How to Sell Your Faculty and Stakeholders on Open Access

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Meet the Presenters

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Attitudes Toward OA
Common Misconceptions and Roadblocks
What the data says: Attitudes toward OA

Scope of Search:
- Scopus
- Web of Science

Analytical Methodology:
- Panel of Experts
- Delphi Consensus

Faculty and OA

- Trust
- Financial Concerns
- Complexity
- Prestige
- Institutional Culture

Faculty and OA

Methodology:

• Survey of 468 faculty at a large R2 institution (34% of the 1,383 who received the survey)
• Survey respondents included both tenured and untenured faculty
• Respondents covered all disciplines at the institution

Perceived barriers to publishing OA:

- Cost (163)
- Lack of journal’s name recognition (194)
- Promotion and tenure requirements (125)
- Quality (143)

“The long-standing system of authors providing free work, disciplinary colleagues providing free labor as reviewers and editors, and then publishers charging substantial prices for hard copy or electronic access is a scam and embarrassment to higher education. The oligopoly of top journals owned by a handful of for-profit publishers systematically abuses the system.”

“I support [OA] publishing wholeheartedly, and we need to keep pushing. Meanwhile, I teach my students to pirate at sci-hub. They paid for the research and the researcher salaries with their tax money, and hiding knowledge for greed holds back humanity. I feel zero regret depriving greedy high-profit rentier leeches of investment income when the scientists get nothing for their work.”

Persistent Myths of OA

Myth #1: All or most OA content can be found in the DOAJ

Myth #2: Articles in open access journals are predatory and not peer-reviewed

Myth #3: OA is just a way for libraries to save money

Myth #4: OA and OER materials are harder to find and use
Myth #1: All or most OA content can be found in the DOAJ
There’s a lot of it

60M+ OA resources (incl. books, data sets, etc.)

Since 2017, 55% of all digital scholarly articles have been published OA

3.9M OA articles were published in 2023–60% of scholarly articles

Only 16% indexed in the DOAJ

Percent of papers that are OA by year of publication

Sources
https://doaj.org/
https://www.lens.org/
Portenoy (2018)
Most OA content does NOT come from DOAJ

Directory of Open Access Journal (Gold & Diamond journals) represents 16% of OA Article content.

Hybrid Journals and other OA "colors" represent 84% of OA Article Content.

Hybrid journals are from top publishers who wish to include content from authors with OA-mandated funding.

Articles from hybrid journals are often not visible in discovery services unless the journal is licensed.

Funders include Universities, Research centers, Foundations, Government agencies, Institutions, Consortia, > 300 funders and institutions worldwide.

Sources
https://doaj.org/
https://open-access.network/en/information/financing/research-funders-and-open-access
Myth #2: Articles in OA Journals are Predatory and not Peer-Reviewed
It’s in the best journals: %OA in 2017+ Publications

102K+ Journals publishing OA content

Source
https://www.scimagojr.com/journalrank.php?type=j
It’s being published by traditional publishers

Source
https://www.lens.org/
Myth #3: OA is just a way for libraries to save money
College is expensive!

- In 2021-2022, the average cost of books and supplies for a first-year college student was $1,215.

The percentage of college faculty using free open educational resources grew from 5% in 2015-2016 to 22% in 2021-2022.

Source: Digest of Educational Statistics. (2022)
CloudSource OA Collection

- **Articles**
  - 60M Total
  - 102K+ Journals

- **eBooks & eTextbooks**
  - 80K+ Total

- **Other OER**
  - 36K Total
The Rising Cost of Databases

OA, AI, and DEI—Triple Advantage or Triple Threat? | Periodicals Price Survey 2024

Where will the OA, AI, and DEI trifecta take us next?

Since the Great Recession, librarians have learned at least they can to manage an annual serials subscription model that inevitably outpaced flat or declining collection budgets. Many librarians lauded the development of Open Access (OA) publishing models, which offered, or at least initially, to help solve the problem of an unsustainable and inequitable scholarly.

