Memorandum

To: Charlie Perusse  
UNC Vice President for Finance  
Suzanne Ortega  
UNC Senior Vice President for Academic Affairs

From: Dana Sally  
University Library Advisory Council (ULAC), Chair

Re: Collaborative Efficiency Review Response and Action Plan

Date: October 26, 2012

As ULAC chair, I write to convey the group’s response to the August, 2012, Collaborative Efficiency Review report and to share for your review the actions planned by ULAC to address the five specific recommendations contained in the report.

UNC libraries were instrumental in collecting and contributing report data and appreciate the recent support provided by OSBM in our continuing effort both to effectively steward the State’s resources and specifically, to obtain the best possible value with regard to electronic journal access. The libraries were pleased that the report recognized the central importance of journal access to the teaching and learning mission of UNC, as well as the tremendous efficiencies that have already been realized across all UNC libraries through various consortial and collective negotiation strategies. To date, these combined efforts have resulted in significant savings and dramatically enhanced access for our students, faculty and staff. Additionally, these combined efforts have succeeded in reducing information access asymmetries, which have long existed across the system.

In seeking yet further value and efficiency with regard to e-journal access, a working group has been formed to carry out the following specific actions in response to the report’s recommendations:

A.1.

The working group will continue to gather data from the UNC libraries related to e-journal costs and use. The data will be standardized based upon accepted understandings of access and cost and discrepancies in the original report’s data corrected. Use and cost data will be appropriately matched by time period for best time series analyses. The repository will be hosted at the UNCG library; data and information will be available to all libraries for negotiation and budget management purposes.
B.2.

Using data gathered prior to the official launch of any yet-to-be developed plan on July 1, 2013, the working group will recommend a plan, or model, for improving the cost/benefit ratio of system e-journal purchasing. As indicated in the report, the plan “may include coordinated action by a number of schools, individual actions by each institution, and other permutations.” In other words, it could describe a flexible model and approach to secure better value with regard to e-journal access. The plan will articulate factors derived from the data analyses that seem most productive of enhanced access and value across all UNC libraries. The initial plan will consider all 13 publishers listed in the report, but will focus particularly on the four “higher-risk” publishers that were identified (viz., Elsevier, Wiley-Blackwell, Taylor & Francis, and Oxford University Press).

C.1.

Recognizing that there is not a common UNC e-procurement system, the working group will investigate and identify common products—excluding intellectual content products—that might be purchased at lower prices through volume discounts. Routine operational supplies and equipment, such as archival supplies, book care and repair, security equipment, disaster preparedness, labels, protectors, and bar coding are examples of such products.

C.2.

The working group will assemble sample e-journal licensing templates that have the potential to improve access by ensuring uniform terms and conditions. These templates will serve as models for developing a contract licensing approach that will provide access and administrative benefits.

D.1.

The working group will review and report on the state-of-the-art of open access publishing as it relates to the dissemination and access of faculty research and scholarship. The report could be broadly shared with communities who have an interest in, and a concern for, scholarly communication, and specifically the complex relationship between the access, dissemination, and impact of scholarly and creative work. It could also contain recommendations, or suggestions, for working together system-wide to share best practices for promoting Open Access publishing.

As the libraries move forward with these activities, we will keep you informed of our progress. Your continued support of our efforts to keep the knowledge infrastructure of the UNC system as strong as possible is needed, appreciated, and vital.