

## UNIVERSITY COMMITTEE ON LIBRARIES: 2004/2005 JOURNAL PACKAGE ANALYSIS

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May 6, 2005

An analysis to determine the potential savings of leaving the Big Three journal packages was carried out by the Libraries' Collection Development Committee in 2003-2004 and presented to the University Committee on Libraries in December 2004/January 2005.

### *Fiscal assumptions:*

The University Libraries will manage its funds in the ways that best serve the University as a whole and the teaching and research programs currently in place.

The University Libraries must operate within the fiscal resources made available to them from the University.

The University Libraries will take advantage of campus programs, seek both internal and external opportunities, and pursue campus, state and consortial partnerships to leverage available funds and to identify additional resources.

### *Assumptions and constraints of the 2003/2004 package analysis:*

- In conjunction with faculty input regarding critical titles, cost per use emerged as the most significant evaluative principle. Impact factors and journal half-life were also acknowledged as important indicators of value.
- The anticipated document delivery of outstanding downloads was anecdotally set at 20%. The document delivery cost per request was set at current prices (\$30-\$33).
- The use data (total number of requested downloads) was from one full year only (2003).

### *Findings, observations and recommendations:*

- Potential savings varied considerably from package to package.

Analysis should focus on each individual package and not on the packages as a single aggregate.

- The relative distribution of titles across disciplines also varied from package to package.

Leaving a package based on cost per use will change the historical distribution of subject-specific funds.

Nevertheless, the broad coverage of package access ensures the quickest response to new directions in research.

A decision to leave any specific package may require a greater consideration of the disciplines as a "whole" rather than as discrete parts.

Balancing the good of the whole with the good of its parts may require various strategies.

- Though undetermined, the overhead cost of leaving the packages was anticipated to be significant.

"Delinking" of unsubscribed titles, the realignment of current subscriptions and the maintenance of a process that would monitor these subscriptions based on cost per use would all require significant planning and resources.

Nevertheless, staying in the packages will also require on-going analysis and evaluation. Since the conditions and use of package subscription can change dramatically, analysis of their cost effectiveness should be done on an annual basis and in such a way that provides time for adequate consultation. This process should be greatly aided by the Libraries' newly created a "Serials evaluation database."

- "In package" inflation of subscriptions provided by multi-year contracts is less than Aout of package inflation.

Notre Dame has been on one year contracts for the last three years due to budget restraints and uncertainty regarding financial ability to retain packages..

Analysis of the packages should also include a projection of this differential in order to determine when it wipes out any real savings.

Nevertheless, regardless of contract length, the "in package" inflation rate of electronic journal subscriptions is still higher than expected increases to the Libraries' material budget.

### *Implications*

- Leaving Kluwer/Spriner

PRO: Significant commitment reduction (\$179,089)

Annual inflation based on the cost of only the individually subscribed titles, an amount one third less than the full package cost.

Return of collection flexibility to the title level.

Opportunity to develop the organization and expertise to deliver and maintain 1) an enhanced program of electronic document delivery and 2) a collection evaluation process based on cost per use.

CON: Reduction of immediate electronic access to package titles, affecting primarily Mathematics.

Loss of broad coverage provided by immediate electronic access to the full package list.

Teaching and research opportunity costs related to reduced journal access.  
Library opportunity costs related to Adelinking unsubscribed titles and the development of the organization and expertise to deliver and maintain 1) an enhanced program of electronic document delivery and 2) a collection evaluation process based on cost per use.

Uncertainty regarding cost of and access to previously subscribed backfiles.

Higher annual inflation rate applied to individually subscribed titles than to the full package of a multiyear contract.

Initial draft prepared by Dave Jenkins in consultation with Parker Ladwig and Gay Dannelly, 5/5/05.