

0:03

Good morning, everyone I'm your chair for today, and we had a very good session yesterday afternoon and for today's session, we just hope as useful and a lot will be gained from it.

0:19

First panellist and our first our first speaker today is a joint presentation between two colleagues from the University of Nottingham.

0:28

Paul Cavanagh and Julia Baldwin

0:32

They are going to talk about transformative agreements, decision making in the library and the university of Nottingham prescriptive, on published agreements, this is very topical at the moment and very timely.

0:44

So, it's a bit of ahead of schedule I am happy to hand over now if you're ready Thank you

1:00

Yeah, that sounds fine.

1:04

OK, pick up my hand as well, Green.

1:13

OK, perfect, OK, can everyone hear me and see me?

1:19

I certainly can, We can.

1:22

OK.

1:23

Just noticed we're not getting, um, captions which I thought would happen.

1:37

Sorry, I'll just double check that all my captions are on below Slide, OK,

1:45

Definitely be working now, hopefully.

1:49

Still, not working

1:52

Think I'll have to proceed and hope for that, the captions might kick in

1:57

Not sure what else I can do at this point.

2:01

So yes, hello and welcome everyone. My name is Julie, I'm a research librarian in the University of Nottingham Research support team stand with my colleague, Paul, who is a senior librarian for resource acquisitions. Also, Nottingham today where we're looking at bringing you our take on read and publish agreements all University and what we're doing it in this regard.

2:31

So just to kick off, if we get back to the start thinking, what we mean when we talk about read and publish agreements or transformative agreements, this is how we sell these agreements to our students and staff. So, this comes directly from our our webpages.

2:50

So, on the other thing to note is that already we're switching between language a bit, and Paul and I will definitely do this throughout the presentation today. So, we may call them transformative agreements, or transitional agreements, transformational agreements, I've heard as well, written published agreements, we didn't publish deals, so but essentially, we're all talking about the same thing, where they are contracts negotiated between the institution and the publisher, looking to transform the business model underlying the publishing system towards a fully open access model. So, it's representing that next step, that future further shift away from a subscription only model.

3:32

To one that covers both the subscription payment, so the read element of the agreement, and also the article processing charges. So, the publishing element.

3:41

and in the UK, our agreements specifically are negotiated led by Jisc Collections who do this action on behalf of all higher education institutions. And in terms of Nottingham, this is the main way that we've been approaching our agreements we take up and review. So, we only currently look at agreements that have already been negotiated through. Jisc.

4:13

OK, so, as Julia says, we will use, this inter changeably, and I think that's one of the kind of areas of confusion, as well. Say, like, the language, is one of the things that we've had to kind of finalize. And just talk a little bit about budgets than, say, as you can see, this is this is sort of previous year's budget.

4:33

But approximately periodicals budget is 5.23million which is not the largest in the sector, but it's also like enough that we're able to kind of manage to purchase.

4:47

It's a fairly large number of transformative agreements as it says there as well.

4:52

transformative agreements only funded from the periodicals budget so at the time of writing for the original presentation this was true. And we can talk a little bit about what we've done in order to kind of manage that from from other funding areas that. But the periodicals budget remains as sort of main.

5:13

Our main source of funding for this.

5:16

Yes, so say, that kind of gives you an idea and also an idea of how many there are, I will just hand back over to Julie.

5:23

Yep, so as we say, we've got reasonable budget in the library, and we've got quite a few TAs now in place.

5:33

And this is taking up as you'd expect quite a lot for our staff resource as well. I suppose so, we have multiple staff resource acquisitions. Look into these and working with these directly. As we do with quite a few members of the research support team, and we also have colleagues in our Research Innovation Department, which is like our research office at the University of Nottingham.

6:01

To give a bit of context in terms of the sort of size of research output we're looking at. Nottingham, we have quite a large research base here, so as a sort of proxy of a proxy for, for our research sort of output. In the last ref we had a pool of 30,000 ref outputs choose from, and they were coming from 1800 research staff. So, so quite a large research output that we're trying to support with these TAs.

6:40

OK, so, we will go back in time, we'll go back in time to 2020, And this is really about how we put together. It's OK, we put together the reason the rationale behind why we put together a group.

6:55

So a key strategic priority for the university is to basically from a research, allow our authors to publish. So this is kind of the context under which we restarted book an effect effectively, What happened was?

7:14

We, from a resource acquisitions perspective I was constantly coming back to members of the research support team to Julie's team in order to kind of like take on a more holistic view of these agreements.

7:31

And the, and, as it says there, it was really, really challenging and difficult. And I think the kind of different thing about this agreement is, and this is kinda perhaps where it ties into the assessment side of things, is that, for traditional agreement, you would, you would look at your usage and you would look at your content. And, you know, what new items are, you getting? what things are coming in, what things are going out? And I think what it became clear was that we couldn't do these read and publish agreements, The TAs deals without the input of the Research Support team. Because so much of it is, a key part of the agreement, is, is the publishing aspects, and, and it's complex.

8:09

So, what I've got, there is a little bit of a quote, which is the exact words from an e-mail I've put together where I sort of reached out to my colleagues and said, we need start tackling this together. And as it says, that we've had several smaller published deals announced recently, alongside the larger deals, I'm funny, challenging to review and share feedback in a timely manner. She wasn't able to do it mainly due to the complexity of the day, and short timescales for feedback. And I don't think members need to attend every meeting, but there might be something which is relevant around a particular deal which needs to be reviewed. And it will help us to prepare and co-ordinate responses. And if there is no deals. We can skip the meeting for that month. We have never missed a month of a read and published group meeting. We've gone, week in week out and the month in and month out.

9:00

And the reason why we've done that is because, again, we need to discuss the options. We've actually found ourselves having meetings outside around some of the specific, larger agreements. We have worked to disseminate the information, as it says there, to establish

some value from any indicators outside of the traditional kind of usage, content kind of ones, and really started to co-ordinate those responses.

9:23

I think probably the last bits to point out. So, the read and published group has a lot of autonomy, in terms of decision making, in terms of what agreements we take on, which means that we can probably be about efficient and fast as we can be. And the other thing there, which is like a, has been an ongoing conversation since 2020, is around funding and how we manage that. And it is, as it says that a high level strategic conversation that we are trying to have across the University, And we'll talk a little bit about how we manage that.

9:58

So when we were looking, as Paul says about who would need to be on this group, it was clear that we needed multiple different people involved in in this piece of work. And a bit of context for Nottingham in terms of our library structure. We're very much more on the functional model of libraries rather than the subject based teams side. So we have, each teams of has a different function. And so in order to do something like reviewing a read and publish agreement, we needed definitely members from our resource acquisitions team who's sort of main. Areas of responsibility were around the purchasing resource management, making sure we're getting value for money in terms of content. But we also needed members of the research support team to look at publishing information and gather data from that. Make sure we're giving out the right researcher guidance.

10:52

Make sure we are covering our funder requirements, but as well as that we also needed colleagues from our research and innovation department, which is all research office, which sits outside the library. And that's made a large part of that is because they have responsibility for our block grants, that we get off on the block grants, and they have budget trends, oversight, and responsibility for the reporting side of things. So they needed to be a conversation too. We set up this group knowing that we were setting up group, and sort of a wider range, an ecosystem of groups within the university. So we have a library open research group, We have a high level University of Nottingham open research group.

11:40

We have teams going along to faculty research boards and teaching boards as well and other smaller group or other groups within the library and outside of the library, like our copyright working groups.

11:58

So it's all making sure we were, we were in the right area responsibility and knew who are key stakeholders, were you know, outside of the group as well.

12:10

So, when we first started having these conversations starting, you know, sort of informal, and then leading into our first few conversations of the read and publish group meetings, we were having quite a lot of general discussions, starting to pick apart some of the sort of key principles and areas where we thought we wanted to make sure we were really look into. So, some of the sort of high level things we were looking at were around, do our TAs benefit the greatest number of researchers?

12:50

Is there a chance for any of our publishing agreements might create unequal publishing tiers for our authors.

12:56

So one of the things we're really keen on was making sure that we don't just essentially shift the barrier for reading to the barrier to publishing. So we wanted to make sure that everyone had a fair, a fair shot at it. We're obviously making sure that we wanted to not only meet the needs and the specific details of the funder requirements so the ref, UKRI requirements, plan S

13:23

all of these things, but also, moving in the same direction, in terms of the underlying principles of, of where those funders we're trying to get to as well. So things like looking at rights, retention, for example. But at the end of the day, of course, this isn't our main job. We have other hats.

13:42

We have many other hats to look at, to where, and we wanted to be pragmatic as well.

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So, often, a lot of the conversations were around looking at is something maybe a true task that really transformative or actually, is it better than what we have before?

14:03

Is it good enough for now to move things on? We had some great conversations, and, again, with the different people on the group, it really, it really helped us to sort of unpick some of these things. And I'm really getting that pragmatic versus principled approach, making sure both sides of the conversation aired.

14:26

Yeah. Absolutely. I think probably what I would say there is, as you can see, how we have got some very sort of traditional things that you'd be looking at, which is, you know, what do you take? costs, whether there are any opt outs, whether there's a read only option, what content you would have, and what license permissions and restrictions you would have. But alot the ethics questions really come in, particularly around the publishing. And what is available for our authors, and as Julie says, whether it increases their ability to kind of like publish.

14:58

And I think in some ways, we've seen these deals change over the over the time we've been doing it, say, Ironically enough, like, if anything, we're seeing things, probably more and more parceled up.

15:12

And this, this thing that we prefer, which is kind of like, what we ideally want, is a, is a, kind of, like, comprehensive read and publish agreement, which covers, which covers both aspects, and, and it's quite straightforward and simple. We've actually seen, kind of, if anything. So fragmentation of that, again, we'll talk a little bit, and I'm just riffing away here anyway.

15:34

Yeah.

15:38

OK, so, I think, what's really, really helpful and there's no audience interaction here, but I'm going to ask the question. You don't have to respond, but, anyway, what do you think this is?

15:51

A butterfly. Exactly, Exactly. This draft consultation, feedback cycle butterfly.

15:58

And really, what we wanted to do was kind of outlined some of the processes that we've got here, wherein you have the work coming in and out with the group. So, we will receive consultation documents. We will get a license agreement and proposal. We were doing the analysis, the costs, and the data. We will compare year on year where we have the information. It will go into the reading publish group for review. And again, we'll look at some of those indicators around APC, so it's this wider kind of review point. And some feedback to Jisc, and I think this is probably worth saying here, that this is just literally the consultation cycle. We're talking about here, we're not talking about kind of final kind of decision point or anything like that. A huge amount of work even just goes into this sort of consultation feedback.

16:48

So if you are looking to manage these reviews, particularly within a kind of like UK based environment where you're working with these Jisc TAs, it really gives you an indicator of just how you have to draw on the expertise and the expertise comes in and out. The information comes in and out. And eventually what you're able to do is kind of like have a, have a sort of like full both read and publish assessment.

17:17

So as Paul has sort of demonstrated, there is a lot of information transfer within our group. And a lot of it's coming in, and a lot of it's coming out of the group and taken away by different people. So that means managing an awful lot of information in the best way possible across a lot of people. So luckily, as librarians were quite good at that. So we've got now quite a really slick information sort of management protocol is how we approach things. So ahh, sort of main piece of documentation that we use, which you can sort of see here on the screen, is our review criteria matrix. So this is a very large spreadsheet with a lot of information is detailing all our costs.

18:08

The APC details information about things for authors.

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And we all, people on the group who have to take away parts and review it, would then come back in and put in a little bit of the of the process. So, when we get to, having the whole thing, completed for a deal, will then make that decision based on the information in there, and that will be completely transparent, and everyone can, can see that, and see all the information that went into making that decision. We also have a, we have a team now, Microsoft Team for our group. And we also have a shared notebook where we, again, list all of our meeting notes and feedback, all decisions and actions.

18:59

So again, it's it's super clear and transparent for everyone to see what's been going on. If you missed a month, if you miss a month's meeting, for instance, you could go back really easily and check what's been happening.

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And then we have quite a

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Carefully managed file structure. We have shared folders, publisher level, and then different sub folders, as well for each of the TAs. And that will include all the details for each of the TAs. So the license feedback, etcetera, if you ever needed to pop in and check a specific detail, it's all available.

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So yeah, and that's what it's working really well with I think everyone feels really on top of how, how we're working in this way.