Myth #4: OA and OER Materials are Harder to Find and Use
- Global OA and OER aggregation
- Advanced search builder
- One click access to full-text with no login or authentication
- Enriched metadata
- Transparent sources and author affiliations
- Citation metrics and peer review status
- Boolean searches with robust limiters
- Robust citation tools
## Collection Analysis

- Analysis to reveal overlap of existing eJournal subscriptions with CloudSource OA index
- Easy process: provide list of journal databases/packages and their suppliers/vendors
- Breakdown by database, journal title, and subjects
- Also revealed: expanded article access
- Available at no cost!
Open Access Collection Analysis
Summit Library
### Detailed Breakdown by Packages and Journals

<table>
<thead>
<tr>
<th>Subscription Name</th>
<th>Vendor</th>
<th>O.J. Articles</th>
<th>Total Articles</th>
<th>%OA</th>
<th>O.J. Articles 2017</th>
<th>Total Articles 2017</th>
<th>%OA 2017</th>
<th>Journals Matched</th>
<th>Journals Not Indexed in CS</th>
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</thead>
<tbody>
<tr>
<td>1 Academic Search Complete</td>
<td>EBSCO</td>
<td>5,977,327</td>
<td>11,461,620</td>
<td>60%</td>
<td>2,089,691</td>
<td>2,965,933</td>
<td>70%</td>
<td>4,966</td>
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<td>2 HealthSource</td>
<td>EBSCO</td>
<td>19,677</td>
<td>29,599</td>
<td>60%</td>
<td>9,209</td>
<td>11,908</td>
<td>70%</td>
<td>16</td>
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<td>3 American Institute of Mathematical Sciences (AIMS)</td>
<td>AMERICAN INSTITUTE OF MATHEMATICAL SCIENCES</td>
<td>160</td>
<td>161</td>
<td>100%</td>
<td>123</td>
<td>123</td>
<td>100%</td>
<td>1</td>
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<tr>
<td>4 American Physical Society</td>
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<td>43%</td>
<td>1,264</td>
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<td>5 American Theological Library Association (ATLA) Historical Monographs Collection Series 2</td>
<td>EBSCO</td>
<td>177</td>
<td>1,220</td>
<td>14%</td>
<td>44</td>
<td>125</td>
<td>25%</td>
<td>1</td>
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<td>6 Associates Programs Source</td>
<td>EBSCO</td>
<td>24,338</td>
<td>152,959</td>
<td>16%</td>
<td>7,204</td>
<td>17,182</td>
<td>45%</td>
<td>92</td>
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<td>7 ATLA Religion Database with ATLASerials (EBSCO)</td>
<td>EBSCO</td>
<td>586,059</td>
<td>2,685,231</td>
<td>16%</td>
<td>134,828</td>
<td>378,013</td>
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<td>1,381</td>
<td>1,177</td>
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<td>8 ATLA Religion Database with ATLASerials PLUS</td>
<td>EBSCO</td>
<td>119,406</td>
<td>558,633</td>
<td>20%</td>
<td>42,484</td>
<td>101,227</td>
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<td>151</td>
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<td>9 ATLA SERIALS 2</td>
<td>EBSCO</td>
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<td>534,059</td>
<td>10%</td>
<td>38,054</td>
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<td>378</td>
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<td>50,539</td>
<td>329,953</td>
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<td>15,254</td>
<td>47,915</td>
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<td>4</td>
<td>113</td>
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<td>15,184</td>
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<td>147,690</td>
<td>397,208</td>
<td>44%</td>
<td>1,654</td>
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<td>15 Cambridge Journals 2016 Full Package North America</td>
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<td>15,536</td>
<td>4%</td>
<td>183</td>
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<td>754</td>
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<td>1,650,390</td>
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<td>130,360</td>
<td>215,877</td>
<td>56%</td>
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<td>18 Chicago Complete Collection - Current Access</td>
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<td>2%</td>
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<td>2,629</td>
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<td>19 Chicago Complete Collection - Full Run</td>
