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Unbundling the “Big Deal”: One Library’s Experience in Rising to the Occasion

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Background

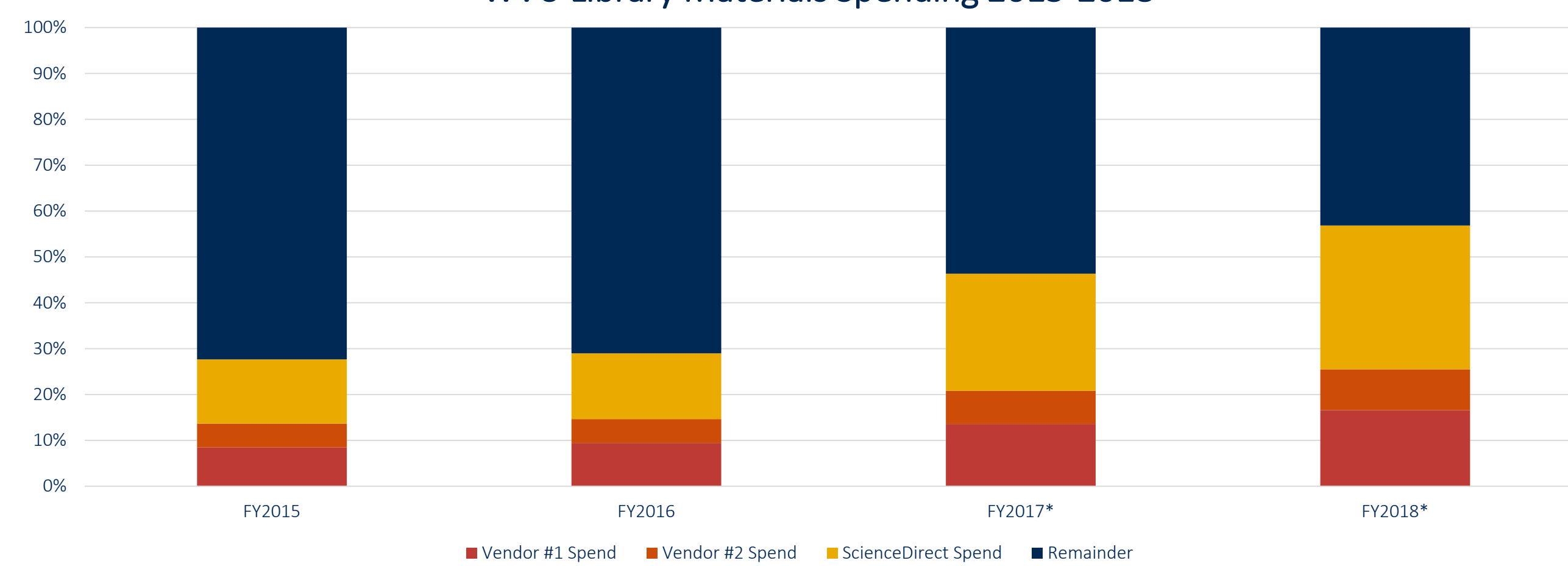
Budgetary constraints at West Virginia University (WVU) in combination with the impending expiration/renewal of “big deal” contracts forced the WVU Collections Advisory Committee (CAC) to implement the unbundling of three major journal packages. Wiley was the first package unbundled in 2017, followed by Elsevier Science Direct and Springer packages in 2018-19.