19:52

OK, so I think probably one of the things that I would say that this is, this is my point coming from, like, a content background. So what we're talking about here is the final review process where we would decide as to whether we're going to take an agreement or not. And this is where you can see those different strands that we're talking about. About receiving the final documents for just the comparison of publishing data and the course content. And the group view, which, again, is since there is often done in parallel, is we're receiving other kind of information for deals and things like that, and a decision to accept or reject. So I tend to do most of the confirmation and liaison work with Jisc, in that sense.

20:34

So that is more like a traditional publisher liaison type role of feed back to, you know, my colleagues, whether they're in acquisitions or whether that their research support.

20:46

Something, just to really kind of highlight as well is what we call post decision work. And, and we couldn't really think of a better way to put it, but you'd think when you finish, when you accept a deal that's the end of it. But it isn't, you might have kind of accepting. You might have authors which are now eligible to pinch the agreement that previously published, that you can bring in.

21:07

You might have, various other kind of sort of things coming in.

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So, for example, we will have deals which change. Intra deal we will have changed, you see year on year, is new content gets at age, and it needs to be checked, it needs to come back.

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Every time you're doing this, it's really yeah, more work, and obviously, it's informed by the previous reviews and everything like that that you've done.

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But you really, then, have to kind of, like, manage your TAs and often, say across the three, the three year deal, you know, you will go back to it once twice, three times, because each time, it will be slightly different. There'll be another edition. There'll be new titles, though, when you open access options.

21:49

And, I think when we started this, I think, for me, certainly, I thought we would kind of like, except to deal, and it will be fire and forget, and then, we wouldn't look at it again for three years. That's absolutely not the case, and certainly, I think for research, supporting colleagues as well, there will be the people who will be, you know, accepting the authors in that sense and liaising with our research innovation team over the finance and various other bits and Bobs.

22:12

So, you know, it doesn't stop, I guess, is what I'm saying, is these deals continue to evolve and different iterations, come back, So a sense of it depressing, but anyway, it's just what you have to do.

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Yes. So just sort of getting into that a little bit more, as Paul says, to actually operationalize TA.

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There are lots of extra elements that we need to make sure are in place.

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So if we go ahead and accept a deal, we need to make sure that we've got the right people getting initially set up on any new systems, making sure everyone's had the right training. They need to make sure they're able to do the work. Again, sort of like Paul was saying, something I call retrospective, post acceptance, back work, which is a bit of a mouthful, which essentially covers things like, any refunds we need to look into and double-check any retrospective open access.

23:15

So, for instance, if a deal starts halfway through the year, and they offer retrospective open access from the point of starting the deal, so say from January, making sure that those, those offers are accepted in supporting our of our authors, in their conversations with publishes about this. But also making sure all the information has been updated on our repository system. So all the systems are now showing the correct information from, pull side of things in acquisitions, He's looking into the invoicing and payment side of things, for the deals. And then of course, we have all of our author guidance and author comms letting them know about the deal and helping them with with how to use it.

24:09

Absolutely. And I think probably one of the things we just wanted to mention as well is what happens if you reject a deal? So, we have rejected deals. And usually, it comes back those kind of ethical things, and we have rejected agreements because we felt it created a kind of like a two tier structure for our authors. And therefore, we couldn't accept on that basis. And then it goes back and you're trying to negotiate a read only option. So this is why we still kind of our strong advocate of having a read only option, because the publishing might not work for you.

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There, might be published read options wherein you effectively are still sort of like paying to publish in that sense. And sometimes you can reject agreements out right There. It's, it's something wherein, for example, you might continue chair having individuals' subscriptions, titles, and no publishing options, and I think just that kind of, like, ongoing, as well that that work, which is ongoing about kind of managing things, that research fits into an excellent job kind of maintaining documentation, and showing the authors, are aware of any deals which are available. We will all be kind of managing these new and existing agreements were kind of like working for renewal cycle, which, which again, is something which is just ongoing.

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It doesn't stop troubleshooting TAs as well. Sometimes they don't quite work has, as publishers intend, and you might be going back a lot to clarify with publishers around sort of licenses or kind of author?

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Sort of What's the word eligibility, all that kind of thing, so yeah, It's it's a slight Yes, sometimes publishers don't understand their own TA's, which can be really difficult. But anyway.

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Yes, so all that thing, it's, it's like an ongoing cycle. Got trigger happy, and that's such a tiny steps, isn't it?

26:05

So, um, we sort of talked a little bit about some of the challenges, but essentially.

26:16

I think this is you Paul. It is, I say. It's OK. So. yeah. The kind of things that we're talking about then. Yeah, managing the agreement cycle.

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I think probably we're having conversations now, but I think with the fairly large number of TAs, we've got it, it's probably about about maxed out in terms of capacity. And, and I think that that you need to be aware when you're signing up to these agreements, that, there will be all of this ongoing work. There's also things like constitute consultation and institutional review. So if somebody's larger things, like, say, for example, Elsevier or T&F, That is something where we will have some input just because of the size of the agreement and the cost and the impact that it has so that will be where.

27:02

Our assistant director, Chris Middleton does a lot of negotiation at higher levels which feeds into a group.

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We've also got, as it says, there a year on year cost increases. So as you transition over from your your published cost to read costs. Obviously one of the advantages that you've read cost is that it doesn't attract VAT, but as you're going back into having more publishing, that will attract VAT. So you know, the savings that you might potentially made from VAT changes are going to be erased.

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And if you're having three to 4% plus, 6% sometimes increases, then yeah, that is going to sort of sort of wrack up.

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And I think really this is why some thinking long-term about how you're going to fund these agreements, particularly if you are working in different cycles, is really required. And that's one of the conversations we're having.

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Yeah.

27:58

And then, in terms of, sort of, within the, deals themselves, there is some challenges in sort of managing them. So we're seeing things like terms changing in mid agreement. So, again, it's where, essentially, in a position, where we're always needing to react to what's happening in the publishing world. So, so, yeah, terms changing mid agreement, like Paul said before, some titles coming in, some titles going out. Some publishers are taking over other publishers and then it's, it's just working out, making sure we know exactly what the terms are. Any one point.

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That also applies to when we hit for instance any publishing caps or changes in the APC charges. We have to, you know, sort of, re establish what processes are in those scenarios. And then, of course, there's just the general troubleshooting agreements not working as intended if, if, either the author publisher, us, haven't done something specific,

and just working to make sure that the agreements are running as smoothly as possible, Particularly for our authors.

29:08

Then, of course, you've just got the general organizational challenges that come with any work in a large organization. So, making sure we have input from stakeholders outside the library. When required, making sure that we really are supporting the research and teaching needs of our institution, And particularly making sure we really are facilitating support to enhance the university. And then, also, working our position, in ever changing sort of publishing culture.

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Where sometimes, things like research, ethics, and AI come into play. So a good example of this is around corresponding author, being eligible author in, I think, all of our deals, possibly not plops, actually, which we've only just signed up to.

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But that can have ethical implications. Corresponding author isn't just necessarily a administrative role.

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So, there's, there's a bit of, sometimes friction, in terms of the ethics of this. And that obviously can also have EDI implications as well.

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So it's working out where we sit in, in some of these ongoing scenarios round and round, written publish agreements situations.

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That's, there are reasons to be cheerful. There are reasons to be optimistic. And I think probably what I won't say. It's kind of really positive things that we've we've got out of the deal in particular. So one of the things that's really helpful is the transparency of our decision making. So everything that goes into the group is well documented. We have, like, rationale, and those value for money indicators that we helped us to make those decisions. As it says, it is evidence-based decision making. It's just a different kind of evidence. So, you will still be reviewing your content. But, you know, and I think probably what I would say here is.

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This is where the, where the real value from, from my research foot team colleagues comes in.

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You know, I'm always in awe of the work that Julie and her team do, they are superb.

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And I think it probably, we wouldn't know, I would not have, had the expertise, or the knowledge, to have reviewed this, I think, too, to the standard that's required. So that holistic approach is a real kind of benefit. And it's a great sounding board, I mean, absolutely, really good to kind of have these discussions and really dig in, and what the agreement means for our authors.

32:01

And yes, and right back at you Paul with your resource acquisitions colleagues, I think.

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I think one of the main things to say is, so the group is super inclusive, but I think it's the work that requires it to be collaborative, like you, like, Paul says, you? You probably could, if you had to.

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Do it one-sided, but it's, it's so much more, we found it so much more beneficial to work with our other colleagues on this to really, like Paul says, get that holistic approach.

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And it's really improved relationships, I think, across across our teams.

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So, functional models that sometimes does get a little bit siloed. But I think the way we've been working, we've got such a much deeper understanding of each of the other team's work and how we can work together, and how people, you know, generally work, so we can really approach things in a really inclusive and informed way, as well. And it's not only our colleagues in the library who were working better with, but also publishes, I think, in the past, maybe, from the research support team side of things, you have some sort of agreement or discount deal, and it's sort of like, That's it. Is, this is what the publishers offer it, and we've signed up. Whereas now I think we're having more conversations with publishers, making sure we want both get as much out of the deals as we can.

33:31

And then the other part, which I didn't really talk about earlier, when we're talking about the makeup of the group, but, uh, the, uh, um, the structure within the group itself, is really, it's really flat. So, we have a real range of people in the group. We have people thinking really high strategic levels, such as the associate director for content and discovery, but we also have people on the ground.

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So our gold team members who really working with these dashboards and agreements on a day-to-day basis. So, it's really making sure, we.

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Any decisions we're making, ah, makes sense in terms of how it's working on the ground, and then also being able to push up into those higher level areas where we need to and where we might need to have additional support from the university or wider.

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Wider input? So we're getting seats at the right tables in that sense, as well.

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And I think having all that expertise in the group also makes it, that we have everyone has really strong stake holding in the group. Everyone really is the wanting the best for the source.

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They're part of, of the agreement bringing together the, especially the sort of two sides. I think, both know that the other one is going to really work hard and have these difficult conversations sometimes about making sure we're doing the best by our authors and by our institution. And so that really fosters a real great level of trust.

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There's a lot of work that happens outside the group.

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So, I think we all have a really strong sense of trust, that Paul might go away and do his bit, and then I'll go away and do my bit, and we'll come back together and know that that's, that's happened, and people have really done the best of their abilities.

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So, it's, it's such an inclusive piece of work we're doing, I think.

35:48

Yeah, totally agree. Yep, that trust is, is, is key: And? I think probably, as it says, there, because we have quite open and, I would say pretty robust discussions, as well. As I say, there have been agreements rejected that we probably could have accepted on a kind of like content basis. But actually, they were not the right deals for our authors and we had to kind of evidence in decision making points to show that, I could argue that with confidence.

36:18

So, it kind of, it kind of helps you feel, um, you have an evidence base, which shows how you've made those decisions, You have these indicators that tell you how you've done it. And as it says, that, you know, our processes are really, really streamlined, and that's some of the work that we've been doing recently, is like mapping these out, so look for kind of any bottlenecks, and actually, it is very streamlined, It's, it's, it's, it gives us access to?

36:44

The publishing, which otherwise would happen kind of, I think, in a vacuum. I don't think it can do that. You need the people who are working with the, with the academics, and the authors and the researchers to really kind of like sell that to them, and, of course, access to content.

36:57

So, that's kind of kind of my area of the content management and, and, and really understanding what it is that, that we're getting and being able to present that to, you know, ensure that we're meeting the teaching learning and research needs of our staff and our students now, researchers. And some good promotional opportunities as well. You know, we, we have been able to kind of go back and promote deals, We. It's obviously really positive. Academics, researchers are very happy when we tell them that they can publish in these journals. And sometimes it will be things that they are flagged with the group. Usually, we will always have at least been aware of the agreement, but it's good to show that.

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There is a response which comes from the group, which means that, you know, again, there is like that feedback with them, and so, yes. It reasons to be cheerful. These are all reasons to be cheerful.

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And then, finally, looking at sort of what's next for our team, but not for a team or group I suppose.

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So in terms of the group itself, we are actually doing this at the moment, we're doing some process mapping, so I think it's probably quite clear from the start the conversation.

38:08

Start the presentation that we we were sort of

38:15

wanting at the start to really get ahead of these deals. But when they first came in, it was just about keeping, keeping up, and making sure we were reacting in a timely fashion while we

tried to get all sorts of old selves organized into a better way of doing things. So we never really did any sort of look into our processes.

