant costs. The final analysis, page 107 of the report, shows models of costs among stakeholders of different sizes, e.g. Harvard (large) - Davis (medium) - small UC. Page 120 includes tables showing this data. Each partner will receive data sheets specific to the institution. Study found that while APC is not affordable for large institutions if they must bear the whole cost, smaller institutions would benefit.
- Next step - where to go from here? Sustainability for UC is possible under a couple of different models, but there is no consensus that a systemwide approach is desirable since it would require redistribution of funding among campuses.

- Ivy exploring a potential pilot with UNESCO to determine the impact on developing world.
- Distribution of the PIF report: it's unknown if CoUL has received the report. PIF partners will discuss how and where to distribute and publicize the report.
- SCLG to hold future discussions about libraries funding/supporting APCs vs. the subscription side, individual campus programs or initiatives to fund locally, models where offsetting occurs outside library expenditures and terms added to new license agreements.
- SCLG members agreed that a subgroup be created to generate ideas for discussion and what is potentially viable as a possible pilot.

ACTION: Ivy will draft an overview of the investigation and present to SCLG before the July 22 SCLG meeting.

Licensing Updates

- Taylor & Francis (T&F) Journals, 2016-2018 – The draft license is ready. We are accepting all the transfer-in titles. This is one of the SCP top cataloging priorities, and we will catalog and distribute records as soon as possible.
- American Chemical Society, 2016-2020 – The license is almost complete. The vendor accepted our edits on the Text & Data-Mining Rider, and agreed to keep California State University on the license. We are making some final edits on the attachments (fee tables and site locations).
- Cambridge University Press eBooks – The vendor is still reviewing the draft license. We are sending a reminder to the vendor on a weekly basis. Shared print arrangement has been confirmed with Irvine and Berkeley (i.e. two locations where shared copies will be sent); paperback copies will be sent via their YBP approval plans. Pre-cataloging process has started (427 records identified in OCLC, thanks to Donal O’Sullivan’s effort.) This is one of the SCP top cataloging priorities, and we will catalog and distribute records as soon as possible.
- Nature – We are still waiting for revised amendments (one for archive, and another for current content) with updated terms for 2014-2016, and are sending reminders to the vendor on a weekly basis. The amendment for the new content includes three new Nature titles, and we are trying to finalize quickly given popularity of those titles. The vendor agreed to keep Lawrence Livermore National Laboratory (LLNL) on the amendments because it was on the original licenses, but is insisting on using a consortial license format.

CDL Journal Weighted Value Algorithm Assessment and Revisions Report

- Jackie and Chan Li reviewed the Power Point slides and described the background to the project, including the consultations and steps they took to create new algorithms for assessing value and recalibrating investments. They noted that they also consulted with

faculty and external experts in statistics to review methodologies and gain input from various perspectives.

- New algorithm overview included holistic process, composite metrics with multiple factors, weighted calculations, subject based analysis and comparative approach.
- Three use cases: 1) Developing negotiation objectives for specific publishers; 2) Evaluating journals for potential cancellation/substitution projects; and 3) Developing better value based prices for publisher packages.
- SCLG members agreed not to share the PowerPoint slides at this time since Jackie and Chan Li will revise and provide more detail in preparation for the webinars.
- Actions/Next steps: 1) Update CDL journals database with variables; database is internal and will be made accessible once analysis is complete; 2) SCLG supported Ivy's suggestion that CDL conduct a webinar, offered once in Summer 2016 and again in Fall Quarter, 2016, to discuss with UC librarians the report and new assessment algorithms and to address questions.

Budget Round Robin

Campuses will post budget updates to the SCLG wiki.