



The CHARLESTON REPORT

Business Insights into the Library Market

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Charleston Conference Goes Virtual for 2020

After 39 years, the Charleston Conference regrets to announce we are unable to meet in person as planned this year. We sent a survey to conference attendees from the past five years, and received a huge return rate of over 900 librarians, publishers, vendors and more. The overwhelming response was that although attendees love and value the conference, they're simply not able to come this year. We all know **budgets have taken an enormous hit this year** as colleges and universities struggle to determine how to re-open in the fall, and publishers and vendors are therefore also feeling the crunch. Beyond those budgetary constraints, however, **there is real and valid concern over travel safety** as the majority of our attendees are coming from out of state, or even internationally, to attend. Even with following all of the recommended social distancing, protective policies, and disinfecting protocols, the travel to the venue and the hotel stays are problematic for attendee safety. For all of these reasons, we agree that it is the **best to move to an online-only conference**.

We are committing ourselves to providing a top-notch, interactive, and immersive online experience for our attendees. We want to do our best to bring what you know and love about Charleston to you remotely! The event platform we're using will provide a **virtual vendor showcase, networking opportunities, and a user-friendly interface for conference sessions**. We're working on schedule details now but plan to bring a mix of our usual high quality keynote and plenary speakers along with concurrents and some fun social options.

We're sad that we can't be with you in person for 2020, but we look forward to hopefully going back to an on-site event for 2021. Contact Leah Hinds, Executive Director, with questions at <leah@charlestonlibraryconference.com>.

TCR Reports from the Field: Hot Topics at NASIG's 35th Annual / 1st Virtual Conference, June 9-11, 2020

... Reported by Rebecca Tatterson, Electronic Resources Librarian, East Carolina University, <tattersonr17@ecu.edu>

The 35th NASIG annual conference was held online this year as a result of the COVID-19 pandemic. As many of us have experienced the closure of our libraries and moved to remote working arrangements, the Zoom format that the conference was held in has become customary for meetings lately. Thanks to sponsors, the **conference was available freely and online**. Even though attendees were unable to convene in person, the conference provided valuable and insightful sessions and offered exceptional content in many areas of e-resource management, scholarly communications and collection development. Moderators did a wonderful job of engaging online attendees in conversation between sessions and during breaks by leading discussions about local activities and furthering thoughts on presentations. It was nice to hear from attendees about past NASIG experiences and even local weather updates in certain areas. Snow in June? It happened in Wyoming! Music between Zoom sessions was also a nice addition.



The focus of the **vision session was change management** and was presented by Janetta Waterhouse who is the Director of Tech Services/Library Systems, University at Albany. Change is an inevitable part of any workplace. The speaker identified skills to address dealing with change in organizations. Leadership styles, managing conflict and project management all affect how we handle change. Developing strategies in these areas can be an effective tool in helping teams learn new skills when change occurs.

Themes in this year's programming included:

- Approaches to linked data (as it applies to representing our collections on the Web with an overview of Wikidata)
- Knowledgebase management (for improving how we make our collections available to our users, this presentation discussed KBART, a NISO initiative)
- Electronic serials management (ideas for collection analysis)
- Accessibility audits (Web pages, Libguides and Institutional Repositories)
- Read and Publish agreements (what's needed for this to be successful)
- Streaming media (increasingly consuming larger portions of budgets, importance of accessibility and discoverability are reported considerations)

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- OER's and textbook affordability initiatives
- Counter 5 (what you can find in new report structure, OA access inclusion and R5 reporting for consortiums)
- Unsub (as many institutions begin evaluating Big Deals this subscription service can help analyze packages and looks at CPU and cost alternative access as a means of prediction)
- International publishing partnerships (a few benefits mentioned were global reach, efficiencies, brand building, effective marketing, mentorship)

How can you access sessions?

- Visit the NASIG Youtube channel to view videos https://www.youtube.com/channel/UCVnh_CzXS8YgftwlypTiQ.
- Presentation slides are also available on SlideShare <https://www.slideshare.net/NASIG/tag/nasig2020>.

Be sure to Mark Your Calendars: NASIG 2021 will be held in Madison, Wisconsin, May 17-21.