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You know, where are the pinch points, are we being as efficient as possible. So we're doing, we're doing that currently.

38:45

Then another thing, which I think as the renewals are coming in is probably something more and more we want to really dig into a bit more is the analytics. Reviewing successes of TAs, are they working for us? Now we've got sort of an evidence base for them doing some expectation of licenses and licensing and then doing this sort of stuff, so sharing best practice with the sector.

39:14

Yeah. Absolutely.

39:16

So I think probably a little bit then about that, some of the things we have been doing, the innovation in block ram, recharging.

39:24

So one of the things that we are looking to do is to secure some level of long-term funding which is beyond the periodicals budget. Our colleagues, Lucy, and Ishia have had great success in identifying items that can be recharged. So that's been something new that we've been doing from which we then been able to re-invest in other agreements, which is, yeah, again, presents other challenges, because then you have to think about how you will sustain that, the long term, without block grants.

39:54

Just, as we said, managing existing in ETA's you are, I mean, we are fortunate in the sense that we have, like, a fairly large number of staff that are available to do this. But, as Julie has also said, it's not our first job. It's certainly not anything I'd managed before and kind of.

40:17

I think there is a sort of yeah, there is like a realistic threshold as to how many things you can do because or at least you can I mean, you could sign up to as many as you want. But if you want them to be effective and you want them to be kind of like workable and really deliver the things that you're looking for, you will need to have this kind of awareness of ongoing, and maintenance, and, and, and, and review processes to ensure that you are getting these value for money things.

40:47

And finally, yes, We would like to look at some other agreements, but I think probably capacity levels at the moment, indicate that we're not going to be doing that. So, one of the advantages of the Jisc approach is, of course, it provides you with standardized documentation. It provides you with standardized terms licenses, So all these things, make your job hack for standardized language as well. You know, you've got, basically, like, standard terms that you're using. So that there is, like shared, understanding what it is, You're, you know, the more you step outside of that, and the more you go off, it's, it's less likely that those things are going to be in place. So, it would be potentially a lot more work with it. Just depends. So, I think, probably realistically.

41:31

Yeah, you would need to be very, you need to go in with eyes open, and possibly, be aware that you would need to do work in other areas that you wouldn't normally day, is what I would say.

41:42

Um, yes, So, yeah, all those things challenges, those sustainability challenges.

41:48

Um, then, whilst we do feel, we are getting up to our threshold, we're also always feeling like we want to work on improving the TAs that we do have. So, making sure that there's feedback going back and forth between us and publishers, so improving publisher, dashboards, improvement data, we are getting off publishers.

42:13

That's really important. We'd like to look into wide disciplinary range of TAs. We have, again, just to make sure we're meeting the the university's needs.

42:24

And, again, where necessary, looking at getting more sectoral and institutional input into things. So for instance, with the Elsevier Agreement, we had a separate group. We had a university sort of level group, which really helped us because we're feeding back and forth from our group into that group.

42:44

But it was such a big agreement that we really felt that it needed, that wider input from the institution.

42:53

And then there are sort of more.

42:57

Future gazing things around, you know, where are we with true transitional agreements, all the other types of content that this might spread into? So, monographs that, discussions.

43:09

So yeah, there's, there's, uh, an interesting future, as well, as, as well as an interesting present.

43:18

And that's it, thank you for listening.

43:21

I'm really sorry, we weren't able to get the the subtitles up, but I think there will be a transcript coming around, so I hope that's That's OK.

43:32

Yes, thank you.

43:36

Thank you very much Julie and Paul for for being so open about your experiences. And although these the schedule says that the break should start. I think there's some really interesting questions.

43:48

So if it's OK with everybody, just sneak or grab a few minutes from the break to at least have some questions for this session. And the first one I would like to read out loud is from Joe, and that's have, you found any TAs, that you have had to cancel due to low usage or value for money.

44:11

Yes, there is one that we're considering where there was a very small level of publishing that didn't, uh, think it was like one article was published. There's a comparatively low level.

44:26

And I think we just need to go back in and check and what we would do there is basically review the costs versus say is is the cost of say for example, a single APC worth the equivalent of the publishing costs and and if the answer is no, if it's over £3000 or something like that, then we would probably look at just going back to a read only option for that.

44:52

Thank you. And Matt, put in a question is, how do you deal with a read and publish which specifies a cap in article numbers?

45:02

I think you did mention it somewhere in the presentation, but this is more direct question, I suppose.

45:10

Yes. So we don't have a huge amount of capped deals.

45:18

I'm thinking of a couple.

45:19

We do have Taylor and Francis have a cap, but we are we never, I don't think we've ever come close. Wiley is obviously the big one that we hit the year before last.

45:32

Now, I think I think we did hit it towards November last year.

45:41

With that one, in particular, with our Wiley account, we, we had a bit of we have some money left over in a, what was called a credit account, from, like, it was a, I guess, a historic.

45:57

It's a historic pot of money that, that we happened to have.

46:01

So, we we were able to use a little bit of that money. But we did, we did restrict it, so.

46:11

We would only from that money, we would only allow for fully gold open access journals.

46:17

So, No, OK, occasionally we, we do have to make these sort of hard decisions, But it was in that sense that the amount of money we had left in that small, little account, If we, we worked out the If we supported gold only, that could cover the rest of if this happened every year. So we were, again, it was making it as sustainable as possible.

46:42

Again, it's not supporting where we want think the direction of travel to go in. Yeah, I think it's the prioritizing, you ran the equivalent figures to work out, what it would pay and then?

46:56

I think I would say the the other problem with the Wiley one as well, and that's a really good example of a of a publisher to changing the rules mid agreements and really kind of like.

47:11

Yeah, originally, there wasn't going to be a cap. We push that really hard on that, but, unfortunately, that was not much. I think, that would need some kind of separate response. And Jisc is very good for co-ordinating those things.

47:21

But even then, with people like Wiley, whether it's just large amounts of publishing, it's really hard to kind of like forced them into that position. And it does need, I think what we're seeing with Elsevier is like it's like the way to go with these kinds of agreements.

47:34

That sector wide kind of kind of push it's the only way.

47:40

But but the flip of that is also, I would say, one of our closest relationships with people at Wiley, because, because we have to have some sort of ongoing dialog.

47:55

Thank you very much I Well, I took five minutes off the break, but thank you very much for answering these questions. There were some more questions, So we'll definitely, we'll share them with you.

48:06

And I'm handing over to the Chair of the day, Nathan.

48:14

thank you very much. Thank you.

48:18

Thank you for the presentations I have learn't a few things about your Approach to Transitional agreements.

48:26

Now we are scheduled for a break, are we still going to take the full 20 mins or are we going to resume at the original time

48:39

It's still early. Make it make it the original time. So, five minutes for the break, but I suppose that's OK.

48:47

OK.

48:50

48:58

20 minutes, OK, thank you, everyone. Thank you.

49:47

Welcome you back to seminar this morning and hopefully you had a good break and a few minutes away from the screen, and also some refreshments as well.

49:58

Next presentation is driven by Andrew Tattersall from the University of Sheffield and is going to talk about Altmetrics and

50:07

cases of scholarly interests and tell us about citation, impact

50:15

Thank you and I think can you hear me OK?

50:29

Yes, thank you. I'll just share my screen.

50:38

let me just OK to share my screen, so can you just kind of just check that you can see my screen, OK?

50:49

The presentation screen.

50:52

Brilliant, thank you. Good morning, everyone. I hope you're OK.

50:57

Well, hope you keeping warm.

50:58

I'm in a very cold conservatory right now. I hope you're all well, and welcome to where my talk that's my details on the page there. You will see like many people I've also moved on to a mastodon straddling between mastodon on Twitter. Right now. I'm going to talk about Altmetric, which I'm sure many of you will know about, will have some idea about altmetrics, or something that you kind of would like to know more about or have dipped your toe into.

51:31

I wrote one of the first books, or certainly co-edited a large part of one of the first books or altmetrics in 2016.

51:39

I got into almetrics, probably around 20 11 to 20 12 after the term first appeared in 2010. And it seemed to fit with the kind of things that I was interested in, in terms of scholarly communications, and sort of capturing how research was being communicated, because, at the time, and still am doing a lot of work around research, communication, and dissemination.

52:05

So, I wanted to try and get some sort of meaning as to what altmetrics really were.

52:13

For those people who perhaps have some idea altmetrics, or, or, or have a little bit cautious about them, as we should do with all metrics, we should treat all metrics with some degree of criticism.

52:27

We shouldn't accept them on face value, they are very useful metrics, but they're not without the problems.

52:36

I think many of us would agree, When altmetrics first appeared because of the term alt, as an alternative.

52:43

People, naturally, particularly in the sort of, I would say, the more old school academic sphere, whether that was publishing or

52:52

As researchers, librarians felt that this was something that was going to come and try and usurp and try and remove the the the impact factor score, the citation score, the H index. And it wasn't it was always about complementary metrics.

53:10

It was always about having metrics that were there to tell us things that we didn't know, And altmetrics does this very well. It tells a lot of stuff that we don't know that we didn't know before search, purely that complement is not there to replace traditional metrics. It does something very different from such as journal impact factor score. And it does things very different from citations, again, as I say, non without their problems. And their criticisms are I think we would all agree there's no for in academia and in particularly in terms of measurement that we would like to do better.

53:49

But, what they're there for is to help people understand how that research is being received, and used and by whom.

53:56

And a lot of that was because, and I'm sure some of you will know this, I'm probably teaching some of your to suck eggs

54:01

But we didn't always know who was engaging in our research.

54:05

We didn't know how they were receiving it, and we're not just talking about fellow academics or publishers were talking about members of the public, we're talking about local and national government.

54:17

We're talking about policy makers, et cetera, altmetrics, are not indicate an indicator of quality. You know, altmetrics dot com, which is the icon, you'll notice in the top left-hand corner, with the donuts, they have an altmetrics score, and the other top corner, you will see the Plum analytics, badge

54:39

Bottom left is Impact Factors, icon, and then in the bottom, bottom right is Overton.

54:46

So altmetrics very much has this score, which is, I wouldn't say it's a focus, but it's certainly something that's hard to ignore in the same way that you used to TripAdvisor reviews it, and et cetera. You can still make your own decisions.

55:00

But there are there to give you some kind of guidance.

55:04

But it's not an indicator of quality or having a massive altmetrics score, isn't necessarily an indicator of quality.

55:11

Those of you will remember Andrew Wakefield, MMR, Vaccine paper that was published in the Lancet because it was published in the Lancet. That's an indicator of quality because he got lots of citations that backed up that quality but actually it was not a very good piece of research.

55:27

So we know that that can be problems with things like that, But what it can do is, it can show, provide, provide further evidence of engagement than societal impact and that's increasingly important for academics as part of the wrath and impact case studies.

55:44

And it's something that, that certain people are getting certainly more and more interested in.

55:51

And academics, particularly so, but it's also about giving credit for research that is, other than just journal articles because altmetrics track a multitude of different identifiers. And that is, that's the kind of the difference here.

56:08

Primarily to, prior to this, we were looking at journals, and we look in academics. And we're looking at research papers. And now, we can look at gray literature. We can look at data sets, we can look at clinical trials, as long as it's got some kind of identifier that allows us to actually track it.

56:28

And this tweet, from 20 14, I think, was, was pretty much captured.

56:35

The essence of of what altmetrics kind of identifies by Matt Shirley, as a researcher who tweeted in 20 14, the altmetrics Wiley altmetrics launched demonstrates the low impact of my wiley article. At least I know!

56:52

So, I've no doubt when he looked's article on altmetrics, he had a very low score, or possibly as zero, possibly lower than 10.

57:01

So, he was, he was there thinking, Right, OK, there's a low impact. At least, I know.

57:06

There's things that I can do about that.

57:10

I wrote this article for the LSC in 20 16. 0, is the magic number.

57:16

And what I tried to highlight is the fact that small numbers, when we're looking altmetrics, matter, just as much as large ones, because unlike journals, citations, etcetera, and things like that and an impact factor scores. Altmetrics are very, very instantaneous. They're quite real time.

57:37

We get some instant feedback, which we don't get on citations. Citations are very slow to accrue. The all of the kind of citations can take many years. Altmetrics can take just months before they kind of crashed down where the attention is that early on.