Science1 Report Showing WVU Research Output

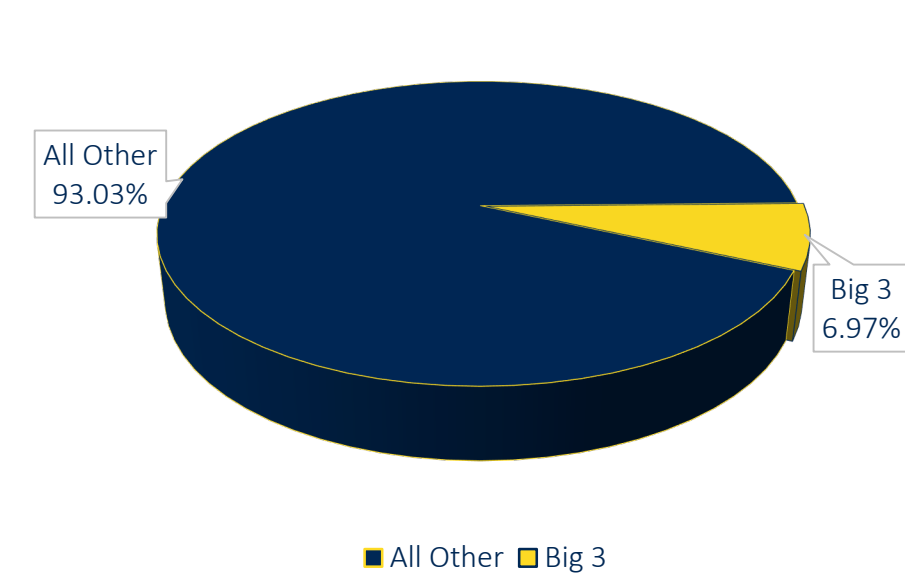


Factors in Walking Away

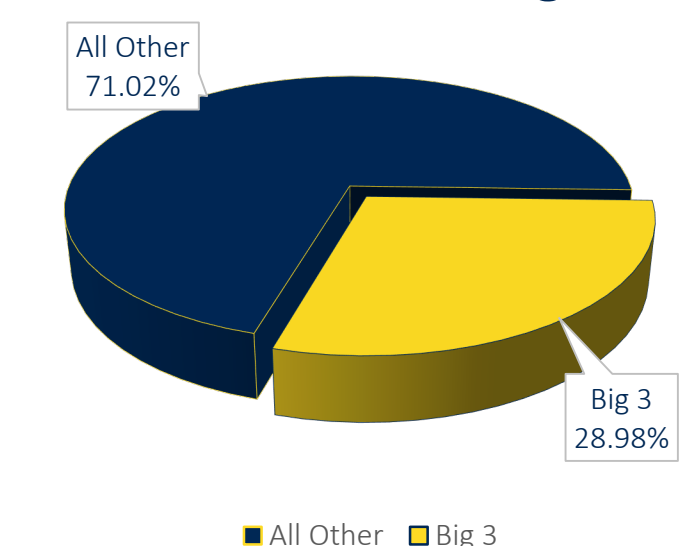
WVU Library Materials Spending 2015-2018