Mark Your Calendars

2020 SSP Virtual Seminar: "New Directions in Scholarly Publishing: Community, Collaboration, and Crisis"

- **September 30, 2020 | 10:00 am – 4:00 pm EDT**
- **October 1, 2020 | 10:00 am – 12:30 pm EDT**

The 2020 SSP New Directions Seminar in Scholarly Publishing will explore important new ways in which publishers and industry leaders can continue to support academic peer-reviewed research and the entire academic publishing ecosystem, especially in response to the COVID-19 global pandemic. Thank you to our sponsors, Ingenta and AGU.

More info at <https://customer.sspnet.org/ssp/Events/ssp/EventDisplayNP.aspx?EventKey=SEM20FALL>.

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The Charleston Report is written for publishers, vendors, product developers, merchandisers, and wholesalers who are interested in expanding their library market. Readers will gain insights in effective marketing to libraries, early alerts to library trends, access to library leaders' future plans, library budget projections, library strategic plans, technology directions, and publications needs.

For comments and contributions, contact Rebecca Lenzini, <rlenzini@charlestonco.com>, Editorial Offices, 6180 East Warren Avenue, Denver, CO 80222. TEL: 303-282-9706, FAX: 303-282-9743, (c) Copyright 2020, The Charleston Co. All rights reserved. ISSN 1091-1863.

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About NASIG's Virtual Experience....

... with thanks to Cris Ferguson, Member, NASIG Board of Directors and Treasurer; Assistant Dean of Libraries, Murray State University, <cferguson13@murraystate.edu>

In early April the NASIG Board made what was both a difficult and easy decision to move the **35th Annual NASIG Conference from a face to face format to an online conference**, due to the COVID-19 pandemic and the risks associated with traveling and gathering in large groups. Originally slated to meet in Spokane, Washington, the synchronous portions of the NASIG conference were held via Zoom and simultaneously broadcast to YouTube via live streaming. To best accommodate speaker availability, some sessions were presented in real time, while others were pre-recorded and played during the appointed time.

Through the generous support of NASIG's sponsors, we were able to offer the conference free of charge, drawing an unprecedented number of attendees. **We had more than 2,600 people register for the three day online event, compared to the 290 people that attended the 2019 Annual NASIG Conference in person in Pittsburgh, PA.** Attendees were able to log in and out of the all day sessions as their schedules permitted, and at times more than 900 people were logged into the sessions simultaneously. To encourage NASIG's unique conference atmosphere, we scheduled time between sessions for conversation and events such as NASIG's famous Ice Cream Social, which this year turned into Bring Your Own Ice Cream to NASIG.

In moving the conference online, accessibility played a key role in our planning. We had live transcription of the presentations and speaker remarks and made all of the presentation slides accessible via SlideShare. We used an online forum on the NASIG website to encourage conversation about sessions, giving conference attendees a place to interact with speakers and each other. **Additionally, all of the presentations were recorded and are available for viewing on NASIG's YouTube channel.**

None of this would have been possible were it not for the herculean efforts of NASIG's Program Planning, Conference Planning, Continuing Education, and Communications committees. For those that are interested, NASIG intends to put together a webinar on how we pivoted from a face to face conference to an online format in such a short timeframe. Stay tuned!

TCR Reports from the Field: SSP UKSG (Unexpectedly Virtual) Pre-Conference, April 2, 2020

... *Highlights by Heather Ruland Staines, Director of Partnerships, Knowledge Futures Group, <heather@knowledgefutures.org>*

On April 2, 2020, nearly 100 attendees joined a virtual event that replaced what would have been an in-person pre-conference at the UKSG annual meeting in Brighton, UK. Co-sponsored by the Society for Scholarly Publishing and the Charleston Library Conference, **“Seeking Sustainability: Publishing Models for an Open Access Age”** was modeled after another co-sponsored pre-conference held in November 2019 in Charleston, **“Chaos or Complexity: Transforming Publishing Models in the Plan S Era.”** While the earlier event was heavily interactive with roundtable discussions and participant report-backs, the scaled-down virtual version included an introduction to alternative models by Lisa Janicke Hinchliffe, Professor, University of Illinois at Urbana-Champaign, and an expert panel moderated by yours truly.

