What We’re Building
What We’re Building

Coalition for Networked Information
Washington, D.C. — 12.13.22

Maurice York
Director of Library Initiatives
Big Ten Academic Alliance
order of conversation

Tuesday, December 13

a little about B1G

guiding principles and values

what we’re building: shared print

what we’re building: open publishing

some early insights
We are not permitted to stand as spectators of the pageant which the times exhibit: we are parties also, and have a responsibility which is not to be declined.

—Ralph Waldo Emerson

Introductory Lecture on The Times, 1841
we are our own company - a legal entity - 501(c)3

can sign licenses / contracts - hold agreements
can own things, own property
we are our own company - a legal entity - 501(c)3

can sign licenses / contracts - hold agreements

can own things, own property

can be sued
our growth model

“small and light at the center,
the main activity is in the member libraries”
our growth model

- small and light at the center,
- the main activity is in the member libraries

Maurice York, maurice.york@btta.org | www.btta.org/library
our growth model: “small and light at the center, the main activity is in the member libraries”

60 years

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aspiration for a tremendous vision:

the BIG Collection

THROUGH COLLECTIVE ACTION
aspiration for a tremendous vision:

the BIG Collection

THROUGH COLLECTIVE ACTION

unite the collections

into one collection - shared - fully networked
aspiration for a tremendous vision:

the BIG Collection

THROUGH COLLECTIVE ACTION

unite the collections into one collection - shared - fully networked

increase findability and usability of the total pool of content across the Big Ten
aspiration for a tremendous vision:

the BIG Collection

THROUGH COLLECTIVE ACTION

unite the collections
into one collection - shared - fully networked

increase findability and usability
of the total pool of content across the Big Ten

depen our interdependence
optimize for the whole before individual interests
aspiration for a tremendous vision:

the BIG Collection

THROUGH COLLECTIVE ACTION

unite the collections
into one collection - shared - fully networked

increase findability and usability
of the total pool of content across the Big Ten

deepen our interdependence
optimize for the whole before individual interests

continually improve value at scale for our community
aspiration for a tremendous vision:

the BIG Collection

THROUGH COLLECTIVE ACTION

unite the collections
into one collection - shared - fully networked

increase findability and usability
of the total pool of content across the Big Ten

depen our interdependence
optimize for the whole before individual interests

continually improve value at scale for our community

increase resilience for an uncertain future for our universities

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IMPLEMENT THE

systems  services  policies

NECESSARY TO CREATE A

fully networked collection
IMPLEMENT THE

systems  services  policies

NECESSARY TO CREATE A

fully networked collection

IN ORDER TO

maximize access

serve our students & scholars

ensure preservation of the scholarly record

support our common mission

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what will it look like when we build it?
what will it look like when we build it?

EXPENDITURES | ITEMS
--- | ---
$696M | 173M+ | LIBRARY OF CONGRESS
£168M | 170M+ | BRITISH LIBRARY
$659M | 114M+ | BIG COLLECTION
C$117M | 55M | LIBRARY & ARCHIVES CANADA
$215M | 54M | NEW YORK PUBLIC LIBRARY

third largest library collection in the world
The State of the Print Collection

The Big Ten is a significant steward of the print collection in North America
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Approx. 114 million volumes distributed over 15 research libraries
22% of all print book titles in North America
The State of the Print Collection

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Approx. 114 million volumes distributed over 15 research libraries
22% of all print book titles in North America

more than half held by only a single BTAA library
only 6% duplicated in ten or more BTAA libraries
The State of the Print Collection

The Big Ten is a significant steward of the print collection in North America

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22% of all print book titles in North America

- more than half held by only a single BTAA library
- only 6% duplicated in ten or more BTAA libraries

In 2017 almost 80% of expenditures were for licensed,
not purchased content
the BIG Collection

IMAGINE.....
A brimming pool of every piece of print and digital content of all 15 member universities

IMAGINE...
Every student and faculty member with seamless discovery-to-delivery access to the pool

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In order to advance a just, trustworthy, scalable, and sustainable open knowledge ecosystem, make open, more equitable scholarship our lead purpose.
the KNOWLEDGE COMMONS
for the Big Ten will be

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the KNOWLEDGE COMMONS for the Big Ten will be

FINDABLE & USABLE

access to the total pool of knowledge
the KNOWLEDGE COMMONS for the Big Ten will be

FINDABLE & USABLE
access to the total pool of knowledge

OPEN & JUST
public knowledge for the public good
the KNOWLEDGE COMMONS for the Big Ten will be