57:52

So, when you've got research that's got an altmetrics score of zero, or one, or two, perhaps just got a few tweets, then it highlights potential issues relating to the kind of potential impacts of that research. Whether there's a pathway to creating impact for that research and whether that research has been communicated well.

58:16

And some of you might know, I do consultancy in research communications.

58:22

I train lots of people and do lots of workshops on disseminating research, blogging, infographics, podcasting, et cetera.

58:30

Do all of this hands-on, and I've got kind of a background in journalism, etcetera.

58:36

So, My, My sort of belief is, In the dissemination of research and altmetrics, is that feedback loop part of this? And here's a quote. An old quote from Professor Patrick Dunleavy at the LSE.

58:48

He says that, Yeah, if you're not online to the kind of places I review below, then you are for all intents and purposes in the modern, digital world, not an active academic.

58:58

In my view, it's not just advisable to do this kind of thing. It should be effectively mandatory part and parcel of the obligations that go, go withholding, any academic or research job. Scholarship and science must be public

59:10

and researchers need to seek, maximize the reach and accessibility of their work to relevant audiences in any way they can.

59:18

Now I'm not fundamentalist that because I appreciate that not all academics want to do this, nor should they be forced. You shouldn't be forcing people to be in front of a microphone and do something for the media, writing, good blog post. If it's out of their comfort zone. If they, if they've got anxiety about that, they just don't want to appear public than they should never be forced.

59:37

I don't think that it's worth people being unhappy in their job and being forced that.

59:42

Well, it does highlight an issue that actually, if a lot of that kind of coms work isn't happening, then fall into two purposes for certain people, and certain research, it's not going to be visible, is not going to generate altmetrics. We're not going to find out about this research, now it will appear in journals obviously.

1:00:05

Well, it will appear in reports, which is obviously the primary process for research to make some kind of impact for whoever the funder is, etcetera.

1:00:17

There is all these kind of nice, fringe benefits that come as a result of research for getting gaining more collaborations through being invited to give talks through being invited to write blog posts, to do media work, to boost in your your kind of profile and the work that you've done. Because we can't work on the premise that everyone's gonna find it. I work in health research.

1:00:40

We have information specialists, Those information specialist help research projects, find

1:00:46

the literature to support the research is very systematic. We do systematic reviews.

1:00:50

We've got probably, I don't know, a couple of dozen systematic reviewer in my department, and we are very, very to use the term, again, systematic about what we do. But what do other departments do? What do small departments do with fewer resources? How can they, how can they kind of deal with that? But there's things that can be done to make that research certainly more visible.

1:01:14

And I think the problem here is that we know we don't know how much, but we know that a lot of papers in oxide year one year, we're publishing more papers. And, and, I'd imagine the figure of those being not being cited probably is increasing As, well, it's very hard to get to say that. People have made estimates on 20% not being cited, Ever been cited This argument that certain amount of research papers are only ever read by the two peer reviewers. Or the third peer review of the editor. The department, the author, etcetera. And, of course, probably, not all papers can, be cited, they're, not all, are worth cited. And it can depend on discipline. Some disciplines are going to get more citations than others. It's not all equal.

1:01:59

But if you are getting this zero altmetric, this kind of this, no altmetrics coming back, it's probably also because papers are not being communicated.

1:02:11

They're not being shared, they're not being disseminated, or they're being disseminated and communicated very poorly, in that people are not including deer wise. They're not included in PubMed ID. They're not including any kind of identifier to that research, and that can be in any part of that process, and I'm not just talking about Twitter etcetera.

1:02:34

Alt metric and other platforms will text mine.

1:02:37

They will text mine to try and find where there are mentions. But that's not, That's not 100% going to find everything. So, a lot of it comes back to having that kind of good practice when you're disseminating research.

1:02:54

The good news is that altmetrics scores can only go up.

1:02:56

But, again, it's about making the research visible and accessible if it's, if it's hidden, if it's locked away, If it's not being communicated, if there's, if there's no kind of identifies being added, then it makes all of that, trying to get those steps a little bit harder.

1:03:16

I think it's a good example, so here is a piece of research that was published in 2010 that was still paywall on Elsevier, but an author's version, Open Access version was available on my university's white Rose Research online repository. Which is a collaboration between the University of York Leeds and Sheffield Now this research achieved some attention at the start of Lockdown.

1:03:46

Was paid well then here's the, here's the Altmetrics, picked up by nine, by seven news outlets by four blogs. Had a couple of tweets gotten.

1:03:56

Obviously, various citations, et cetera, which you probably had accrued mostly before this, but it received this media attention through the actual white Rose version.

1:04:08

Here it is, there's the, there's the white rose, there's the statistics for it.

1:04:12

And this article itself, the actual White Rose Record, as opposed to the paywall version, was featured in various news articles so at the Start of Lockdown.

1:04:24

Obviously, people found themselves at home. Lot of people not in a very good environment to work from home, a lot of noise. A lot of kind of disruption trying to find a good space to focus and do work, especially if you've got work that you really need to focus on.

1:04:39

And so these articles start to appear these sort of lifestyle, Covid lifestyle articles and here's one on how to make your house and garden more tranquil.

1:04:48

Tips from an acoustic expert and in this article in the conversation which was re published on Yahoo News and I think it reappeared in the Metro.

1:04:58

And actually links back to this here, links back to this particular record because this was the one that was accessible. So, that is, that is that as a positive thing? That.

1:05:13

Policy is really important. It's something I don't think most academics really think about.

1:05:19

I think that's, that's a real missed opportunity.

1:05:24

So, um, if anyone's ever watched top gear, there's the bit where they used to do the bit where people used to drive around a track in a reasonably priced car. And they'd have various celebrities come on and they'd have to drive this car. They always said that there is pretended not to be interested in what, how fast they gone round.

1:05:44

The minute that they got to read the time, the person always sat on the edge of the chair, the celebrity, because they really did want to know what time they'd gone around it. And, it's the same thing. That policy can be a bit dry.

1:05:56

Can be a bit dull to some people, would actually, when you start to tell some academics, they'd been started in policy, they will take interest, they'll start to go, really. You know, you know, using things like overturned and altmetrics, being able to produce this amine overturn which was which was kind of started by ... who started alt metric dot com. Looks primarily at policy as well as other kinds of outputs.

1:06:24

But, it is interesting to know that you're being cited in policy.

1:06:28

It is something that's potential impact on an e-mail.

1:06:31

Went around from my Director of Research early today, asking people for where they felt they had been, possibly made an impact with the research for the kind of impact case studies. I e-mailed and said, Well, do you think this is really going to include policy? You know, should we say something about this?

1:06:50

She said, Oh, yes, please, kind of e-mail my department, which is around 320 staff, to ask them, you know, to, to have a look at dimensions and have a look at alt metric and and to overton to see whether researchers.

1:07:06

Because, invariably, if they've published anything 5, 5 or so papers, they've probably been cited in policy.

1:07:14

And they will be. A lot of academics will be interested in that.

1:07:18

But, again, issues about this.

1:07:22

That, when you get these kind of reports whether its in overton or altmetric that you say, oh, you've been cited in 20 policy documents. It's very easy to suddenly shut down your computer and golf this been cited within 20 policy documents.

1:07:35

Then the question here is, have you really have you been cited in 10 policy documents? And there's just ten of the same, that's in a different language. If you imagine if there's some policy that comes out in Wales, it's probably going to be published in English and Welsh. Is it going to be an executive summary?

1:07:51

And are there various, other versions, if it's a European piece of work? An EU piece of work?

1:07:57

Again, is it the same piece of policy that's just been published in on the language? And now, we have to remember that that is also research that's got policy that's impacting a lot of countries. So that's really good.

1:08:09

But we also have to, it's sort of like, sometimes not treat this content at face value in the same way that the academics will go, and they tell us, go, you know what? My H index and, you know, you say, look at Scopus. Look at web of science. Look at Google Scholar and all these things and yeah.

1:08:27

It's a get the choice that always pick Google Scholar because it inflates that kind of H index it a little bit more, because it brings in a lot, a lot of stuff that the other databases don't.

1:08:39

So I did a piece of research which was cited on here this piece here, what can alt metric tell us about policy, citations of research.

1:08:46

We looked at the University of Sheffield articles at University of Sheffield, publish this into Frontiers nearly five years ago.

1:08:56

And we found 1463 pieces of research cited in at least one policy document, that number's far greater now an overton actually produces a far, far bigger number.

1:09:08

If we, if we'd had access to overton existed in 2018, which I think it did, but it would have produced a lot more because they all focused a lot more on policy.

1:09:17

So I think the figure now is probably 10 times that, we found that 92 of these 1400 pieces of work have been cited in three or more policy documents.

1:09:29

And interestingly, we found the longest time lag from something being published as a journal article to policy was 31 years, which is obviously an incredible long period but that's brilliant. It shows us that really, altmetrics is quite short tail of engagement, largely, particularly if you're looking at tweets and news and blogs.

1:09:50

But if we're looking at things like policy, or even Wikipedia and stuff like that, then we could see quite a long way down.

1:09:58

Interestingly, the shortest period from an article being published to being cited in policy, it was three months.

1:10:06

So that was a pretty quick turnaround for that policy document, or it was the last addition to that document.

1:10:12

What we did find numerous errors in the data, A lot of that isn't necessarily kind of the fault of the altmetrics systems. They are often faults of publication systems. There are errors in Publication systems. You know, if you go to Scopus You know, you look for an author. You might find different Variations are no need merging and Scopus is really good at doing. that, you know, work to try to, you know, tidying author records. So there are errors there.

1:10:42

We get various errors where it brings in articles that he claims is affiliated to the Sheffield in New York City. Find all the authors actually come from somewhere overseas.

1:10:55

But also now, quite interestingly, particularly in the US, but we're all seeing clinical trials being cited and being tracked again. So, here's a story that was picked up in The Independent, anti vax is Target 12 to 15 year old recovered misinformation leaflets, hoping to create fear over a vaccine.

1:11:14

So, that news article, in the, In the Independent, in the iNews actually cited that clinical trial record in the news story, which is, you know, this is really, really cool.

1:11:27

Actually, for people who want to kind of dig a bit further, then, this is really interesting for researchers working on that clinical trial.

1:11:36

That would be very interesting to know that your clinical trial is being picked up in altmetrics. And, again, it comes back to this thing.

1:11:44

Academics might say, well, some, some of them will, but, some might say, well, this isn't really interesting.

1:11:49

But you should actually, your clinical trial has been cited in a new story.

1:11:54

I think this is I think this is really interesting Also, with things like Alt metric dot com, one of the issues that researchers have when they wanted to disseminate research is Where do they publish their research? Where do they disseminate it? So, a lot of people are still writing blog posts. I don't feel blogs have died out. You often hear people say, well, surely. It's all podcast now. Blogspot these horses for courses really, Blogs are still really very, very useful, very, very impactful. And if you've published a piece of research and you're thinking, I want to disseminate elsewhere, then Altmetrics can tell you this again. It's going beyond the numbers.

1:12:33

It's telling you something else that you could go in, search for a particular topic, or search for a very influential piece of research, and see where it's been picked up, and where it's been blocked. That gives you an indication of potential blocked sites to go and submit something to. And here's one article here which had been picked up by three blogs.

1:12:55

So again, if you want to sort of have a lot you've got the impact of social sciences there. And you've got the Social Science sphere as a potential. And those Chris Sampson's, although it says remove Chris Sampson's

1:13:09

Journal Roundup, which I think is the Health Economist Blog that Chris Sampson runs. So again, here is that article Research of Policy and Impact Trials published by UK National Institute of Health Research. This is a paper that I wrote with Chris Carroll for Journal Value in Health. It's got three blog mentions. So, we can see where it's been blog, anyone who's doing anything around health policy, and wants to find somewhere where they could potentially disseminate it altmetrics can tell us that.

1:13:43

Something that I've kind of been working off the last two years and I really need to finish off. It's a paper that's about 90% done, 85% done. So I looked at UK, local, and national media coverage of research using altmetrics.

1:13:57

Because I had my hypothesis, the media don't particularly do a perfect job, they do a good job of disseminating our research and citing sites but they don't do a perfect job. A lot of things are missing. So often.

1:14:12

I was getting very irked or by seeing stories in International Newspapers, Daily Mail, you know, kind of sort of like the express, anything like that. Researchers have found

1:14:24

Researchers have found this. Who were the researchers? Where are they from? What they found can actually look at what they found have they cited the paper is it in there.

