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Adventures in Rightsizing : Enhancing Discovery and Research With Open Access Journals in the University Library

Abstract

Academic libraries have long had print journal collections to support the university's discovery and research needs. However, they are also continually challenged with needs for relevant content, cost control, and space issues; some academic libraries have downsized their print journal collections as a result. Many academic libraries are replacing some print journal subscriptions with online subscriptions and supplementing with open access journals. Pittsburg State University's (PSU) Axe Library faces the challenge of providing journal access in order to support the university's needs and stay on budget. To that end, PSU drastically weeded its print journals in 2016 and later began to rightsize the subscription print and online journals. In 2017, it also began rightsizing open access journals due to noticing high usage statistics for open access journals not in the library's journal portal, duplication of open access journals in various open access databases, and bad URLs for open access journals. This article details PSU's efforts to rightsize open access journals with the goal being a relevant journal collection and services to enhance the discovery and research experience.

Keywords

open access journals, rightsizing, academic libraries, online journals

Introduction

Print journals collection development has long been an academic librarian role. However, academic libraries are also continually challenged with flat or cut budgets, annual cost increases, need to repurpose space, and difficult collection development decisions. As a result, print journal collections have declined and online journals, including open access, have taken their place alongside. PSU's Axe Library is no exception and must balance its print and online journal collections to support the university's needs and keep up with costs. In 2016, Axe Library weeded its print journals extensively due to upcoming construction that necessitated downsizing the print collection, a situation that Suzanne Ward refers to as a "rapid response scenario" (2015, p. 120-121). However, in 2017, Axe Library began to investigate rightsizing and as a result, realized the need to rightsize its print, microfilm, and online journals, including open access journals. Rightsizing can be best defined as a deliberate shaping of collections, services, and resources to fit what is actually needed by those served (Ward, p. 8). Rightsizing can enable a library to save money by not buying unneeded subscriptions, including those that overlap with other access, and spend money on needed resources instead. However, with open access journals, cost is a non-issue, but libraries can rightsize open access journals they provide access to and others patrons are using by examining data and ask if they are relevant for the university's discovery and scholarship needs.

To that end, academic libraries that want to provide open access journals for patrons must determine what process they should use to sustainably select them for the collection and provide access. In addition, open access journals present both benefits and challenges to academic libraries and their users. For example, they offer increased access to research and other scholarship in a variety of disciplines. Some open access journals are indexed in databases and discovery tools, so providing access can enable nearly seamless linking to full text without passwords to patrons on and off campus. One of the benefits is, of course, no subscription cost, which allows the library to provide access to potentially valuable material they may not otherwise have. However, they are not without pitfalls. One big challenge is that some are not peer reviewed or have questionable manuscript solicitation and publishing practices, as well as unstable websites and linking issues. However, others have rigorous peer review and standards equal to commercially published journals and provide access to cutting edge research and scholarship. Because many open access journals publish quality literature, academic libraries can use them to supplement subscriptions and expand access to relevant journals to serve the university's discovery and scholarship needs.

In addition, open access journals may already be getting used by university faculty or students because of the relevance to their discipline. This use can be measured through usage statistics collection sources, such as COUNTER or other statistics available from publishers or vendors. Faculty and students may also request open access journal articles on interlibrary loan because they are unaware that they are open access or ask that the library provide access on its website or in its catalog. This author submits that usage by the university community may be the best indicator of the need for an open access journal to be added to the library's resources. This article will detail some of the challenges of open access journals as well as enhancing the discovery and research experience and avoiding pitfalls.

Literature Review

Peer reviewed, scholarly journals are mainstays for academic libraries to support university discovery and scholarship needs, but flat and declining budgets have made providing subscription journals challenging (Johnson, 2018, p. 119-120).

Johnson adds that the “cost of periodicals has been increasing at a higher rate than US inflation and usually in excess of most libraries’ collection budgets” (p. 119). David Free, author of “2017 Academic Library Trends and Statistics” in *C&RL News* noted that in 2017, on average, academic libraries spent 73.8% of their materials budgets on “ongoing subscriptions” (2018, p. 407). Piwowar notes that the “increasing growth in the cost of toll-access subscriptions, ... has begun to force libraries and other institutions to initiate large-scale subscription cancellations ...” (2018, p. 2). While at one time, print journal ownership was the norm and even preferred, academic libraries’ print journal collections are declining while online journals access increases and space is reallocated (Ward, p. 8-9). This shift is part of what Rick Anderson says has led to a conflict of philosophies in research libraries where one side says research libraries serve the university and the other aims to improve “the world of scholarly communication” (2016, p. 50-51). In addition, online journals appeal to the university community due to their relevance and accessibility, and as Ward notes, patrons of the future “may be ... less concerned about where a particular article appears” than in its relevance (p. 130). While online access to journals is often preferred, even large libraries cannot subscribe to all journals; rightsizing allows libraries to improve access through evidence based planning.