- **FINDABLE & USABLE**: access to the total pool of knowledge
- **DURABLE & TRUSTWORTHY**: from past generations to future scholars
- **OPEN & JUST**: public knowledge for the public good

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the KNOWLEDGE COMMONS for the Big Ten will be

- **FINDABLE & USABLE**: access to the total pool of knowledge
- **DURABLE & TRUSTWORTHY**: from past generations to future scholars
- **OPEN & JUST**: public knowledge for the public good
- **INCLUSIVE & COLLABORATIVE**: vested in the community

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a Pragmatic Approach
a Pragmatic Approach

BUILD IT RIGHT
BUILD IT TO LAST
MAKE IT WORK

...on a foundation of
COMMITMENT & INTEGRITY
Innovation Model

- make small investments
- fail fast
- learn
- set aside what doesn’t work
- deepen the investment in what works
- take it to scale
Innovation Model

- make small investments
- fail fast
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- set aside what doesn’t work
- deepen the investment in what works
- take it to scale

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Pilots
“Seed” Resources
Make Small Investments

Projects
“Build” Resources
Take it to Scale

Programs
“Sustain” Resources
Run at Scale as Core Infrastructure
Mile 1

Any content, from anywhere, to anyone
now & in the future

1st Milemarker of the Big Collection
WHAT WE'RE BUILDING
INTEROPERABLE SYSTEMS OF TRUST
IMPLEMENT INFRASTRUCTURE SERVICES, STANDARDS & AGREEMENTS

MILE 1
ANY CONTENT, FROM ANYWHERE, TO ANYONE
NOW & IN THE FUTURE

1st Milemarker of BIG COLLECTION
WHAT WE'RE BUILDING
INTEROPERABLE SYSTEMS OF TRUST
IMPLEMENT
INFRASTRUCTURE SERVICES,
STANDARDS & AGREEMENTS

SYSTEMS OF TRUST FOR
PRINT COLLECTIONS

OPEN PUBLISHING
JOURNALS & MONOGRAPHS

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BIG COLLECTION
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INTEROPERABLE SYSTEMS OF TRUST
IMPLEMENT INFRASTRUCTURE SERVICES, STANDARDS & AGREEMENTS

SYSTEMS OF TRUST FOR PRINT COLLECTIONS
SYSTEMS OF TRUST FOR DIGITAL COLLECTIONS
SYSTEMS OF TRUST FOR OPEN PUBLISHING: JOURNALS & MONOGRAPHS

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WHAT WE'RE BUILDING
INTEROPERABLE SYSTEMS OF TRUST
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SYSTEMS OF TRUST FOR PRINT COLLECTIONS
Shared Print Repository

FIRST TWO PHASES
(“the 10-year project”)

central commitments allow independent local decisions

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Shared Print Repository

FIRST TWO PHASES
(“the 10-year project”)

central commitments allow independent local decisions
Shared Print Repository

FIRST TWO PHASES
(“the 10-year project”)

CENTRALIZED BUILDINGS
(REPOSITORIES)

PRESERVATION-GRADE
HIGH-DENSITY STORAGE

print journal backfiles

“commonly held"

~11.5k titles,
~450k volumes

central commitments allow independent local decisions

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Shared Print Repository

FIRST TWO PHASES
(“the 10-year project”)

CENTRALIZED BUILDINGS
(REPOSITORIES)

PRESERVATION-GRADE
HIGH-DENSITY STORAGE

print journal backfiles

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WHAT WE’VE LEARNED

how to operationalize:
selection
derivation
collocation
conditions of storage
levels of service

central commitments allow independent local decisions

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shared commitments enable coordinated local decisions for common benefit
Shared Print Program

DISTRIBUTED NETWORK OF SHARED HOLDING CAPACITY

FEDERATED MANAGEMENT - MANY ENTITIES JOINED FOR A COMMON PURPOSE

expand to monographs + serials

grow the shared collection rapidly

scale to millions of titles

begin with “what we have in high density storage”

balance preservation & access

provide equitable access to the total pool

shared commitments enable coordinated local decisions for common benefit

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How to build a true collective collection?