1:14:34

So we looked at a sample of University of Sheffield Research on altmetrics, and we found looking at national media, that 84% of our sample was, was fairly small, 271. But we found that 230, 84, 85% linked to the paper.

1:14:53

Which was which was good. That's positive.

1:14:55

But in terms of local media, that was really low, 7.6% link to research paper on the local media.

1:15:05

I think a lot of that it's because local media is very syndicated, it's the same story re-appear. So if its badly done in one part, probably badly done elsewhere in the system.

1:15:13

And also they get a lot of that news from the Press Association, News Wire, So things are going out with information missing. It will continue to be so.

1:15:25

We found that national media they cited just under 40% of authors, and Sheffield authors, but again, Sheffield may not be leading that research. So it might be about a different academic.

1:15:37

What we found that in over half the cases, there was no author cited.

1:15:42

So, again, do we need to do that better? And we had a UK SG webinar started this year that I co-chaired at, that looked at this issue. And hopefully, we'll have another one, Some point next year, to look at the issue about how do publishes, how do media, experts, academics, and librarians, work better with the media in terms of dissemination?

1:16:05

Also, local media, the author was predominantly recited compared to the national media. Again, really interesting. So does that show that authors are mentioned in press releases and that picked up and then re published? So again, very different from the other.

1:16:23

Terms of national media, we found a third, were the journals recited in national media whereas in local media it was nearly 90%.

1:16:32

So kind of sort of considerable difference there. Funders very rarely mentioned international media and they were mentioned in just over fifth in local media and again they may not be a funder tied to that particular piece of research that paper come out, they might be non funded.

1:16:50

It might be, there might be a variety of reasons as to why funder isn't mentioned, but it goes back to how stories are disseminated, and really it's about understanding the life cycle of a research story. And this is really important for altmetrics.

1:17:06

This is a very important aspect, is not just about producing some research, and then just looking at, looking at the altmetrics score on plumb or alt metric dot com. He's thinking about where just research starts in terms of how when something is published.

1:17:22

Where it starts life is probably the press release from a research organization.

1:17:26

media team, a funder, a journal, then it's hopefully picked up by news agency in this country. We've got the Press Association, who I used to work for 20 odd years ago, or picked up by a local newspaper or national newspaper.

1:17:39

And then they get invariably will get published on the syndication and partner sites. Particularly things effect upon the PR Newswire. So, there'll be picked upon picked by local news agencies.

1:17:52

It will then publish across the many, many news sites, and then things have picked up and re blogs on research, especially into sites. If you see back earlier, the article that was published on the conversation, that was a blog post, which then became a new story on the independent and became a news story on the metro. And again, if there's things missing in that, they'll miss further on, over the conversation is quite a good place to start. And all of this is shared on social media.

1:18:18

So, if any bits are missing is part of that cycle, and if things like a DOI any pieces that are really integral to being picked up by altmetrics, then it's going to get missed down the actual life cycle.

1:18:35

So the first action is important to include, where possible authors, funders

1:18:39

DOI's, URLs organizations, because journalists are very busy, academic's, Very busy. Everyone's very busy.

1:18:49

Not all Journalists studios, you know, journeys are going to journalists are going to go inside a clinical trial. Not all journalists are people like George Monbiot, who will actually link academic papers in some of his news articles on The Guardian. The Guardian doesn't always get it all right.

1:19:05

So, if these things are missing, then everything else, further on will also miss out.

1:19:15

So, I think im at time, I think I'm supposed to finish it to 25 to you, but we're five minutes late, so it's 22.

1:19:21

There's a QR code there, which hopefully should work that will take you to a copy of the slides which are on Slideshare already, if anyone wants to review, there won't have all the fancy graphics I'm afraid

1:19:34

I hope that's been of interest to you.

1:19:39

Andy, thank you very, very much.

1:19:41

That was great I always loved those presentations.

1:19:45

Although we're running a little late, I think that's time for one question. Do you think that the open access developments also push researchers to share their academic work more widely on social networks?

1:20:00

Yeah, absolutely. I think that's part of this.

1:20:04

Probably a few things that, this part of the ecosystem of researchers who are feeling now empowered to do things more openly, because before they were very cautious, kinda do this. Academics, my experience dealing with academics is an awful lot.

1:20:19

Quite insecure imposter syndrome and things like that, all play a part of it. So, they, I think, that they're often very cautious, and they're very nervous as to what they can do.

1:20:29

They're worried about stepping on toes, if they're doing things as part of collaborations, they're worried about certain things but, that said as well. They will break copyright, as well.

1:20:40

There's a cognitive dissonance probably, but I think the openness has, has helped this.

1:20:47

Because it's given research's a bit more confidence to share things because, you know, I've seen things, people shut down in the past where they've shared things on social media. And someone's gone can't read it, it's paywall.

1:21:01

Yeah, you suddenly feel a bit embarrassed about that.

1:21:04

It's particularly bad, when the research is about open access and its paywalled. And then someone gets shut down about it, I've seen it for awhile. But I think the openness has really helped to go with this.

1:21:19

Well, thank you very, very much. Undoubtedly, we'll hear and see more of you. Again. And now I'm handing over to Nathan to introduce the next speaker.

1:21:34

Thank you, Anja. And thank you to Andrew for a good informed presentation.

1:21:40

Next speaker is Laura Wong who works for Jisc who's project manager.

1:21:46

Jusp, she's talking about the role of Jusp in gathering usage statistics, and informing decision making.

1:21:55

So I will hand over now to Laura

1:22:01

Thank you.

1:22:03

Can you hear me OK?

1:22:07

Yes. Yes. Yes, OK, good.

1:22:09

Let's just fine. All right screen.

1:22:15

OK, it's up.

1:22:20

OK, so I think about captions working. And that gets go and hopefully, if it should say, I see my full slides moment, OK, So and as I said, my name's Laura Wong and I am one of the product managers at Jisc, I work on teo counter Base you Statistics Services Iris, which is for institutional repository usage and JUSP, which I'm going to be talking about today.

1:22:44

And I sit within the licensing intelligence and Analytics team, just a Jisc.

1:22:49

And so, I focused on and usage stats, But I'm I sit within a wide team that focuses on analysis more broadly. Today, I'm going to be talking about just throw in supporting libraries and gathering usage stats and informing decision making.

1:23:06

So just to give you a brief overview of what I'll cover for those of you who are not familiar with, just, I'm going to give a quick overview, what it is, how it works, and what it doesn't, doesn't cover, then.

1:23:16

I'll move on to sharing some of the, and before outputs, and at the end, I will briefly, and speak a bit about what Scott's going on with usage stats that open access.

1:23:28

I'm not going to be covering coming into any details about counsellor metric types of reports day by day and Tasha, and Rosie covered off, really well yesterday, this isn't gonna be a demo either Instead of going to be focusing on giving you some examples of useful report outputs and how they might relate to decision making.

1:23:50

So, what you just said, just is a surface that collects County East Reports on behalf of libraries, and then pulls it all together in one place.

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It started as the journal usage statistics portal, and, but since expanded to cover by books, database, and platforms as well.

1:24:06

It was initially aimed at just men, the universities in the UK, with a focus on supporting just negotiate agreements. We then moved out and started working with other platforms, and publishers outside Jisc and, and then we also sort of expanded to cover further education research organizations.

1:24:24

And then we also have a at a few end customers outside the UK as well, OK.

1:24:34

Suggest, supports librarians by.

1:24:36

and providing a single point of access to usage data.

1:24:41

And, sorry.

1:24:43

Yes?

1:24:46

Think ... state from a range of surprise and publishers, and so we are reducing the burden of data collection and ..., so that libraries can focus more on the reporting and the analysis.

1:25:00

So, we currently collect usage data for over 100 suppliers and platforms. We do this on a monthly basis using something called sushi, and so so she isn't automated isn't a standardized protocol and for transferring uses data.

1:25:16

So, we have a semi automated process, and so, each month, we check when the reports are available. And this could be at any point during the month.

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And as part of this process, we then carry out Faris checks on their ports.

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And in this way, we also added a layer of and quantity assurance to that data.

1:25:34

So, if we detect any issues really guys with the publisher and get themselves, divers can then access the reports via an online portal. And I'll be showing you some excellent examples of the Report app, that shortly.

1:25:46

There's also an option to get reports, lift your inbox each month. And so, some librarians like to have a reminder that the reports are available, or just get high level summary. And there's also the option to automate the harvest of the reports into Library Management System. So, you can pull it in 20 11.

1:26:06

There's also a lot of ongoing maintenance we do with the dataset.

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So, if, for whatever reason, a supply of real estate so replaces data, we then go back and be harvested

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As mentioned, if we come across any issues or libraries have any data queries, we can then be used with the publisher to get resolved. as usually some gaps, we need to fail. So, for example, a publisher might be couch compliant with the platform reports, for example, and later then and we might add the title reports once any issues have been resolved.

1:26:39

There also was seems to be at least one publisher in the process of transitioning to a new platform and so we liaise with them to get things like credentials and ensure a smooth transition.

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And then this way, we can give her lots of continuity and to the set to the service.

1:27:00

So, how does it just help libraries? Well, firstly, as a ..., it's really useful putting together and stats for regular reporting. It's also widely used for evaluating packages, collections, and individual purchase, as well as helping get a better understanding of an E resource usage in general.

1:27:19

Following on from this, obviously, then it can help inform collection management decisions. So, this can be renewals, cancellations purchase, and but also thinking more broadly or, and more strategically, thinking about your collection management strategies, or any tactics you might want to use.

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And it's also being used for demonstrating value and impact, so that's buy for the resources, and also the value and impact of libraries.

1:27:44

As I said, today, I'm going to be focusing on examples around informing decision making.

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Before we go onto the examples, I just wanted to note a few things about what jusp doesn't cover us. We get asked this a lot.

1:28:01

So jusp doesn't hold any cost information, and we don't tend to do any cost per use calculation. We hold the data, quality issue, data type is kinda collect that data, and then merge it with other other data sources within their own systems. We only work with counts complaint reports, and this is really important to us, because we need to have standardized support so we can work at scale for working cosmos for publishers, and they all need to be in a similar format, so we can aggregate them together, and it also makes and allows us to have economies of scale as well.

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And so we've really careful about when we receive reports. And so when we start collecting reports, and we run it through the validation tool with counts of annotation tool to that check, they are all in order and miss of any issues.

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And as we only work with and counts reports, we don't have any that any additional information and pipe. But the publisher, say, for example, we don't have includes any subject information, because, obviously, the publisher will classify that slightly differently. And we also don't cover anything about who is viewing the content, because that's not covered, and counts reports. Also means we don't have any and data protection consents that.

1:29:11

So just be very focused on the collecting and aggregating of quality issue data, and then we provide the tools for you to get the data out easily and conveniently.

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OK, so moving on to the examples, I have grouped these into 4, 3, sorry, decision making things, say what to keep, where to invest, and when two axe.

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Before I go on, to show you the examples, I also just want to note that all the data I'm showing is demonstration data. And so please don't read anything into the numbers. These are just for illustrative purposes.

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OK, so starting with what's Cape, so this covers things like and subscription site journals, books, databases. And but it can also be used to inform what you might want to keep on a curated list, for example. So you might have a web page and a collection of articles or subjects or databases or reading list, and you might want to evaluate whether you want to keep that particular item or database on that list.

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In the past, an exit stat has also been used for informing decisions about what's keeping physical collections as well and I think that's probably less relevant now.

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And in these examples, I'm going to focus on the journal renewals and that's the most common example.

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OK, so there are several reports in just that can support journal subscription renewal decisions, as they say firstly there's the TRG one gen request, excluding gold open, access. This is the go-to report or stand for you. And what you're going directly to a puppet show your ... via just and this is very standardized report.

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In the example I'm showing you on the screen here, it's I re-arrange version of that fee. So, we've got the same stats with eight with different layouts. I just want to highlight a couple of features here.

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So, firstly, at the top, we've got the summary table, and so this gives you a quick and overview or summary of the total usage for this particular publisher. There is the option to explore as a CSV or

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Also, when you go to run the report, is also get spreadsheet and button. And so, if you want to Boston viewing this report on screen, you can also just download it straight away.

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In this example, and I've presented, there are two metric types, and one in each column. So, in an almost standard view, you would have all the months showing here. And the way I've selected it is so that you have the title in those columns.