WVU Libraries eJournals



WVU Materials Spending Pre-Unbundling



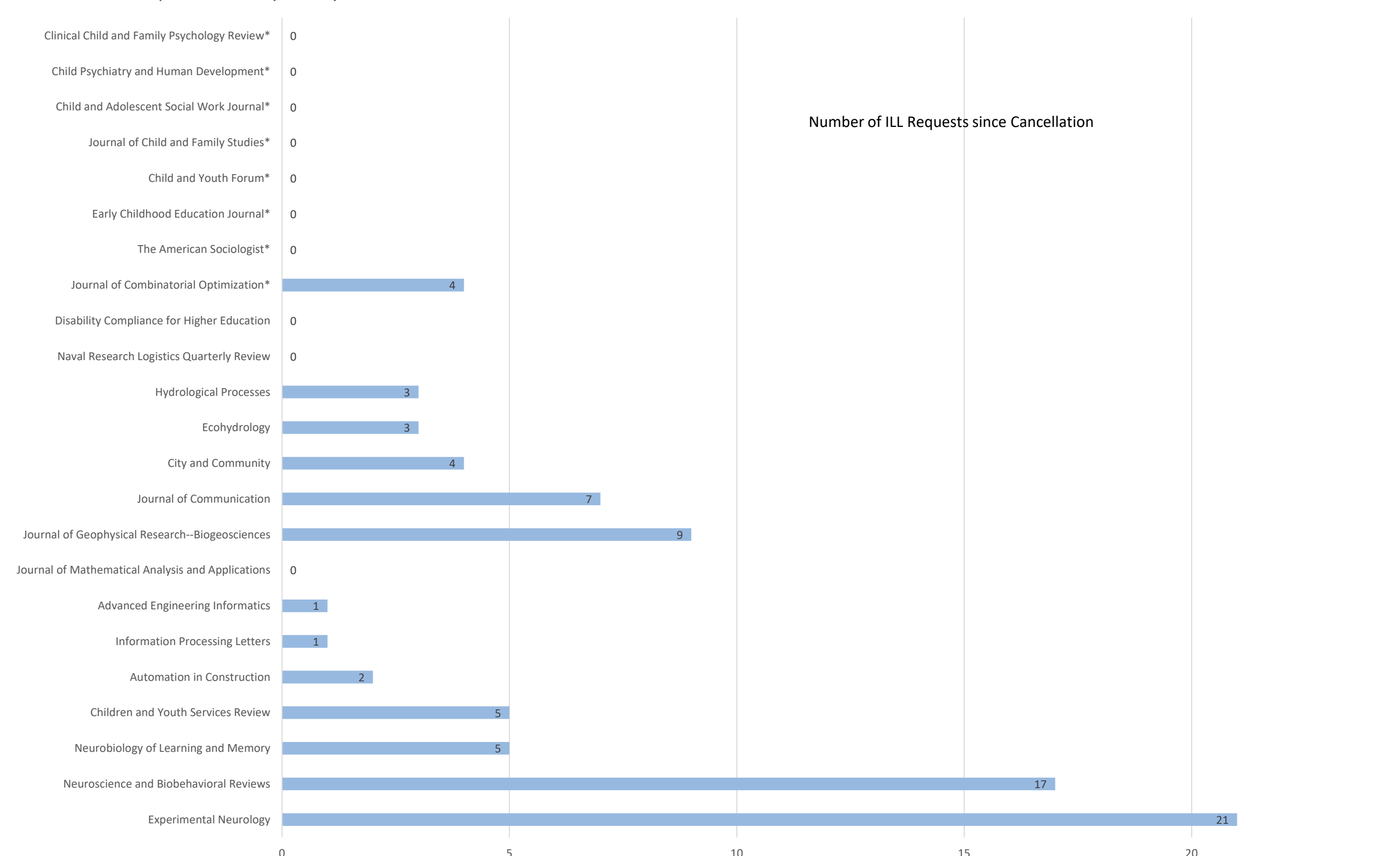
Methods

- For the period 2013-2016, the CAC determined for each journal title:
 - ✓ Total uses, including Year of Publication (YOP) use
 - ✓ Cost per average use
 - ✓ Number of papers published by WVU faculty
 - ✓ Number of references/citations used from each title by WVU faculty
- Overlap analysis was used to eliminate titles
- Journals were ranked for each of the criteria, then a rank average was assigned to each title
- Rolling sum was used to reach cutoff point based on what the institution could afford
- Librarians had the opportunity to “plead the case” for certain titles
- WVU’s Clinical Key contract had a major impact on which journals were kept from the Science Direct package

Results

- Springer: retained 79 titles and lost access to 2,143 titles
- Wiley: retained 113 titles and lost access to 1,275 titles
- Science Direct: retained 247 titles plus 294 Clinical Key titles and lost access to 196 subscribed and 1,216 Freedom Collection titles
- Usage statistics for Clinical Key journals have quadrupled since the unbundling, going from an average of 505/month in 2018 to an average of 2,192/month this year
- An expected increase in interlibrary loan requests for canceled journals has not materialized, making ILL costs much more cost-efficient than the former subscription costs
- Librarians have received few complaints about canceled titles

