What’s the Big Deal? Preparing for Transformative Agreements

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Length: 5 minutes

Hello, my name is Rebecca Gerber from the Lamar Soutter Library at UMass Chan Medical School. I am presenting this poster on behalf of myself and my colleagues, Sally Gore, Lisa Palmer, Leah Honor, and Tess Grynoch answering the question what’s the big deal about preparing for transformative agreements.

Since the open access movement emerged more than two decades ago, libraries, publishers, funders and researchers have struggled with sustainable publishing models in the complex scholarly communication environment. Fully open access journals typically use article processing charges to generate revenue and many other publishers have moved to this model to offer immediate open access to individual articles.

With growing scrutiny on library expenses, publishers have begun to offer transformative, or “Read and Publish”, agreements, which combine payment from subscription-based reading with open access publishing costs. These agreements provide free or discounted open access publishing for institutional authors along with reading access to paywalled content.

The Lamar Soutter Library has received an increasing number of offers to switch to Read and Publish Agreements. The library’s collection development and scholarly communications librarians have complementary knowledge areas which together can inform decisions on these agreements, for example, understanding resource usage statistics and the ability to pull together institutional bibliometric information, respectively. Currently, the Lamar Soutter Library has two read and publish agreements with Cambridge University Press and The Company of Biologists but more opportunities are expected in the near future.

To help us determine whether a Read and Publish agreement will be a good deal for the Library, we consider the following:

• Total reading usage per vendor, with tracking of how much is available open access
• Article Processing Charges
• Total spend in the previous 3 years on publishing costs
• Understanding our internal stakeholders’ needs and wants for publishing
• Reading the agreement terms to ensure that they meet our needs and provide a path forward

Based on the usage data and the volume of articles published, we will determine how much of an impact having an agreement would make for our community.

We have begun collecting the necessary data for all publishers so we can make these informed decisions more easily. Thus far we have collected ejournal spend information for the library from the past 7 fiscal years and amount spent per publisher for the past 5 fiscal years.
We also emailed 65 publishers in March 2023 to request publishing data of UMass Chan including costs paid by researchers to publish their articles. After one month, half of the publishers have responded with various levels of data. The best cost information we have received thus far is from BMJ which provided yearly cost in British pounds for 2018 to 2022.

Our next steps are to

- Pull together publication and cost information for publishers that were not able to provide it.
- Create a central location for information about subscriptions including costs, amount of open access publishing, usage, and contract terms.
- Create an intranet portal for UMass Chan authors to make informed decisions about publishing Open Access and the benefits available from read and publish agreements.
- Continue to request data from publishers including associated costs.
- And, begin to talk to key personnel at our institution about gathering open access publishing data, educating non-library staff on the upcoming changes, and getting feedback on how we can better support the authors’ needs.

What we have learned from the process thus far is that

- Publishers are struggling to provide this data, much as libraries may be struggling to gather the data internally.
- There is no consistency in the information that is provided – it would be nice to have a standard report (like COUNTER reports) for comparison and evaluation purposes.
- Even when data is provided, there are no definitions provided for columns.
- So, for now, Scopus, Web of Science, PubMed, or Dimensions (or some combination of these) appear to be the best ways to collect publications data, though the calculation of total costs may need to come from the publisher.

Thank you and please contact us if you have any questions.