1:31:46

So usually, when you're looking at minnows and often, libraries are only really interested in the annual totals. And we know that some libraries like to capture both metric types. So, sometimes, for historical purposes, they won't the total item requests for that continuity. And, but they also want to retain, have a look at the unique lyceum classes.

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It's more accurate way of assessing crosspiece, for example.

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And, because they, they're, that will separate columns, you can also sort them if you wish.

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So, the TRG one is great for getting an a quick overview and if those metrics, those metrics and those counts, let's say you want to be a bit more accurate in your chosen measure. And so, you only want to include asked cause and usage of obstacles covered by your subscription. This is sometimes called front for usage.

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In other words, you want to exclude and the bat file, which isn't done automatically in the TRG one.

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There is another side, if you can use so, there's the TR J for which K T of publication. And if he wants to use that and report, you would then need to actually an Excel sum up the relevant, yes. Or what I've done here is use a filter title report. So as Tushar mentioned yesterday, the main accounts reports are really flexible, they have so much data in them and you can fill them in lots of different ways.

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So, in the example I've given here, what I've done is I've filtered it so that it includes articles published from 19 95 onwards.

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And so you can't see them, gave you a breakdown here, and but you can be sure that what we've done is we've just added up those years. So that's a really quick and easy way of getting that information out.

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Obviously, if you had a different publisher, you probably have a different kind of start date for that.

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So, say you've now identified and some titles that might be think of like full bang or you just bought something that looks a bit odd. And you want to investigate further.

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At one point you can look at is the Individual Title reports. So, this allows you to take really taste, look and drill into one title in particular. So here you can view all the stats associated with a title in one place. So, you can look at the usage trends I V over the whole over a couple of years, is it going opposite going down and since they are going on.

1:34:13

And you can also have a look at the Access denials and the usage in the same place, so this can be quite useful in identifying might be a proper domain access.

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So you and we have seen it before, where you will see that the ... have really gone up and the usage is gone down and and that's actually indicating an access problem, not a demand problem. So that's and something else you want to fix. And another thing you can do with this report is and it will show you usage across multiple platforms. And so if you've got the title available on the publisher website, and may two aggregators we have got

1:34:48

here, you can then have a have to think about whether users are accessing the title in a different place, and what do you want to do about it.

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Here, I'm showing the calendar year totals, and, but you can also break it down and two months to detail, if you really want to get into that.

1:35:07

So, next, I'm going to look at where to invest. And by this, I mean and save. You're fortunate enough to have some some money set aside, and you want to look at purchasing something, taking out a subscription or you're just changing something.

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So, no license information is really useful here for identifying demand.

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So, this is where users have tried to access content for which she doesn't have a license, and you can also look at investigations as well, if that's of interest.

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So, I've just, and I should say, in all of these examples that I'm showing you, I'm just picking out examples of how you might want to configure the report and the ..., so you can configure them in various different ways. And so, in this example, I'm using the top titles report, and I've selected all surfaces. So, you can see and cross-platform. So maybe you don't you're not looking at particular puppy, she just wants to get an overview of your whole collection.

1:36:03

You can use this report to look at the top title she used as well. But for now, a pool interested in identifying where there might be additional demand.

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And another thing you might want to do with this before is, you can also, and I know it's being used to look at limit exceeded on books. And this can be helpful to understand what your current license is a sufficient, so particularly where you have a single user license, for example.

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If, for example, you're looking at purchasing that false, then you'll want to know information about the publication.

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And as I mentioned, there's a start a few of April that lashed to dig into that and you can also and outputs in the The Filter Reports at the various different ways you can slice slice this data. But in this example, I'm going to show you a summary report.

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And, as it see, really good way of showing how you might want to aggregate data.

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And so for some purposes, you may need to purchase and collection by year, rather than title level, in which case of some report by year of publication, is a better way of viewing this data. And so, hey, we've added up all of the journals and all the articles.

1:37:16

And on this platform, published Injera, she has a publication on the comparing the different match types available.

1:37:29

OK, so another area where you might want to, at the very worst stats might help when deciding whether you need to actually do anything or not. Whether you need to take action.

1:37:40

So sometimes stats can give you the confidence to not do anything, You can show that you don't actually need to make a change, in particular circumstance. At other times, it might be an indication that you need to do more patients, or and you will use to support. As I mentioned earlier, it can also be a place where you can identify with, as an accident, so an access issue that needs to be resolved.

1:38:06

I've already got a few of those examples in the other reports.

1:38:09

So, I just wanted to highlight featuring and just called usage profiling. Say within just we have a few usage profiling visualizations, and these allow just member institutions to compare their usage with similar institutions in an anonymized and high-level way.

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So, they do come with some caveats. Obviously, every every institution will have a different collection, for example.

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And, but they can be really useful in understanding why to trend. And it's also answering that question. like, is it just us say, for example, if you're seeing a sudden sharp often usage or sudden patron usage? And you're not sure whether something's changed in the publisher's website or whether this external factor involved. And we really did see this during the pandemic. We had quite a few institutions contacting us saying, our usage has gone up or are you to just gone down? and we're not sure why.

1:39:02

And we could show and easily that it's affecting every institution and usually have a reason why and usage was impacted. And so that's one common example.

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But there's lots of other cases where and for example, a publisher might have made a change on their platform, and then of course, it may also tell you that something unusual is happening with your usage. Maybe it's going up, and it's because you've done and some additional information.

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So, connection decisions aren't always about specific purchase.

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As I mentioned earlier, it might be sought to do with your longer-term cash management strategies, or it could be to do with the right tactics, and how you wanting to engage, or making decisions about which, and, but you want to invest around, for example, and open access.

1:39:54

And so sometimes you just want to see the big picture, idle trends. So, in this example, we're looking at book usage trends over time. I'm using the unique title, cracks ques, so that we allocate so it's easy to compare across platforms, and make that addition.

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And so, you can see, at the top here, we've gotten a quick summary table that allows you to sort of like SSI, get those high-level trends going. And so, this kind of data, if you are having to sort of collect it manually across and say, 50 suppliers would actually take a really long time to pull together. But then just, it just takes a few seconds.

1:40:30

Again, there's lots of different ways you can configure this report and say for example, if you wanted to look for trends in open access usage over time, And you could just change the configuration, so you're looking at, for example, journals, books, and and Select type and access only.

1:40:50

OK, so here, I've just included some links to further resources, so we've got A and a guide on choosing which reports to run. And so, those of you that are already using jusp want to, sort of get into, which reports run, we've had some common use cases and some tips on how you must do that. We've got various case studies about how other libraries, if he's just in the past, and we've got our events and training page with the recorded webinars.

1:41:20

So, and that's the main presentation, I if I just wanted to say a little bit about the open access space. And particular usage stats encounter.

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So, we see user stats are still going to be and fitting into the decision making in the AI space.

1:41:36

And Jessica is doing work in this area. So, we've heard about the tradition transitional agreements and early today. And we also have fully open access stills. And we're also working on an OA monograph as well. So, the space is definitely growing, and that's going to be more and more content available on these deals.

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And they have various different models. So, it's all not all about pay to publish.

1:42:01

There are other models, particularly in the monograph space and the workloads in a different way. And so, there's going to be lots of different ways.

1:42:08

We want to evaluate these with TAs at the moment, is very much focused on looking at and the publication metrics and understanding and what's being published that space.

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And but usage will also be really important in understanding the impact of making this content openly available, and also seeing what we're making the right trends towards and that, oh, I thought that transition to the affiliate landscape.

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And, as I mentioned, for the OA monographs face, it's likely that sen.

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People tend to look to look at and evaluate in a different way.

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And so, we definitely see this a lot of scope for usage, stats, and being very relevant as one of the many metrics to use and evaluating open access.

1:42:56

At the moment, and I will, I, for the next few months, I'm going to be working with our data analyst's eternity and to look at how we might start using uses data to feed into those.

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And those are life, away evaluations.

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On a more practical night's, we're also currently looking at including item reports into just.

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And so, this is a project that's ongoing at the moment, and this will allow, and particularly for journal articles, you can then go down to the article level and see and how it's being used, at least at an institutional level.

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And that will help us understand the challenges around these large datasets.

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Alongside that we're also going to be having discussions with libraries around and global usage stats. So, by this, I mean and Tushar was talking about yesterday, this idea of what's, how much is this particular item being used globally, not just at my institution.

1:43:55

And so, we're doing some work to explore that moment. And just to note at the moment, I am doing some interviews with just member libraries, and so it's really just been on the call here, and you want to have a chat to me about an open access and usage stats and place to get in contact.

1:44:12

OK, so, just to sum up, what is just roll in and supporting.

1:44:19

Informing decision making? And while it pulls stats together in one place, it reduces the burden of data collection and collation, and it provides a flexible tool and to support ongoing analysis and evaluation.

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Thank you for listening and I'm happy to take any questions.

1:44:37

Thank you. That was, yeah. The packed the examples you were using, I think that was extremely useful, and we definitely have some questions for you.

1:44:47

Aye.

1:44:49

Looking at the time, so I think so, far, so, good. And the first question is, Does jusp provide delivered reports that align with connell's stats submissions.

1:45:01

Yes, Is the short answer. And we have said, Yes, we have an obsession of portal and jusp that's literally for the SCONOL return.

1:45:12

OK, and then I just tried to be on schedule, again, this is going to be the second question and then we're also going to move on to the next speaker, a question from anka.

1:45:24

I sometimes see stats for the same journal repeated on jusp reports. Any idea what causes this?

1:45:33

Stats for the same journal.

1:45:35

Yeah, not off the top of my head's. If you get in contact with the help desk, we'll certainly look into those any, any, any quirks that might be happening there.

1:45:44

It's probably something coming in from the publisher. Sometimes an old and older journals, they might be multiple entries, but we need to have a look at that on a case by case basis. But do you get in contact us, We'll certainly look into it.

1:45:56

OK, OK, Anne, just squeeze in 1 1 last 1 with Open Access, which allows anyone to put the publication anywhere. Not all usage will be in the publisher's counter.

1:46:08

Do you have any plans for finding that usage elsewhere? Oh, yes. That's a really good question. Yeah, that's a really good question.

1:46:15

And say, we're very early stages. But what was he asking that question at the moment is for, I would say.

1:46:23

So say, for example, Books where we know that the content is available often may the books off to make value for multiple platforms.

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And we're working with various parties to sort of explore how each won't have that whole picture of whether he's happening multiple platforms.

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The other thing, we're looking at it.

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As I mentioned earlier, we've got an institutional repository and service as well, and we're looking to explore, and how items made available on an institutional repository, compare with and compare with. But sort of, how we can bring together sort of the institutional repository usage and the other usage.

1:47:04

We are aware of the other platforms out there.

1:47:09

So, it's just a case of working out which ones we can capture, and how much do we want to go into?

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But it's a really good question, something, we're going to have to think about how we tackle because he wants to know the wider impact of that article, not just the publisher usage.

1:47:25

Yeah, I really wanted to squeeze in that question. So, I hope that was OK with you. Nathan: So, over to you to introduce the next speaker. Thanks, ever so much, Laura. Was really good presentation.

1:47:40

Thank you.

1:47:41

And thank you, out last session today. Our speaker today is

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Andrew Knight who works at Imperial College London with a presentation Waste not want not a Timely Topic as well, I am looking forward to this presentation as well.

1:48:17

Thanks, Nathan.

1:48:20

OK, I'm just going to share my screen with you, hopefully, you can see presentation.

1:48:29

Yeah.

1:48:33

Perhaps not.

1:48:47

How's that?

1:48:48

Perfect, brilliant.

1:48:54

Yes, thank you, Nathan.

1:48:56

So, uh, so you OK to see my screen?

1:49:05

That's fine, OK. Yes, I know you're you're. You're probably looking towards the virtual buffet at this time of day.

1:49:14

But yes, I mentioned I, and I'm the acquisitions manager at Imperial College London.

1:49:20

And it says in your programs, this presentation is really about how we've addressed, what I'm going to call the inbuilt wastage of the textbook model.

1:49:30

And we do this by using usage data to help us better predict how many licenses, E textbook licenses we actually need to buy versus how many were we think we're supposed to buy, which has been the way up till now.

1:49:45

And Piero, we've been buying Textbooks and Recording Usage Stats for a number of years now, so I just want to share how we've sort of turned E textbook purchasing into more evidence based activity.