Technology-Focused Options for Implementation

MODEL A  Implement a the same ILS for all members —OR—

MODEL B  Run middleware to “glue” diverse systems together —OR—

MODEL C  Work with what you have and use features of existing software
Shared Print Program

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Shared Print Program

**Interdependent Services**

**Operational Agreements**

**Common Infrastructure**

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Shared Print Program

WHAT DO WE HOLD? (STOCKS)
Large scale collections analysis on 114M (?) records

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Shared Print Program

WHAT DO WE HOLD? (STOCKS)
Large scale collections analysis on 114M (?) records

HOW DOES IT MOVE? (FLOWS)
Borrowing infrastructure & Fulfillment analytics dashboard pilot

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Shared Print Program

**WHAT DO WE HOLD? (STOCKS)**
Large scale collections analysis on 114M (?) records

**HOW DOES IT MOVE? (FLOWS)**
Borrowing infrastructure & Fulfillment analytics dashboard pilot

**WHAT TECHNICAL INFRASTRUCTURE DO WE NEED?**
Pilot test of SCSB software used by the ReCap consortium

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Shared Print Program

**WHAT DO WE HOLD? (STOCKS)**
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**WHAT TECHNICAL INFRASTRUCTURE DO WE NEED?**
Pilot test of SCSB software used by the ReCap consortium

**HOW DO WE INCENTIVIZE RETENTION & ACCESS COMMITMENTS? (COST)**
Cost modeling for how to equitably model cost for a shared, distributed collection

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Example of the Pragmatic model
Example of the Pragmatic model

The “# of copies” question

....in which we consider a common (and gnarly) question in shared print:

“How many copies do we need to keep?”
Example of the Pragmatic model

The “# of copies” question
....in which we consider a common (and gnarly) question in shared print:
“How many copies do we need to keep?”

We’re trying out this approach:
“How many copies do we have?”
“Where are they?”
“What condition are they in?”
“What conditions are they stored in?”
“What is our combined, distributed, holding capacity?”

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Example of the Pragmatic model

The “# of copies” question

….in which we consider a common (and gnarly) question in shared print:
“How many copies do we need to keep?”

We’re trying out this approach:
“How many copies do we have?”

“Where are they?”

“What condition are they in?”

“What conditions are they stored in?”

“What is our combined, distributed, holding capacity?”

…and adopt a learning approach:

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Real-time Network intelligence:

THE BIG COLLECTION

WEATHER MAP

Any context, from anywhere, to anyone... from now into the future

NETWORK EFFICIENCY

OWNERSHIP TO STEWARDSHIP DIAL

NETWORK COSTS

Borrowing 25%
Returns 15%
Lending: 45%
Retention Commitments: 10%

INSTITUTIONAL STATUS

STOCKS (Holdings)

- ON: SHARED COLLECTION

- ON: LOCAL COLLECTIONS

- ON: DISTINCTIVE COLLECTIONS

FLOWS (Lending)

- ON: BORROWING

- ON: LENDING

- OFF: RETURNS

INSTITUTIONAL STATUS

= FULL SERVICE

= REDUCED SERVICE

= NO SERVICE

DATA SOURCES

EVENTS / ALERTS

TIME SCALE (months)

-24 -18 -12 -6 TODAY

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Network Intelligence

Exploratory Overlap Analysis

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BTAA Libraries

22.5M Bib records

Network Intelligence

Exploratory Overlap Analysis

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4
BTAA Libraries

3.4M
multi-institution

22.5M
Bib records

Network Intelligence
Exploratory Overlap Analysis

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BTAA Libraries

4

22.5M Bib records

3.4M multi-institution

3.5M “multiples”

only 19% overlap

Network Intelligence

Exploratory Overlap Analysis

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Network Intelligence

Exploratory Overlap Analysis

Research Project:
What data-driven network intelligence can we garner at scale and how can it be utilized?

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Pilot phases (stewardered by the Big Collection Steering Committee)

- **Pilot in planning phase:** forming charge and under review
- **Pilot under way:** approved, resourced, and active
- **Pilot complete:** report and recommendations delivered

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Pilot phases (steward by the Big Collection Steering Committee):

- **PLANNING**
  - Pilot in planning phase: forming charge and under review

- **PILOT UNDER WAY**
  - Pilot under way: approved, resourced, and active

- **COMPLETE**
  - Pilot complete: report and recommendations delivered

**KEY**

- **SCSB**
  - SHARED COLLECTION SERVICE BLOG

- **MATCHING ALGORITHM**

- **COMMITMENTS REGISTRY**

- **DATA STORE**

- **PATRON-DIRECT FULFILLMENT**

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#1 - UBorrow Visioning

#2 - Platform Refresh Options

#3 - Statistics / Analytics Dashboard

#4 - Policy Harmonization

**Pilot phases (stewarded by the Big Collection Steering Committee):**

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THE BIG COLLECTION
"SYSTEMS OF TRUST"

Conceptual diagram of a distributed systems architecture to support the BTAI Shared Collection.