The concept of rightsizing was developed in industry and according to the *Oxford English Dictionary*, which notes the term’s first known use in print, when it was discussed in a 1987 *Black Enterprise* article which referred to the downsizing of company employees. However, Suzanne Ward, author of *Rightsizing the Academic Library Collection*, applies it to academic libraries and describes it as “the strategic, thoughtful, balanced, and planned process whereby librarians shape the collection by taking into account ... disciplinary differences; the impact of electronic resources on study, teaching, and research; ... [and] previous use based on circulation statistics” (p. 8). Ward emphasizes that rightsizing is not just weeding, but is a continual process of removing obsolete material and adding new, relevant material (Ward, p. viii). While Ward does not specifically mention open access journals in her book, this author submits that rightsizing can be applied to them also.

Some authors note that the term open access journals covers a broad spectrum of types, including gold open access journals, where all articles are available immediately, to hybrid open access, where specific articles are open access when an author pays a fee (Piwowar, p. 3). While open access journals are used in many academic libraries, Bullock and Hosburgh relate the difficulties that some libraries encounter in managing them, including outdated title and holdings data in ERMs and linking problems, necessitating library staff to manage them (2015, p. 84). Online resources, subscription and open access, sometimes have issues, such as metadata problems, unreliable websites, and proxy problems, among others. Some respondents to Bullock and Hosburgh’s survey criticized ERMs for “lack of functionality” and said that they must resolve technical problems themselves, while others indicated that open access journals are “no more problematic than subscription-based electronic resources” (p. 84). However, Bullock and Hosburgh note that their survey shows that the biggest challenges when dealing with open access journals are difficulties keeping up with “sheer number of ... resources, ... 'unreliability' ... and lack of OA collection development criteria” (p. 84). They add that providing access to hybrid open access journals is problematic, because only some articles are available (Bullock and Hosburgh, p. 81).

For subscription journals, academic libraries may utilize collection development criteria, such as cost, usage statistics or projected usage, curriculum and research needs, faculty requests for access, indexing, and “duplication of existing library resources” (Johnson, p. 126-127). However, for open access journals, cost is a non-issue, and peer review status and publication standards vary from one to another. Some open access journals have been described as “predatory” because they prey on

unsuspecting researchers who wish to publish their research. Andrews notes that the main problem with predatory open access journals is that “that the articles ... do not undergo rigorous peer review” (2018). Peer review is a stopgap to publishing bad research; without it, flawed research can be published and later, other authors could cite it unaware of the problem. In addition, some reports say that after some predatory open access journals accept an article for publication, the journal editors may inform the author of a fee (Pettit, 2018; Johnson, p. 130). Andrews quotes Dr. Jeff Clements who explains that “‘open access’ ... science is not what it seems” as seemingly legitimate journals “seek to exploit the open-access model to make easy money” by charging fees to publish articles without peer review.

Some open access journals are indexed in databases and discovery tools, which increases their accessibility. However, there are thousands of open access journals, which makes sustainably and thoughtfully managing them difficult. The difficulty lays in locating titles, evaluating them and their websites, making them accessible, and following up on access problems. Peggy Johnson emphasizes the necessity of collection development policies for library collections of all types (p. 83). She adds that online resources should be evaluated for open URL compliance and metadata availability (p. 127), which affect the usability of any online resource. Johnson adds that open access resources collection development “can be ... time consuming, ... [and] each library should decide the extent to which the benefits ... justify” the time involved (p. 147-148).