1:50:03

So, you know, first of all, we've had some questions about what issues we were looking to address. Obviously, there's a lot of issues with textbooks. But for this presentation, specifically, one thing I wanted to look at was FTE numbers.

1:50:19

For those of you who don't know, FTE numbers as full-time equivalent, that's really just the number of students on a course.

1:50:26

Libraries have traditionally used FTE numbers, simply just to determine how many E textbook licenses they need to order, for that course. But, if you think about the accuracy of FTE numbers, I mean, a few questions immediately spring to mind.

1:50:42

I'm not exactly sure where they always come from.

1:50:46

We don't always get them at the same time of year, certainly.

1:50:49

I think thereof often subject to change that they're not always accurate throughout the year. And it's important to think about those questions because, actually, the cost of textbooks is directly related to the number of FTE uses that you be ascribing to a course.

1:51:06

Imperial FTE numbers came directly from Leganto our reading lists software we think, mainly.

1:51:14

So as Lisa published during the summer, we would take the FT number and directly apply it to our textbook orders.

1:51:21

Except we didn't really know where they were coming from, who enter them into the Leganto So based on what information we didn't know whether they were finalized or indicative.

1:51:32

And to be perfectly honest, we didn't know whether the numbers we had in any way reflected how many people would turn up on the first day of term. We certainly weren't always made aware of changes subsequent to that. So, the point being, if your FTE numbers aren't accurate, you are not going to be going the right number of licenses, and we'll see later on in this presentation, what the implications of that.

1:51:54

Um, another question I had was, you know, like a lot of institutions, we were just using these, kind of best guess figures.

1:52:03

Whereas, elsewhere in the library, you know, we spend a lot of time using statistics and all sorts of different ways, really, to make sure that our funds are spent as intelligent away as possible.

1:52:14

So, when I started at Imperial nearly three years ago now, I want to see if there was a way that we could actually run an E textbook scheme using evidence, especially given that the amounts of money involved, you know these things are expensive and especially because we have this inbuilt wastage.

1:52:33

So, I guess another one. The questions are, why would we subscribe to an online model where we know there is inbuilt wastage.

1:52:41

I'm going to talk a little bit about this later, but I think, I think it's really a historic thing.

1:52:46

Buying according to FTE's, was necessary when E textbooks were initially, purchase for, you know, specific courses with a specific number of students, or at least a maximum number of students attending, but since then, the model has changed.

1:53:02

At the same time, we've developed, you know, good ways of getting hold of data that shows that buying that maximum number of titles is unnecessary. I'll show you later, what I mean by that. And we've developed data that tells you how it's much less cost effective to do that than buying according to data and evidence, and in fact the day or over time has shown time. And again the FTE numbers hardly ever correlate with usage which is a way of proving how much inbuilt wastage there is in any textbook scheme.

1:53:36

And it's that kind of evidence. I've been able to take back to suppliers and publishers and start to build negotiations around what I'm going to show you now.

1:53:46

A really good bit of evidence is the cost of those on these licenses.

1:53:53

We produce an annual report.

1:53:57

And in that report, it'll tell you how many licenses we purchased.

1:54:01

And then how many of those licenses were actually retained. And then I calculate that as a percentage.

1:54:08

We compare that with the cost of each license purchased.

1:54:11

And then we can figure out the actual cost of each user.

1:54:17

Now, in an ideal world, the number of licenses you've built would match exactly the number of licenses redeemed. Where they don't, the evidence is actually quite good way of a red flagging a tight away thing out of them. And this isn't being very well used. And we would alert subject librarian who then the I use I guess, with academic colleagues. See how come this is being used really to promote more embedded and all that kind of thing.

1:54:43

But the primary upshot of this is at the end of the year we can see how many licenses remain unredeemed and what the total cost that is to the library and is pretty eye opening as we'll see.

1:54:56

So, there's some of the issues around the inbuilt wastage of E textbooks.

1:55:01

So, what approaches have we taken to crime deal with that?

1:55:06

So, first of all, we look at usage statistics, and that's kind of the kernel of this presentation, and I promise you, I'll share it with you, so here we go.

1:55:14

Look, I'm not sure if you're about to see all of this, but this is just a small snapshot of our E textbook portfolio things from last year, anonymized.

1:55:24

So, there might be some slightly strange titles in there. I just haven't performed. I'll just run through this with you.

1:55:33

Because it's quite useful, this, this is kind of what we build. So, on the left here you have all the bibliographic data and the titles that are in kind of off cream, whatever colour that is. They wouldn't new titles for 21 2 entities. For those, we had no usage statistics, no evidence at all, they were just spoke brand-new. And those, and why? And again, this is a small fraction of what we thought they would renew. Some of, which would have had for a year, or going back to, you know, 5 or 6 years.

1:56:01

Then the next column in the report, that's in told F T That is literally the number of licenses we've bought for that one titles, Number of copies would be full. Of the column next to that, the more colourful one in talk to users is the number of actual users who have who have been in and have redeemed that license.

1:56:20

Where it's green, we're seeing either the you know it matches, or it actually exceeds the number of licenses we've purchased, where it's red. That is wastage.

1:56:31

So, that is, fewer uses that license.

1:56:35

The next section is probably for another presentation, where we drill down a little bit into the evidence, but if we move over to the next colourful one, which is percentage Licenses, that tells us exactly that what percentage of the licenses we purchased, were actually use.

1:56:49

Dark green is probably exceeding, goes through white to pink and red is very bad We see very low redemption figures for some of those titles.

1:57:00

Then we have the cost of each title, in total.

1:57:08

And the last two is cost per FTEs. That is literally how much a copy has cost us.

1:57:14

And the final column is how much it actually cost per user.

1:57:20

Now, you see the figures in the cost per FTE, roughly about the same 20, £30 for copy, That's fairly standard for any textbook.

1:57:28

But then there's a much bigger variety in what it's actually cost us ranging from, you know, a bit of a bargain all the way up to over £200 per user. So, way more than we anticipated that what that would cost us.

1:57:43

Something that you may have noticed, I'm highlighting here, is there is a bit of a different set, we've just taken. Again, this is just a snapshot of some of our new titles.

1:57:54

This is usage statistics, titles, that that was the first year we had in 21, 22, so in the FTA column, that's what we've bought in the user's column. You can see there's quite a lot of red. Not so much green, which is suggesting that when we base our figures on FTE, we are massively overestimated. you can see in the percentage is a lot of red and pink and only really a handful of green titles.

1:58:21

So, that's starting to suggest to me that actually purchasing strategies could do with a bit more evidence base. So, compare that with the usage statistics for our renewed titles where we have gone in and used data over the last, however, many years is to refine and adjust the number of licenses that we purchase. It's a year or the process, and it takes a long time, but you can see there's a lot of great. In fact, quite a lot of those we've oversubscribed.

1:58:52

We have more user licenses Now, I'll talk about that a little bit later, but it's quite interesting.

1:58:57

Um, so that's a little snapshot there, of how the work that we've done adjusting has made some difference.

1:59:06

So, what adjustments do we make in the light of that kind of usage behaviour?

1:59:12

Well, again, this is a little bit more complicated spreadsheet, but I'll just talk you through it.

1:59:15

So, on the left here, this is the activity that happened at the end of the 21 22 academic years, so in the column. Marc, 21 22 of the yellow stuff. That's how many licenses we bought last year.

1:59:28

Let me see what adjustments we've made, and then how many licenses we bought this, and you can see for most of those new titles, we've actually reduced the number of licenses we purchase based on that very start and usage data.

1:59:40

So, you know, they've gone down from as much as 250 down to 90 because, obviously, that overestimate has been corrected.

1:59:50

I mean, in the right-hand column, this, these are our new titles. Actually, it's a mixed picture. They go up and down quite a lot, and I'm not saying this isn't a fair bit of work. But all the time there were thing is going on with reading lists, with additions and subtractions, and we're constantly trying to refine.

2:00:05

But I guess the point that I want to make here is that the column of 2021 for the renew titles looks quite different to the column, 22, 23. So there's been quite a lot of adjustment over the intervening years as we try and get figures to match that. Like you know, the occasion the magic it as a few notes in there, which on PC.

2:00:23

But what it's allowed us to do, is to literally make those adjustments each year. Something that goes up, something that goes down, constantly chasing the data. But at least we're trying to eliminate wastage, as we did.

2:00:38

Well, I would say, you know, we we submitted those figures there on the rights of our supply this year as they understand what we're doing, bad things.

2:00:47

What I would say is it's super important to have a good working relationship with your supplier and with the publishers who appear in your E textbook scheme. In order to make this work. It's really important that you trust each other. And you talk to each other about what you're doing here.

2:01:05

So, somebody asked me when I was putting this presentation together site, does this approach actually save any money? And in all honesty, I think the usage-based approach isn't actually about saving money. It's more about finding a clever way of distributing money. Eliminating wastage, and it really allows us to pay for what we use really, without having to pay the higher costs of perhaps a user activated model. And it also helps free up money to buy new items or additional licensees. May I have a pot of money to give them to me every year.

2:01:38

Like most of us, I have a rough idea of what I want to spend on E textbooks.

2:01:42

But the most important thing for me is that, you know, I want to make sure, as close to 100% of my funds are spent on things that students want to use, and researchers need to use, that these are things that where there's active user engagement, I guess where we do save money, if that's the right word is, you know, those titles are less well used when we re-adjust the following year. That does free up money, and we're able to redirect that into buying more licenses with our business. It's just sensible budgeting, really.

2:02:16

Someone else asked me, if it's fair. Well, I mean, first of all, let's look at whether the text model itself is fair.

2:02:24

That's a presentation for a different day. And, you know, we're trying to provide equitable access. We're often being forced into this one's one bottle because it's, there's no every access available.

2:02:36

And it's becoming increasingly common, especially in textbooks.

2:02:40

But, you know, when I spoke to published, isn't, you know, the challenge me about us and said, you know, why do you want to do this?

2:02:46

FTE numbers, you know, they sometimes include the same students, who are just studying two separates, but slightly related modules. They're not going to go out and buy two copies of themselves. All right, so why would we do that? For them and showing them data, life I've just showed you, has really helped in negotiating.

2:03:04

What I think is a fairly obvious issue, you know, you can go to court, is basically decide that both what 250 students is very likely they're the same people, so you just have it.

2:03:15

Um, in terms of fairness as well I mean this is a model with an inbuilt wastage. As I said at the beginning and it's no surprise, this is, I don't have a huge amount of actual data, which I understand is No, no. For this kind of presentation but anecdotally, at least, redemption figures in the UK run around about 50 to 60%. You saw the ones where we purchase base just so the FTEs and we were we were redeeming about 50% allows.

2:03:41

Remember the University of Sussex did a report a couple of years ago, and they mean average of 65%.

2:03:49

Now I've spoken to suppliers, and they will say that two thirds or three quarters redemptions. It's actually pretty high level of engagement. So, there's obviously an issue here. So, I think this is a fair way of addressing that.

2:04:08

one thing that you do need to have in place, I said, I'd talk about this later, you saw that some of our renewables had actually been used more than the number of licenses we had in place. So, how does that happen? So, some of you may have heard of this, those of you who run the textbook scheme, so, there's a model.

2:04:24

I talked about how the model changed earlier.

2:04:26

There's, there's a model called Broadening Access and what that essentially means is the number of copies you purchase isn't there's no hard and fast cap on that. You buy a certain number of copies but actually that allows all the students who aren't on that module to access it, and you can put it in your discovery layer.

2:04:44

So, it's all built a cushion in, in case your predicted FTE numbers won't be 100% accurate. And they won't pay no, or publishers allow it. But it's something that I am, the sector really pushed hard for.

2:04:56

The argument being that you're buying a set number of copies for set number of students, and, of course, it's not really a library model, is more of a department model. It's bad news, when the FT's our role, you know, we can create a lot of extra work topping up licensees, and let's be honest. You know, if we are, if we do trust each of us that publishes as we perhaps underestimated the next year we were promised by those extra licenses and that's part of the working relationship.

2:05:26

I think we're broadening access has really helped us it built in that bit of flexibility in your negotiations. So, I've convinced publishers to allow it because that potentially get greater sales the following year, and we prefer it because there's no danger of getting any turn aways. So that's something that is crucial to get in place if you want to do this.