**U'Borrow**

- **Delivery Backbone**
  - #1 - U'Borrow Visioning
  - #2 - Platform Refresh Options
  - #3 - Statistics / Analytics Dashboard
  - #4 - Policy Harmonization

**"BIG LAKE" DATA LAKE**

- 14m+ Records
- Bib Records
- Items
- Holdings
- Transactional Logs

**Key**

- Pilot in planning phase: forming charge and under review
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Pilot phases (steward by the Big Collection Steering Committee):

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PILOT #1 - UBorrow Visioning

PILOT #2 - Platform Refresh Options

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Pilot phases (stewarded by the Big Collection Steering Committee):
- Pilot in planning phase: forming charge and under review
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WHAT WE'RE BUILDING
INTEROPERABLE SYSTEMS OF TRUST
IMPLEMENT INFRASTRUCTURE SERVICES,
STANDARDS & AGREEMENTS

SYSTEMS OF TRUST FOR
PRINT COLLECTIONS
ROBUST DIGITIZATION NETWORKS
AUTOMATED DEPOSIT

SYSTEMS OF TRUST FOR
DIGITAL COLLECTIONS

SYSTEMS OF TRUST FOR
OPEN PUBLISHING
JOURNALS + MONOGRAPHS

How we'll work
Collective Action
Robust, Structured, Aligned Network

Organize the Community
1st Milemarker of the Big Collection

Diversity, Equity, Inclusion, Accessibility
Adversarial, Intentional Anti-Racism

Any content, from anywhere, to anyone
Now & in the Future

Change the Policies & Workflows
Who we'll be
WHAT WE'RE BUILDING
INTEROPERABLE SYSTEMS OF TRUST
IMPLEMENT INFRASTRUCTURE SERVICES,
STANDARDS & AGREEMENTS

SYSTEMS OF TRUST FOR
OPEN PUBLISHING
JOURNALS & MONOGRAPHS

MILE 1
ANY CONTENT, FROM ANYWHERE, TO ANYONE
NOW & THE FUTURE
1st Milemarker of the Big Collection
BTAA Library Consortial Licensing Portfolio

- Total Value: $50,938,000
  - Less than 11 members: $3,890,000
  - More than 11 members: $45,786,000
- Member Library portion: $49,584,000
  - Less than 11 members: $3,798,000
  - More than 11 members: $45,786,000
- Invoiced via BTAA: $22,261,000
  - Less than 11 members: $3,890,000
  - More than 11 members: $18,371,000
Current state of “Open” in the BTAA licensing portfolio: 2022
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Direction: Flip the “buying club” to move toward “open publishing”
Current state of “Open” in the BTAA licensing portfolio: 2022

Direction: Flip the “buying club” to move toward “open publishing”

"Openness" of portfolio by license count

- Open: 11.4%
- Negotiating: 2.3%
- OA Offer received: 2.3%
- OA Option discussed: 11.4%
- Subscription (no OA): 72.7%

COUNT BY # of LICENSES
August 2022

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Current state of “Open” in the BTAA licensing portfolio: 2022

Direction: Flip the “buying club” to move toward “open publishing”

COUNT BY # of LICENSES August 2022

COUNT BY $$ VALUE

Already Open at beginning of 2022 4%

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Current state of “Open” in the BTAA licensing portfolio: 2022

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COUNT BY # of LICENSES
August 2022

COUNT BY $$ VALUE

Already Open at beginning of 2022
4%

Institute of Physics 2022
4%

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COUNT BY # of LICENSES
August 2022

COUNT BY $$ VALUE

Already Open at beginning of 2022

$16M

32%

4%

4%

Institute of Physics 2022

Wiley 2022

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COUNT BY # of LICENSES
August 2022

COUNT BY $$ VALUE

Already Open at beginning of 2022

- 4% Institute of Physics 2022
- 32% Wiley 2022
- 35% Springer-Nature
- 2023
- ~Sage
- ~Springer-Nature

$16M
$17.2M

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COUNT BY # of LICENSES
August 2022

COUNT BY $$ VALUE

Already Open at beginning of 2022
4%
4%
Institute of Physics 2022

2023
~Sage
~Springer-Nature
35%

Subscription (no OA) $12.3M
72.7%

Subscription (no OA) $16M

Subscription (no OA) $17.2M
32%

Subscription (no OA) $18M

$12.3M
$16M
$17.2M

Openness" of portfolio by license count

Open 11.4%
Negotiating 2.3%
OA Offer received 2.3%
OA Option discussed 11.4%

COUNT BY $$ VALUE

32%

% of LICENSES
August 2022

35%

25%

32%

4%

4%
Developing a model for Open Publishing Agreements

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Developing a model for Open Publishing Agreements

We are equal partners investing in a transitional change whose outcome is uncertain. As investment partners, we should share the risk equitably.
Developing a model for Open Publishing Agreements

We are **equal partners investing** in a **transitional change** whose outcome is **uncertain**. As **investment partners**, we should **share the risk** equitably.