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<td>77,356</td>
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<td>17,798,023</td>
<td>97%</td>
<td>6,822,668</td>
<td>6,628,237</td>
<td>98%</td>
<td>17,681</td>
<td>634</td>
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<td>660</td>
<td>15%</td>
<td>42</td>
<td>201</td>
<td>21%</td>
<td>1</td>
<td>0</td>
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<td>25 Durham &amp; Pamplio, editors</td>
<td>DUNCE &amp; PAMPILO</td>
<td>95</td>
<td>1,286</td>
<td>7%</td>
<td>35</td>
<td>213</td>
<td>14%</td>
<td>1</td>
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<td>26 E&amp;Otext with Full Text</td>
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<td>61,216</td>
<td>136,518</td>
<td>53%</td>
<td>456</td>
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<td>27 Edinburgh University Press</td>
<td>EDINBURGH UNIVERSITY PRESS</td>
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<td>84,464</td>
<td>168,347</td>
<td>40%</td>
<td>303</td>
<td>189</td>
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<td>29 Consumer Journals</td>
<td>EBSCO</td>
<td>768,463</td>
<td>2,316,918</td>
<td>36%</td>
<td>228,853</td>
<td>445,723</td>
<td>51%</td>
<td>691</td>
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<td>30 Excerpta Publishing Journals</td>
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<td>257</td>
<td>1,527</td>
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<td>135</td>
<td>493</td>
<td>26%</td>
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<td>31 Excerpta Online - Humanities / Humanities</td>
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<td>4,135</td>
<td>4,333</td>
<td>9%</td>
<td>1,039</td>
<td>1,138</td>
<td>10%</td>
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<td>32 European Mathematical Society</td>
<td>EURONUMERICALS</td>
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<td>279</td>
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<td>195</td>
<td>195</td>
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<td>33 Federal Authors</td>
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<td>61,428</td>
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<td>34 GreenFile</td>
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<td>4,187</td>
<td>7,991</td>
<td>34%</td>
<td>1</td>
<td>0</td>
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<tr>
<td>35 Health Source - Consumer Edition</td>
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<td>18%</td>
<td>8,281</td>
<td>8,281</td>
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<td>14</td>
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<tr>
<td>36 HealthSource/Nursing/Academic Edition</td>
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<td>174,359</td>
<td>680,896</td>
<td>25%</td>
<td>45,192</td>
<td>102,492</td>
<td>44%</td>
<td>152</td>
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<td>83,676</td>
<td>36%</td>
<td>10,121</td>
<td>20,951</td>
<td>66%</td>
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<td>1,273,123</td>
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<td>60,956</td>
<td>175,405</td>
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<td>577</td>
<td>205</td>
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<tr>
<td>39 IngenioConnect</td>
<td>INGENTA</td>
<td>1,091</td>
<td>1,496</td>
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<td>382</td>
<td>546</td>
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<td>1,190,880</td>
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<td>33,784</td>
<td>78,140</td>
<td>37%</td>
<td>161</td>
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<td>16%</td>
<td>2,148,767</td>
<td>6,107,347</td>
<td>19%</td>
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<td>585,437</td>
<td>8%</td>
<td>5,097</td>
<td>58,886</td>
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<td>81,970</td>
<td>507,175</td>
<td>10%</td>
<td>14,267</td>
<td>38,075</td>
<td>38%</td>
<td>140</td>
<td>16</td>
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</tbody>
</table>

**Package Overlap**
- Packages Unavailable: 1
- Journal OA Overlap: 1
- Expanded Coverage: 7
- Reactive Journals: 2
- Non-OA Journals: 2
- Not Indexed in CS: 4
Strategies for Change

Persuading people
Recommended Reading:

- *Our Iceberg Is Melting: Changing and Succeeding Under Any Conditions* by John Kotter and Holger Rathgeber
- *crucial conversations: Tools for Talking When Stakes Are High* by Patterson, Grenny, McMillan, and Switzler
- *buy in: saving your good idea from getting shot down* by John P. Kotter and Lorne A. Whitehead
Direct the Rider

- Clear Direction
- Reduce “analysis paralysis”

Motivate the Elephant

- Appeal to the emotional “gut check”

Shape the Path

- Tweak the environment
- Remove obstacles

Ethos (Credibility)  Pathos (Values/Beliefs)  Logos (Logic)

Ethos | Character
Pathos | Emotion
Logos | Reason

Four ways to kill a good idea

- Fear Mongering (increasing anxiety - especially with anecdotes that connect to very real shared memories)
- Death by Delay (good idea, wrong time)
- Maze of Confusion (what about ___, what about ___, what about___ . . . )
- Character Assassination / Ridicule

<table>
<thead>
<tr>
<th>Type</th>
<th>Attack</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>“It’s too difficult to understand.”</td>
<td>Too many of our people will never understand the idea and, inevitably, will not help us make it happen.</td>
<td>Not a problem. We will make the required effort to convince them. It’s worth the effort to do so.</td>
</tr>
<tr>
<td>“It’s just too much work to do this.”</td>
<td>This seems too hard! I’m not sure we are up for it.</td>
<td>Hard can be good. A genuinely good new idea, facing time-consuming obstacles, can both raise our energy level and motivate us to eliminate wasted time.</td>
</tr>
<tr>
<td>“It won’t work here; we’re different!”</td>
<td>It won’t work here, because we are so different.</td>
<td>Yes it’s true, we’re different, but we are also very much the same.</td>
</tr>
<tr>
<td>“It puts us on a slippery slope.”</td>
<td>You’re on a slippery slope leading to a cliff. This small move today will lead to disaster tomorrow.</td>
<td>Good groups of people – all the time – use common sense as a guard rail to keep them from sliding into disaster.</td>
</tr>
<tr>
<td>“We can’t afford this.”</td>
<td>The plan may be fine, but we cannot do it without new sources of money.</td>
<td>Actually, most important changes are achieved without new sources of money.</td>
</tr>
<tr>
<td>“You’ll never convince enough people”</td>
<td>It will be impossible to get unanimous agreement with this plan.</td>
<td>You are absolutely right. That’s almost never possible, and that’s okay.</td>
</tr>
<tr>
<td>“We’re simply not equipped to do this.”</td>
<td>We don’t really have the skills or credentials to pull this off!</td>
<td>We have much of what we need, and we can and will get the rest.</td>
</tr>
</tbody>
</table>
Strategies for Change
Leading organizational change
The Big Opportunity

- INSTITUTE change
- CREATE a sense of urgency
- BUILD a guiding coalition
- FORM a strategic vision and initiatives
- GENERATE short-term wins
- ENABLE action by removing barriers
- ENLIST a volunteer army
- SUSTAIN acceleration
- ENABLE action by removing barriers
- SUSTAIN acceleration

Communicating Collections Cancellations to Campus: A Qualitative Study

Jaclyn McLean  
Diane Dawson

Journal: College & Research Libraries, Vol. 82 No. 1 pp. 19-43
Published: 2021-01-01. American Library Association, United States
ISSN: 0010-0870

Abstract

Academic libraries around the world are cancelling big deal journal subscriptions at an increasing rate. This is primarily due to budgetary challenges, the unsustainable hyperinflationary pricing of these packages, and a need to move toward new open access models. It is a complex situation with many vested interests and stakeholders. Some libraries have been the target of angry backlash from faculty after such cancellations. The purpose of this qualitative study is to discover strategies for communicating to the campus community about collections cancellations so that they will better understand and support the library in making these difficult decisions.
BUILD a guiding coalition
FORM a strategic vision and initiatives
ENLIST a volunteer army
ENABLE action by removing barriers

✓ Direct the Rider
✓ Shape the path

Librarians Meeting 3 May 2021 | Minutes

Attendees:

Discuss preparations for the Elsevier transition announcement
As the library has determined to cancel ScienceDirect and install a suite of replacement products, the transition in the coming months will be important for faculty. An announcement will be made soon, in order to catch faculty before they depart after graduation. The library will be informed in advance before the email goes out.