Problem

It is no secret that the print collections of academic libraries nationwide have been declining due to the need to reallocate space, budget woes, and annual cost increases for library materials. There is no arguing with the fact that open access has grown substantially over the years and new open access journals are springing up everywhere. They are published by non-profit publishers and commercial publishers alike, making scholarship more and more available worldwide. However, peer review and publication standards vary from title to title. While open access journals should not entirely replace subscription journals, they can supplement subscriptions. Therefore, providing access to relevant, peer reviewed, open access journals positively impacts the university community, as faculty and students may already be using them. However, due to the large volume of open access journals, locating them, evaluating them, creating access, and dealing with access problems may not be sustainable for some libraries due to the staff time involved. While some libraries may catalog open access journals, others may have a journal portal, marc records service, use a discovery tool, or simply provide links on a website. All of these are valid methods to provide access. However, it is more sustainable if the library uses an evidence based approach to locate, evaluate, select, and provide access to them. This article will detail one library’s experience with rightsizing open access journals.

Method

PSU’s Axe Library began a project to rightsize open access journals for the university community to access in 2017 after noticing issues that prompted changes in the library’s status quo in dealing with open access journals. The library’s method for the project was simple, but it took time to gather initial data and implement it. Then, the library continued to gather follow up data in order gauge the effect and whether the process should be continued. Documenting the initial and follow-up data served to prove that providing access to open access journals via the library’s journal portal, discovery tool, and

open URL resolver improves their accessibility. To begin the process, the library downloaded 2016 usage statistics from publishers and the library's usage statistics assessment tool. At that time, the only goal was examining subscription journal usage statistics.

In the case of PSU, the library noticed that there was high usage on a title that was not a subscription, which seemed odd. So, to test if it was a fluke or an isolated case and see what titles are being used most, the library copied and pasted the report into another spreadsheet, deleted the columns except for the title, ISSN, and reporting period total, and then sorted the report by most to least usage. The results were surprising; after investigation, the library found that the most used titles were a mixture of gold and hybrid open access journals as well as subscription. The gold and hybrid open access journals were not in the library's electronic resource management system (ERM), so they were not being accessed through the library but were being used within the library's internet protocol ranges.

After examining the usage data and evaluating the high usage open access journals for peer review, relevance to the university's needs, indexing, predatory open access journal characteristics, and the reliability of the websites, the library added some of the gold open access journals to the ERM. However, the library did not add any hybrid open access journals since only select articles are available. The library repeated this process with every publisher for which the library has subscriptions and usage statistics. In addition, PSU uses COUNTER statistics through its ERM vendor, where usage statistics of open access journals from various publishers is available. Many of the added open access journals are already indexed in databases to which the library has access, which makes them more accessible. In addition, the library also added new titles which had no recorded usage, but were relevant to the university discovery and scholarship needs. The library documented the open access journals that it added to the ERM in 2017, their ISSNs, and usage statistics for 2016, 2017, 2018, and 2019 (through June 2019). The library continued to add data and make calculations using the data to attempt to find out the percentages of added and updated titles on the usage statistics. The final version of the compiled data is available online and is listed in the references (Pope, 2019).

To find information on the journals to evaluate them, PSU'S Axe Library utilized publisher websites, Scimago, and the Directory of Open Access Journals. The publisher's website will sometimes indicate a journal's peer review status, as well as describe the submission and peer review process, and where the journal is indexed, but some do not. Academic libraries wishing to add open access journals to their collections should be wary of adding all open access journals or adding them without evaluation, as some are not peer reviewed or have predatory manuscript solicitation practices. Others may charge submission and publishing fees to authors. The author recommends searching for journals in the Directory of Open Access Journals, which lists the journal's peer review status, length of time from submission to publication, submission charge, and article processing charge. The "Principles of Transparency and Best Practice in Scholarly Publishing" criteria on the Directory of Open Access Journals website was developed by Committee on Publication Ethics, the Directory of Open Access Journals, the Open Access Scholarly Publishers Association, and the World Association of Medical Editors. Directory of Open Access Journals utilizes the criteria to evaluate journals in its database; those journals meeting the criteria are given the DOAJ seal, as indicated by a gold circle with the letters DOAJ on it. Currently, 1,319 journals out of a total of 13,491 journals have the DOAJ seal. Another reliable source is Scimago, which "combines ... indicators based on research performance, innovation outputs and

societal impact measured by their web visibility” and gives journals scores, which note the value of the journal’s influence and those that cite them.