After words of welcome from Mary Beth Barilla, Program Director for SSP, and an electronic poll of the audience to assess their familiarity with various alternative models, Lisa kicked off her talk, **“Seeking Sustainability: Publishing Models for an Open Access Age.”** If you aren’t familiar with Lisa, she’s served as a librarian for a range of institutions from a community college, to a comprehensive university, to a research university. She’s a past president of ACRL, an editor for *Library Trends*, and a chef at the Scholarly Kitchen.

Before diving into alternative models, Lisa provided a helpful **background on library subscriptions (characterized as “pay to read”)** from print to electronic, including the evolution of the big deal and the growth of large content platforms and aggregators such as Project Muse or JSTOR. She shared warnings around sustainability of the Big Deals from as far back as 2001.

Next, she detailed an array of **open access models at both the article level: gold, green, and bronze, as well as the journal level: hybrid, gold, and platinum/diamond.** She drew an important distinction between articles that are *gratis* (free to read) versus *libre* (free to reuse). She enumerated levers and catalysts for open access. These include Mandates and Policies, from institutional to governmental, from funders or societies. Also key are Communities of Practice, coalitions of institutions or libraries, coalitions of funders, or knowledge sharing and networking organizations, encouraging support of open content and infrastructure.

This groundwork enabled contextual understanding of the **Landscape of Models** that we would spend the rest of the session discussing. Lisa broke these down into Transformative Agreements, including Read and Publish, as well as Publish and Read, with associated add-ons like rebates or society memberships; Pure Publish Agreements; Subscribe to Open; Library Partnership/Institutional Membership; and Funder Investments, via grantees or platform development. If the original Big Deal was a bundling of content that, in effect, precluded the cancellation of individual titles, the **“New Big Deal” of Transformative Agreements** “seek to shift the contracted payment from a library or group of libraries

to a publisher away from subscription-based reading and towards open access publishing.” (Hinchliffe, *Transformative Agreements – A Primer*, The Scholarly Kitchen, April 23, 2019, <https://scholarlykitchen.sspnet.org/2019/04/23/transformative-agreements/>) Lisa differentiated the two main transformative agreement models, explaining that “a Read and Publish Agreement is an agreement in which the publisher receives payment for reading and payment for publishing bundled into a single contract,” while a “Publish and Read agreement is an agreement in which the publisher receives payment only for publishing and reading is included at no additional cost.” (Ibid.)

To set the stage for the upcoming discussion panel, Lisa detailed a number of issues for consideration. Within the publishing industry, would transformative agreements simply “crown” the major publishers as “OA Royalty” and increase the prospects of smaller independent publishers being acquired? Would they lead to a “lock in” effect with ongoing APC increases because publishing is a “prestige goods market”? Would they harm the negotiation position of libraries in that such an agreement would be very difficult to cancel? And what of the author perspectives, as there have been some indications of author opt-out, as well as issues around academic freedom? And finally, but not inconsequentially, what about the vast implementation challenges and questions remaining around unfunded mandates?

Our notable panelists included representatives from both the publisher and library sides, with expertise in both STM and the Humanities. Unfortunately, Dr. Jasmin Lange, Chief Publishing Officer at Brill, was unable to join us for the webinar, **but we were honored to hear from:**

- Scott Delman, Director of Publications for the Association for Computing Machinery
- Steven Hall, Managing Director of IOP Publishing
- Ruth Harrison, Head of Scholarly Communications Management at Imperial College London
- Dr. Martin Paul Eve, Professor of Literature, Technology and Publishing at Birkbeck College, University of London and Visiting Professor of Digital Humanities at Sheffield Hallam University.

Scott began the discussion, explaining **ACM Open, the Association for Computing Machinery’s new Read and Publish Model.** ACM wants to ensure the long-term viability of their publication program as it shifts to open access in a process projected to take five to seven years, and also to maintain funding for the community initiatives that the program supports. Scott stressed the importance of having your data in order. It was important to ACM to understand the article output of institutions in specific customer tiers and how that information correlated to current revenue generated by those tiers. As a result of this investigation, ACM has decided to publish their financial information, operating

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under the premise that transparency around the model and the revenue it generates will be key to its success.