Communication Plan
Katie shared the details of the communication plan regarding the Elsevier transition. The plan will rely upon a combination of physical and digital communications including:

- DIGITAL:
  - Email (announcement & reminders)
    - After the initial announcement is made, there will be follow-up reminders for important days.
  - Social Media (outreach & reminders)
    - Email will be supplemented with social media in order to increase the reach of our communications.

- IN-PERSON:
  - GROUP (faculty meetings & community workshops)
    - Katie will organize group in-person and remote communication options including workshops, faculty meeting reminders, and training sessions.
  - INDIVIDUAL (liaison conversations & support)
    - Individual conversations with faculty will also be important, and Katie shared that she has prepared some support resources to facilitate these conversations.

Important Themes:
Katie shared that the communication plan was informed by a recent article published in ARL:

doi:10.5860/crl.82.1.10

Important themes for library communication include:
- University Leadership
- Person-to-Person Relationships & Interactions
- Library Stewardship & Expertise
- Internal Library Communication
- Cancellations Related to Broader Problems in Scholarly Publishing
- International Collaboration & Support (we are not alone)

Library Help Resources
Katie emphasized the importance of liaison interactions with departmental faculty, and shared that questions can be directed to Katie, and complaints can be routed to . To assist the library staff in fielding questions, Katie shared some resources:
1. Cheat Sheet
2. Elsevier Transition LibGuide

Community Help Resources
There will also be support available to the broader community, including:
- Elsevier Transition LibGuide
- ProQuest Training & Webinars
- Librarian Support

Announcements
- NA

Action Items Summary
- All:
  - Please review the help resources and direct questions to Katie or .

- Katie:
  - Katie will share the help documentation with the entire library team.
  - will alert the library team when the email announcement is scheduled to be released.
Dear [Department] Faculty,

As you are aware, the library recently announced the forthcoming replacement of its Elsevier ScienceDirect databases with a new package from a combination of vendors. I am pleased to inform you that the related replacement products from Gale, Alexander Street Press, and ProQuest are all now available for your use! I've listed some highlights below which may be of particular interest in your area:

- Database 1
- Database 2
- Database 3

For a full list of resources in your area (research guides, databases, etc.), go to the library's faculty page, and select your discipline in the drop-down menu.

Finally, a friendly reminder to those of you that utilize Elsevier journal articles in your course reading lists: we have put together a timeline and handy worksheet to help you navigate the transition in the coming months.

Please know that we're here to support you through this transition; feel free to reach out to me with any questions that you have!

Sincerely,

[Name / Signature]

[Signature Block]
ENLIST a volunteer army
ENABLE action by removing barriers
SUSTAIN acceleration

✓ Direct the Rider
✓ Shape the path

Dear Computer Science Faculty,

As you are aware, the library recently announced the forthcoming replacement of its Elsevier ScienceDirect databases with a new package from a combination of vendors. I am pleased to inform you that the related replacement products from Gale, Alexander Street Press, and ProQuest are all now available for your use! I've listed some highlights below which may be of particular interest in your area:

- **Computer Science Database**
  Provides access to computer topics from nearly 450 scholarly journals, trade publications, and consumer titles. Subjects covered include Computer Science, Information Systems, Computer Security, Database Design, Software Development, Web Commerce: LANs, WANs, Intranets, and the Internet.

- **Advanced Technologies & Aerospace Database**
  Provides extensive coverage of advanced technology literature. It is ideal for research into fields such as aeronautics, astronautics, communications, computer and information technology, electronics, lasers, solid-state materials and devices, space sciences, and telecommunications.

