It's Not You, It's Me: Breaking Up with Perpetual Access

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It's Not You, It's Me: Breaking Up with Perpetual Access

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Abstract:

Perpetual access to electronic journals is viewed as an important investment for libraries that have canceled and discarded their print journals, or that fear losing access to online journals. But does perpetual access really matter? In 2011 the Collection Services division at Concordia University Libraries in Montreal, Quebec, undertook an extensive review of usage statistics for our Elsevier journals. The original goal was to identify low-use journals in our core collection in order to swap them for high-use titles from the ScienceDirect Freedom Collection, thereby gaining perpetual access to those titles most used by researchers. The exercise produced some interesting results, and prompted collections librarians to question the actual value of perpetual access journal rights.

Data and Analysis

Concordia University Libraries subscribe to Elsevier journals through the Canadian Research Knowledge Network (CRKN) consortium. Similar agreements exist with other consortiums and libraries in North America and globally. With just about 2100 journals, Elsevier is the largest "big deal" package that our library has through CRKN. It is also the single largest expenditure on our electronic resources budget, making up approximately 17% of our total expenditures for electronic resources. Given that Science, Technology, and Medicine (STM) disciplines, with the exception of Engineering, are not Concordia's strength, this is a substantial budget commitment. However, overall usage of Elsevier journals at Concordia has always been very good. Due to the improvement of our ERM infrastructure, specifically the implementation of an ERM system in 2008 and the loading of e-journal holdings into our online catalogue, we have seen some significant increases in usage of Elsevier journals over the last four years. As a result, we consider this expenditure a very good investment.

In order to set the stage for the subsequent usage analysis, we need to highlight certain conditions of the license agreement. Essentially, Elsevier specifies a list of journals that are Concordia's 'core holdings'. These are journals that we subscribed to individually when we first entered the CRKN agreement in 2004, as well as additional journals that have since transferred to Elsevier. As part of the agreement, we are committed to uphold these subscriptions and, importantly, we will retain perpetual access to these journals in case we discontinue our participation in the agreement. In

addition, against a proportional fee we get access to most other Elsevier journal titles, the so-called ScienceDirect Freedom Collection. In case we discontinue our participation in the CRKN agreement we would not have access to any of these journals that are now part of the Freedom Collection. Annually, Elsevier offers a title swap option. This allows participants to drop titles from their core journal lists, presumably those titles that see very little use, and exchange them for high-use titles from the Freedom Collection. The benefit is to obtain perpetual access rights to content that is evidently more used. In a limited way, it gives libraries the opportunity to perform some form of collection development in this big deal package.

Our usage analysis included all 2100 journal titles that are part of the Elsevier ScienceDirect journal package. 148 of these journals are our current core holdings. The remaining titles and large majority make up the Freedom Collection. We collected COUNTER usage statistics from Elsevier for four consecutive years, 2007-2010, and our examination relied specifically on data from Journal Report 1, which provides the "Number of Successful Full-Text Article Requests by Month and Journal". We compiled the YTD totals for each journal into one single spreadsheet and highlighted those rows in the spreadsheet that listed our core journal.

By using the sort and filter functions of Excel we looked at the spreadsheet data to examine how our core journals were comparing to the overall usage in this package. We were pleasantly surprised to find the great majority of our core journals consistently in the upper 10% in each of the four

years examined. However, there were also a handful of core journals that ended up towards the bottom of the list, with no or very low usage. As expected, we also saw that there are some journals in the Freedom Collection that have consistently higher usage than even our most used core titles.

Certain factors influenced our decision-making in terms of what journal titles to swap. First, it proved useful to look at usage over a significant time period of four consecutive years. For some titles we saw ups and downs in usage over the years. In contrast, usage of other titles was very constant. We felt it necessary to look at usage trends rather than a point in time, and it was easier to get buy-in from subject librarians, particularly for our drop decisions.

Second, in examining the usage numbers we found ourselves circling around the same question: What is good usage? In the library literature this question is most often answered with cost-per-use data and most benchmarks for good usage depend on a cost-per-use breakdown. Some journals are much cheaper, so even with low usage they do not stick out as much as more expensive journals with low usage. Although we were able to quickly add list prices to each journal for each year in the spreadsheet and calculate approximate cost-per-use, it was still not clear what our benchmark should be. We discussed some possible figures, including ILL/document delivery costs and Elsevier's pay-per-use rate, and finally agreed on \$20 per article as an appropriate benchmark. Applying this figure certainly confirmed those journals as drop candidates that we had already identified based on usage. However, if applied strictly it would see us drop 20% of our current core holdings.

As already mentioned, dropping 20% of our core journals requires that we add titles of an equal value as outlined in the license agreement. Where it had been relatively easy to identify journals to drop from our core, we suddenly found ourselves questioning what titles to add in exchange, particularly when we started looking at the subject area of high-use journals in the Freedom Collection. Specifically in the context of perpetual access, it appeared important to consider if there is a true value in picking up journals from certain disciplines

that rely largely on the most recent research findings. This final factor outweighed both usage and cost-per-use, and ultimately led us to reconsider our attitude on perpetual access.

In the end we dropped only five and added three journals to our core holdings. This in fact decreased our core subscription value by almost \$3000, the maximum allowance set out in the license agreement, something we had not initially intended to do. We are convinced that subject discipline is a relevant factor for us, but it seriously hampered our willingness to take up certain titles in exchange for others. In addition, it seems unlikely that we can manage this kind of thorough analysis and the shifting rights to individual titles in the long run. We concluded that the perpetual access we might gain is not worth it: it is not worth the administrative pains, nor the uncertain value for anticipated future use. As it stands we will have to deal with, re-examine, and reintroduce proper serials collection development practices only if cancellation of this big deal becomes a reality.

Implications for the Future

We are still discussing how these findings will influence our future efforts in monitoring usage of big deal packages, and taking advantage of the swap option for Elsevier and other large journal packages. However, we are starting to think about our journal collections in different ways. We can no longer afford to keep a journal because "we've always subscribed to it" or because we are worried about losing access to the backfile. Instead, we need to be more comfortable with the long-term lease model in which we have deep content until we don't. The "until we don't," though, must be at a point of our choosing and after we have gathered data including statistics, usage counts, cost per use figures, and qualitative user feedback from faculty and liaisons librarians.

In many situations, perpetual access is a truly important investment that libraries should make in support of their users and to ensure access to valued content. In other cases, however, and as demonstrated to us by this exercise, it can prove to be a costly and ineffective insurance policy for "what if" access to low-use journal titles. In 1962 Neil Sedaka sang that "breaking up is hard to do,"

but sometimes you simply need to make a clean break. Breaking up with perpetual access takes time, effort, data gathering and analysis, but also

some courage and a willingness to experiment with delivery and access models.