The ACM currently sells Digital Library access licenses to approximately 2,700 institutions worldwide. It publishes between 20,000 - 25,000 articles per year. Approximately 80% of those articles come from about 1,000 institutions with the remaining 20% being spread out across approximately 1,700 institutions. As a result, ACM's new **ACM Open model shifts the financial burden from the long tail of 2,700 institutions to the smaller group of approximately 1,000 large universities that publish most actively with ACM year after year.** Some institutions will be asked to pay substantially more than they do now for access to the ACM Digital Library, while the vast majority of institutions will pay the same or less than they currently pay as they transition to the ACM Open model. To make pricing predictable across the term of the agreement, ACM worked with a pilot group of institutions to develop a tier-based system using average annual article publication ranges to determine tier placement, then offering a set price for the term of the agreement. The model provides for unlimited OA publishing (and reading), moving away from a "per article" charge. This should save institutions in time and administrative costs. (<https://libraries.acm.org/subscriptions-access/acmopen>)

Following, and keeping the conversation rolling in the STM space, Steven Hall added **perspective on routes to open access under Plan S, including publication in an OA journal or platform; publication in a subscription journal with deposit of the Version of Record (VoR) or Accepted Manuscript (AM) in a repository with a CC4.0 license; or publication in a subscription journal under a transformative agreement.** While IOP views the first and third of these options as sustainable, it does not view immediate deposit of an article with a CC-BY

license as so. Why? A significant part of the publisher's investment occurs prior to the Accepted Manuscript stage, including peer review and journal development to ensure robust submissions. In the case of IOPP, which manages peer review in-house through a team of 70 professional staff, this is close to half its total cost of publishing an article, including relevant technology costs and overheads. The immediate availability of a substantial portion of deposited articles for distribution and reuse by third parties will harm subscription revenue. Thus, this represents an appropriation of the publisher's private

investment by funders and institutions. It is both economically unsustainable, he noted, and, as an appropriation of a significant investment by the publishers, morally wrong.

Steven offered further details around the **sustainability of transformative agreements, both opportunities and challenges.** Such agreements enable researchers to publish in the journals they consider best for their research while complying with funder and institutional policies. These agreements can lead to full open access publication at the local level — institutional, consortial, and national. They work best when they involve close coordination between institutions, funders, and publishers as, for example, in Austria, where IOPP is now publishing close to 100 percent of articles by Austrian authors on an open access basis. Still, there is no one size fits all model; they will vary according to the research-intensity of the participating institutions. In the foreseeable future such agreements are **more likely to be transformative of local research output than to be transformative of the global business model.** He is concerned that the issue of winners and losers is not being addressed: that is, in any transition to full open access a small number of research-intensive institutions (or countries) will bear a significantly higher share of publishing costs, while many less research-intensive institutions would be likely to see savings. How will funding be redistributed to enable this?

Ruth Harrison provided a **UK perspective with a STM research-intensive bias.** Imperial wants researchers to be able to make their work available open access, either through journal publication or through repository deposit. There is strong support for both academic freedom in selecting publications and in retaining copyright. Higher Education libraries are working in consortia through JISC on transformative agreements and open models. Affordability is key. **Imperial seeks to balance the responsible spending of public money with ensuring that researchers have the right publication options.** They want to encourage publishers to experiment with different models. Ruth emphasized that this solution needs to look beyond just the corresponding authors to serve all authors.

Rounding out our panel was Martin Paul Eve who explained the offering of **Open Library of the Humanities, a collectively funded non-profit that includes a megajournal and 27 individual journals.** Operating across disciplines where funding via APCs is not practical, OLH has been able to get commitments from 300 institutions in five years. The collective funding model is similar to the newer "subscribe to open" model where subscribers pledge to keep subscribing to keep the journal open, but, as an OA platform starting from scratch, OLH had no subscriber pool to draw upon.

Martin did not want to sugar coat the success of OLH. Starting a new business model involves substantial outreach and education and the labor involved in marketing was significant. The **growing demands for transparency around revenue and expenses concern him, as a small publisher.** If smaller organizations need to hire dedicated staff merely to address growing transparency requests, that alone will increase their costs. He also struck a cautionary note around funder mandates which are currently heavily focused on the APC model. If the goal is true innovation in the ecosystem, we need to enable flexibility for folks to come up with new ideas.

Ed Note: Heather's full report is also available at <https://against-the-grain.com/2020/05/atg-original-charleston-report-ssp-uksg-pre-conference-report/>.

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