- **Science Database**
  ProQuest Science Journals provides research support for both the applied and general sciences.

- **ProQuest Central**
  Searches all of the above and databases and more!

For a full list of resources in your area (research guides, databases, etc.), go to the library's faculty page, and select your discipline in the drop-down menu.

Finally, a friendly reminder to those of you that utilize Elsevier journal articles in your course reading lists: we have put together a timeline and handy worksheet to help you navigate the transition in the coming months.

Please know that we're here to support you through this transition; feel free to reach out to me with any questions that you have!

Sincerely,

Katie Glaeser, EdD, MLIS
Pronouns: she/her/hers
Electronic Resources Librarian
University of Lynchburg
glaeser_k@lynchburg.edu
Schedule a virtual appointment
Find Alternative Access to Unsubscribed Articles

**Browser Plug-Ins**
- LibKey Nomad
- Unpaywall

**Search for open access**
- Google Scholar
- PubMed

**Get it from the Library**
- Search by Citation
- Use Interlibrary Loan

**Use your network**
- Email the author
- Contact your librarian

✓ Direct the Rider

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**Elsevier Transition Timeline**

**Gale Products Active**
1 April 2021
The library's replacement suite includes four databases from Gale. These products are now available.

**ProQuest Products Active**
1 July 2021
The library's ProQuest package will become available for use as of 1 July 2021.

**Check Thoroughly**
JULY - OCTOBER 2021
Identify Elsevier content in your course materials. Make a list of the titles that will need to be addressed in the coming days.

**Cross Reference & Replace**
OCTOBER - DECEMBER 2021
Check the library's continuing databases to identify alternate access or identify new titles if no alternate access exists. Update course materials with any changes. Work with your liaison librarian for Elsevier titles that are essential.

**Elsevier No Longer Available**
31 December 2021
The library's subscription to Elsevier will expire on 31 December 2021.
Unfortunately, our library is no match for the powerhouses of the scholarly publishing industry. However, professors and researchers are well positioned to influence the course of events. The biggest danger a publisher faces is people calling into question its free raw materials, volunteer labor force, and exploitative business model which builds profit margins at the expense of its authors' institutions of higher learning.

We encourage the faculty to take an active and participatory role in this conversation. The list below contains the steps that you can take to help make positive change.

<table>
<thead>
<tr>
<th>Call to Action!</th>
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<tbody>
<tr>
<td>Direct the Rider</td>
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<tr>
<td>Motivate the Elephant</td>
</tr>
<tr>
<td>Shape the Path</td>
</tr>
</tbody>
</table>

- **Understand** your rights for your existing publications
- **Retain your rights** as an author for future publications in scholarly journals
- **Share your work** using open licenses whenever possible
- **Evaluate publishing opportunities** carefully - both traditional, and open access; and contribute in peer review of open access journals whenever possible
- **Contribute** eligible work to your local institutional repository
- **Select open and affordable course materials**. Open educational resources (OER) offers the pedagogical flexibility to customize teaching and learning materials to your specific curricular goals; while also keeping costs down for the university and its students and ensuring access to required course content on day one

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ENLIST
a volunteer army

ENABLE
action by removing barriers

CloudSource
The Big Opportunity

CREATE a sense of urgency
BUILD a guiding coalition
FORM a strategic vision and initiatives
ENLIST a volunteer army
ENABLE action by removing barriers
GENERATE short-term wins
SUSTAIN acceleration
INSTITUTE change

GENERATE short-term wins
SUSTAIN acceleration
INSTITUTE change
References

- Directory of open access journals. DOAJ. (2024). https://doaj.org
Thank you for joining us!

Katie Glaeser, MLIS, EdD
CloudSource Product Manager
Katie.Glaeser@sirsidynix.com
CloudSource.net

Maryśka Connolly, MLIS
CloudSource Director of Partnerships & Communications
Maryska.Connolly@sirsidynix.com
CloudSource.net