Lost Titles Requested Back by Faculty



Number of ILL Requests since Cancellation

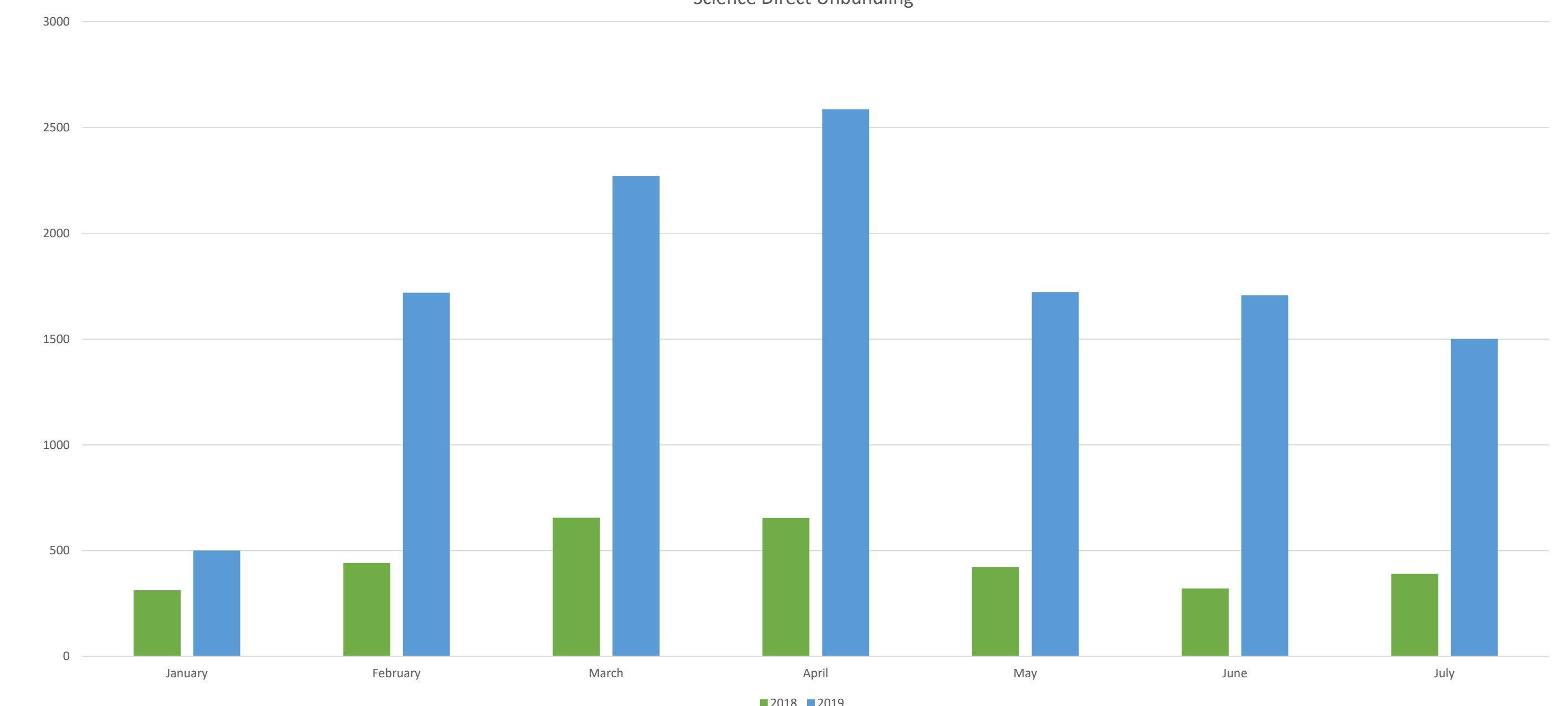
Interlibrary Loan Requests for “The Big 3” (July 2018-August 2019)

	Science Direct	Springer	Wiley
# of Requests	3,603	180	310
# of Articles Paid For	198	1	27
Total Cost	\$4,400.70	\$39.95	\$853.90
Cost Per Article	\$22.23	\$39.95	\$31.63

Savings Achieved

	Science Direct	Springer	Wiley
	\$800,000	\$200,000	\$441,450

Clinical Key Journal Usage Before/After Science Direct Unbundling



Keys to Our Success

Research – The team began the process with a literature search to develop an awareness of the current climate in publishing negotiations. Key articles and news reports provided insightful information and a best practice methodology to begin our adventure (See references below).

A Diverse Team – Pulling together a group from multiple libraries with various backgrounds and liaison areas created a solid group equipped to think globally and fulfill the “One WVU” mission.

Stakeholder Education – Educating our stakeholders on the need for unbundling, publisher tactics, and our commitment to helping them accomplish their research goals was integral to maintaining a good rapport and creating feelings of solidarity with our stakeholders.

The Criteria – Creating a well-constructed selection criteria simplified the title review process. Being careful to apply the selection criteria to the title list enabled the team to avoid contentious arguments. However, a rule established from the beginning was that any member could make a “case” for any journal that did not meet criteria but was crucial to researchers in their areas.

Commitment – Perseverance when discussions were challenging helped to maintain team unity. Each team member was committed to retaining an open-mind and pledged to remain unbiased and respectful. This commitment was key to creating and keeping a cohesive team eager to engage for the common good of the entire library system.

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