**pragmatic model = remove friction from the system**
Developing a model for Open Publishing Agreements

We are equal partners investing in a transitional change whose outcome is uncertain. As investment partners, we should share the risk equitably.

**pragmatic model = remove friction from the system**

- All open access, all journals: dispense with the “colors of OA”
Developing a model for Open Publishing Agreements

We are equal partners investing in a transitional change whose outcome is uncertain. As investment partners, we should share the risk equitably

**pragmatic model = remove friction from the system**

- All open access, all journals: dispense with the “colors of OA”
- No fees for authors, no caps, no limits, no hassle (...e.g., non-APC based!)
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• Authors keep rights to their own work
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• Authors keep rights to their own work
• Immediately open and available to the public
Developing a model for Open Publishing Agreements

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- Authors keep rights to their own work
- Immediately open and available to the public
- Libraries will pay no more than they do now (ongoing)
  - Convert our spend to “publishing”
Developing a model for Open Publishing Agreements

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- All workflow and labor to be handled by the publisher
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  - Convert our spend to “publishing”
- All workflow and labor to be handled by the publisher
- Engage in structured, meaningful (contractual!) conversations about:
  - DEI in editing and publishing
  - Stewardship of the scholarly record
Pilot project: Big Ten Open eBooks
A collaboration of six Big Ten presses + libraries

“Open, open, open” model:

open content
convert 100 monographs
(previously published) in
Gender & Sexuality studies to
open access digital books

hosted on open platforms
fulcrum + Manifold

distributed in open channels

Primary funding from Big Ten Libraries, supported in part by the Mellon Foundation
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OPEN SCHOLARSHIP STRATEGY

DECEMBER 2022

SUSTAINABLE
SCALABLE
OPEN KNOWLEDGE ECOSYSTEM
TRUSTWORTHY
JUST

ADVANCE THE GROWTH OF OPEN SCIENCE AND OPEN SCHOLARSHIP
OPEN SCHOLARSHIP STRATEGY

DECEMBER 2022

SUSTAINABLE
SCALABLE
OPEN KNOWLEDGE ECOSYSTEM

TRUSTWORTHY
JUST

ELEVATING MARGINALIZED & UNHEARD VOICES

BALANCING THE JOURNAL MARKETPLACE

STUDYING & UNDERSTANDING THE LANDSCAPE

OPEN PUBLISHING AGREEMENTS

ADVANCE THE GROWTH OF OPEN SCIENCE AND OPEN SCHOLARSHIP

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OPEN
SCHOLARSHIP
STRATEGY

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Make no little plans;
Make no little plans;

—Daniel Burnham
Make no little plans;
they have no magic to stir the blood
and probably themselves will not be realized.

Make big plans;

aim high in hope and work, remembering that a noble, logical
diagram once recorded will never die, but long after we are gone
be a living thing, asserting itself with ever-growing insistency.

—Daniel Burnham
UPDATE

Elliott’s prototypes
Real-time Network intelligence

UPDATE

Eliott’s prototypes
Network intelligence: Publishing

[numbers from the COKI OA dashboard]

[visualization of “where we publish” from Jeff’s dashboard]
Network intelligence: Publishing

[numbers from the COKI OA dashboard]

[visualization of “where we publish” from Jeff’s dashboard]

UPDATE

Create content
What is the scope of the BIG Collection?

What are its dimensions?
First Principles

- Community investment in a shared resource that is many times more powerful to the research mission centralized than distributed
- Egalitarian access to the tools of knowledge creation not selectively, but for all members of the community regardless of discipline, college affiliation, or status
- Provider of domain expertise to empower researchers by navigating and bringing vastly complex resources to bear on very specific questions and lines of inquiry
- Facilitator of interdisciplinary and cross-institutional collaboration a kind of neutral ground, a crossroads or commons, that nurtures inquiry and conversation outside of traditionally defined academic borders
- Long-term guardian and preserver of the research products of the institution libraries’ fundamental identity
First Principles