2:05:47

So, we've looked at the problems, we've looked at, some of the things that we've, what we've done, you might be interested to see what actual impact this has had on us.

2:05:57

So, unsurprisingly, license numbers much better match our predicted user numbers.

2:06:04

So, in 21 22, all the data I've shown you, Imperial had a redemption rate of 94%.

2:06:11

So, way above what we've been told by is average by suppliers. We pull up just over 13,000 licenses in total, 12.5 thousand which were redeemed.

2:06:22

But, as we saw, there's a there's a big difference between the licenses where we have evidence and where we don't send new orders of the 4000 people. Only just over 2000 redeemed 50% or so.

2:06:34

For the renewals, we've seen a little bit more usage than we actually pay for, but that's fine.

2:06:40

So that's certainly helped. and what that demonstrates is is less wastage.

2:06:44

You know we're beginning to eliminate wastage across the collection in 21 to see those new titles, which I showed you that cost £130,000. And if only 52% of them were redeemed that means we've spent £69,000 on unused licenses.

2:07:03

So yeah, you're talking about inbuilt wastage, right?

2:07:08

So, what we've been able to do by bringing in some data and usage statistics, analysis, is better value for money.

2:07:18

So, those new titles were talking about on average they cost just over 31 quid. But, the average cost per redemption was £61, which is much is very poor value for money.

2:07:30

Where is the average license costs for our renewals that have evidence base behind them? Is £25 and redemption cost is roughly similar to there'll be less now, something that you probably noticed about those figures. Not only is the redemption cost different, but the actual unit costs of licenses different.

2:07:47

There's a couple of reasons. But firstly, our ongoing titles were more common than the ones tend to be a bit more leisurely. They do attract premium.

2:07:57

I think, you know, we've had ongoing discounts for some of our rolling subscription costs, Again, that it's built in.

2:08:03

But that's really, you know, it's testament to our negotiation scale was really, that, based on this usage that we can do, that we know it's a long-term relationship. We're looking at usage.

2:08:13

We know that where we have underestimated publisher stands to make more money because we're going to buy more licenses.

2:08:20

And as a result, with that, being upfront, you can see we've been able to reduce the average license cost over time, relatively significant percentage.

2:08:33

Something that I just really wanted to touch on is how you using usage stats rather than FTEs. It's allowed us to be much more flexible with how the collection has grown.

2:08:44

You know, we saw there that with, respectively, waste at 69 grand on stuff, that wasn't nice.

2:08:49

So, when we report the next year, and we cut those FTEs to the, you know, we said 100% to the 52%, perhaps, that is freed up £69,000 to spend either on additional licenses for, you know, heavily use titles we already own, but it's also allowed us to buy some new stuff as well.

2:09:08

So when a librarian Councilman said, Andrew, is there going to be any money in the budget next year for this? I can be fairly comfortable looking at it, saying, yes.

2:09:15

We're going to be able to clawback certainly some of this, and it means that we never have to say no, it's a much easier way of more flexible way of managing your budget. And we've been able to accommodate those new titles because we know we'll be able to re-adjust our figures in the coming academic year.

2:09:31

It's not an exact science, but it makes the textbook escape a little bit more flexible.

2:09:40

And the last thing, I really wanted to talk about, the last impact it's had on us, apart from, you know, making things a bit easier and all the rest of it, I think we probably all, the librarians, on this call, we're all kind of in the same boat, that there are more and more demands being made of us. But we're being asked to evidence our decisions much more.

2:10:01

So, when we decide what funding needs to be directed, we're increasingly needs to be backed up by hard evidence. You know, what we're buying the only represent value for money, but it's contributing to more positive experience for students, that it's, it's being seen to make a difference.

2:10:18

So, when we started to use usage data, we feel that we really can do that.

2:10:23

You know, first of all, by actively using that data, we're demonstrating that our funds are being used as efficiently as possible.

2:10:32

You know, we're making evidence-based adjustments, maximizing our money, and eliminating wastage to become good evidence to suggest we're doing that. And secondly, we're demonstrating the funds are being used as efficiently as possible. You know, we're using data to make sure we're directing money towards resources that we know are being very heavily engaged with.

2:10:55

And so, we know that they're very critical to our users.

2:10:59

Um, yeah. In a market where the models are less than ideal, I don't think that's a bad result.

2:11:08

That's all I had to say, and I'm very happy to take some questions from anybody.

2:11:15

Thank you, Andrew. Interesting numbers. Really interesting, though, because you definitely have some questions. The first one is from Jane, and she's asking, do you count all users or do you discount any users that have access to E textbook for less than five minutes total?

2:11:35

It's an interesting question.

2:11:37

I think if you get too bogged down in the data, then it's gotta be, we've got over 200 titles in our portfolio. So, we do include everyone, that visit, and, as I said, it's always caveat that it's not an exact science.

2:11:55

I think if you're looking for engagement, it's useful to just say how many people have visited this text? I think it's then, when we take it to the library, it's a little bit more work around it.

2:12:07

They would look at that more drill down detail, the more granular statistics, to say, Well, actually, what is the level of engagement? How many minutes have the student ever done highlighting all the rest of it? I mean, for us, as librarians, statistics are, you know, they're very blunt instrument sometimes, but we're just looking really for, you know, someone's engaged with the title, even if it's just fleetingly .

2:12:35

Yeah. Thanks.

2:12:37

And the other question is from Matt. And he's asking, How do you identify which E textbooks to purchase? How do you decide which courses get an E textbook is it led by academic requests, or do you target high student number modules, for example?

2:12:56

Yeah, all of that, and more, primarily, it comes for reading lists, And we would run reports to see if there are core titles on a reading list that are only available in print, don't have a general e-book access to it. They would become candidates, but librarians within sift through, and we see how much money we've got, we get direct requests from academics.

2:13:22

When we first started this scheme, we were looking at heavily used print items.

2:13:29

What I would avoid? But I've just caution against is always using cohorts of very large numbers. That is one way that we did do it, but very soon we learnt there are some courses, it's actually quite small cohorts that needs titles very desperately, sometimes the lowest is 5 , but it's a critical title for a postgraduate course.

2:13:51

Did start with that and say, well, look, there's a thousand students, so there's obviously a good candidate for the textbook. It's got a bit expensive, but that's fine.

2:13:59

But it's more really around availability, in other electronic pathways. And, again, looking at usage, either print usage or previously, but usage and sort of build a picture of what would make an ideal or sensible candidate, because we're going to be spending a lot of money on these titles.

2:14:19

Thank you. And a question about the funding is the E textbooks projects at Imperial Library funded or centrally funded?

2:14:29

That comes out of my acquisitions budget. What I would say is that, during Covid, we got a little bit of extra money off, thank a few people, they just to kind of get things going. And I've been able to hang onto that since it is nice. Well, let's start with a complement first from Karen. Thanks for the presentation.

2:14:52

Then, there's the question, could I ask you, if you have managed to get bound for non textbook, and also for journal subscriptions?

2:15:01

We have a similar issue with Publisher thinking that, although you have a number of FTEs that everybody will access content, that isn't the case, as we deal with so many different subject areas, and sometimes only 1% of the organization will use that content.

2:15:17

Yeah, Oh, it's an age old question, isn't it? The answer, unfortunately, is it's a case by case basis. The subsidy is separate at Imperial. So they deal with that.

2:15:26

But I know that they work ceaselessly to keep grabbing this home that, you know, if it's a maths resource, only the maths department going to be using it. So, you want to take that. FTA might be a thousand people. So where are we paying for, across the institution? I don't know how much progress they make, but I know that always enters their conversations.

2:15:49

The funny thing about Imperial is it's actually not a huge school, but people seem to think it's imperial. So they can attach a premium to, and I'm very keen, say, word out on the money. That's not the way it works. But what I would say, I hope it's OK. Because of the presentation that moving away from FTEs is actually quite good idea.

2:16:08

That's not always reflected in the usage. And as I said, we don't really know what those numbers mean. Certainly, when it then translates to publishers, they seem to have an idea of who's doing what, and I'd love to see how they calculate these numbers. But, you know, if I've managed to E textbooks, I don't see any reason why we couldn't do it.

2:16:28

If you're prepared to be a little bit hard and fast in negotiations, go for it.

2:16:36

Well, thank you.

2:16:37

What we do have some more questions coming in, but also looking at the time, as we will have running late, the previous presentation. So, I'm just going to ask some more questions to

this one. From Jennifer, given your data. Is there an argument for asking publishers to develop discounted introductory offer rather than charge a premium for new titles?

2:16:59

Yes.

2:17:03

Yeah, again, that's something that crops up into our negotiations.

2:17:08

If you run an E textbook scheme, this is guaranteed money for the publishers forever. I don't know when they stops. But it's definitely going to be every year. So all the time and I meet them, we try to find ways of, you know.

2:17:23

Eventually, we'll get to a stage where we can't add anything more without subtracting something like it's a lot of budgets.

2:17:29

Once we've, we've refined this to within, you know, everything is exactly usage base.

2:17:36

Unless we get more funding, we simply can't buy any more material, but the publisher is still going to be getting the same amount of money. I'd love to find a clever, unfair way of saying, well, hold on. But guaranteeing you this amount of money.

2:17:49

What can you do to give us more content?

2:17:50

And I am aware that two, of the primary suppliers, at least for E textbooks, have looked into that. So, you can, So, you know, you give them a massive amount of money, but you are, then, you know, they're opening up large catalogues to you ours is a title by title scheme.

2:18:06

So at the moment, we're negotiating it and sometimes it takes quite a long time. I'll admit, we're negotiating, sometimes, book by book, by book, published, by publisher, at that.

2:18:14

But I think this is a question for Bibliu and Kortex and vital source to say, what better role can you play in the negotiations between us as libraries and publishers?

2:18:28

And then another question from Victoria.

2:18:31

What percentage of your deals actually allow for the broadening access model to be able to achieve higher users than licenses? Must be quite high. Yeah.

2:18:41

I'd say over 90% all the big publishes bar one allow it. Where we struggle a little bit is with some of the smaller publishers, not unheard of, one's university presses, and the smaller publishers.

2:18:56

And it may just be that no one's really sat down and said to them, Can we do this? Please?

2:19:00

It's not really within my gift to do that, like I have a longstanding relationship with the bigger publishers just because I'm sort of nosy, You know, like, meeting people, all the rest of it. And if I could get in the room with, the smaller publishers we could probably do it, but it's, it's nearly all of them, I would say.

2:19:19

Thank you, then one compliments, and one last question. Great talk, so useful.

2:19:24

There you go. And the last question is from Sarah, and that is, what mechanism do you use for the usage stats?

2:19:31

Yeah, pretty, I meant to say in the presentation and I knew I was gonna forget, all of that is based from the suppliers own platform with. I'm going to caveat. There was quite a lot of data wrangling by me during the summer.

2:19:46

The supplier lists the number of users, as just the number. Be careful, because that is just got us a bit more complicated than it probably should be. But we have a book for a year.

2:20:00

If a user starts using it the day before the end of that subscription, they use will appear for another 365 days. So, next year, you're looking at users from the previous year. It's really annoying. But yeah, so we gave from the supplier. Then I do a fair amount of fumbling around with it.

2:20:18

So, you know, I was talking before about trust. We've got to rely on the publisher or the supplier beg your pardon, giving us real statistics. We've worked hard with them to make sure that, you know, where are these figures coming from, what does that represent? What is a user? And I think that's where reflected across the usage stats community. I basically felt were put into big Spreadsheet, and you see the work I've done with it.

2:20:44

But it's quite easy to get, is quite nice.

2:20:48

And I'm handing over to Nathan now.

2:20:53

And, again, thank you very much for a great presentation. Pleasure.

2:21:03

Thank you, Andrew for a great presentation.

2:21:09

Now, with two half day session, and like to thank all the presenters today and also yesterday.

2:21:24

Presentation have been really informative, I've learnt a lot and something that might follow upon myself as well, or talk to other people.

2:21:37

I want to say the event that after the event a feedback form will be emailed to delegates

2:21:43

If you could return the form, because that gives us useful information on how to put together future seminars like this.

also to Vicki, too, for organizing this and, um, everybody else at UKSG who may be involved in this as well.

2:22:10

Um, I think that's for me,

2:22:15

Mhm.

2:22:31

Thanks to everybody attending. And also, thanks to you, Nathan.

2:22:39

OK?

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