Another issue arose when the library decided to discontinue marc records service for online journals. This decision was partially a budgetary decision, but also based on the knowledge that the library’s patrons primarily access online journal content through the library’s discovery tool, the open URL resolver, and the journal portal, not the online catalog. Before deleting the marc records from the online catalog, the systems librarian did a link checker report in the library’s online catalog and found thousands of open access journals whose URLs were not linking or were being redirected to other sites. After reviewing the report, the library found that many of the journals on the list had moved to other websites or disappeared and no source could be found. In addition, some were not relevant to PSU’s discovery and research needs. The library went through the list and deleted from the library’s ERM holdings the irrelevant journals and those whose websites were unreliable or no longer existed. The library fixed the URLs in its ERM for those titles which were both relevant and available from a reliable source. While discontinuing its marc records service was a good move from PSU’s Axe Library, it may not be for all libraries. The library has not noticed any negative effects as a result of discontinuing marc records service for its online journals.

Another issue the library wanted to address was due to cancelling a database subscription, the indexing of which was duplicated elsewhere. However, some of the full text content was from open access journals not duplicated in the library’s collection and the library wanted to provide access. The library added many of those open access journals to the ERM. Adding those open access journals to the ERM makes them accessible in the journal portal, the open URL resolver, and the library’s discovery tool. Other libraries may provide access to the journals in the online catalog by cataloging them, through a marc records service, or by providing links to them on a website. While PSU utilizes a commercial ERM, as well as a discovery tool to provide nearly seamless online journal access, the author notes that there are open access ERMs and discovery tools available.

The next obstacle to conquer was an excessive amount of overlap among the various open access journals databases the library uses, such as Directory of Open Access Journals, which aggregates open access journal data from many different sources, and also open access databases direct from publishers, among others. While in most cases, the overlap does not cause a big problem, having many links for the same journals, some of which go to the same URL, can be confusing for patrons who are not sure what to click on to access the journal.

To locate the extensive overlap more easily and sustainably, the library used the overlap analysis tool in the library’s ERM to analyze all of the library’s open access journal databases. The tool produces a report that allows the library to make decisions about what links to delete. The report shows the journal title, ISSN, and which of the databases in the comparison have holdings of the journal. Any library doing this report in an ERM can access the holdings data in the ERM and delete access for a journal title in a database.

As a result of running the overlap analysis report, the library found that many open access journals were in two or more different open access databases that all pointed to the same URL. Sometimes, the URLs for one or more of them were wrong. The library examined each title on the report and picked the source with the stable URL, updated the bad URLs, and deleted the duplicates. Eliminating excessive duplication and unreliable links also served to improve open URL linking, and possibly increase usage statistics. It has also eliminated some confusion of patrons in locating full text or having multiple links to click to access journals.

Data

In 2017, PSU added 236 open access journals to the library's ERM and updated the URLs of 111 other open access journals. PSU also tracked the usage statistics of the total 347 open access journals for 2017 and 2018. 51.69% of the added titles and 45.95% of the updated titles increased in usage from 2016 through 2018. Out of the total added and updated open access journals, 49.86% of titles increased in usage from 2016 to 2018. PSU continued to track usage of the original journals list through mid-2019. While the library only has usage data for some titles through mid-2019, out of the original open access journals list, 15.68% of the added titles and 10.81% of the updated titles increased in usage from 2016 through mid-2019. Out of the total added and updated open access journals, 14.12% of them increased in usage from 2016 through mid-2019. However, of the journals that had no prior usage and were added due to their relevance to PSU's discovery and scholarship needs, some were not used at all. PSU has continued to track usage statistics on the original journals list and has also created new lists of open access journals through examining usage statistics, evaluating them, adding them to the ERM, and tracking their usage. The final version of the original list of open access journals added and updated in 2017 is available online and a link is available in the references (Pope).

Discussion

Evaluating usage statistics for what journals are getting used that are not subscriptions proved to be a successful action that helped PSU's Axe Library to drill down to what open access journals to actually evaluate for possibly adding to the ERM. However, the library also added access to journals which had no prior usage, but were relevant to PSU's discovery and scholarship needs, or so it was believed, but some of them were not used. Therefore, the author has concluded that adding access to open access journals that are peer reviewed journals and seem to be relevant is less successful overall than following usage statistics as an additional predictor of future usage. PSU has continued to track usage statistics and has continued to seek out high usage open access journals, evaluate them, add them to the ERM, and track their usage.

Rightsizing is an evidence-based approach to shaping and molding a library's collections and service and will help academic libraries to shape and mold their collections and services to what is needed. However, Peggy Johnson emphasizes collection development policies are also necessary to give a general framework for making decisions about a library's collection. She likens not having a collection development policy to "businesses without business plans. Without a plan, the owner and employees lack a clear understanding of what the business is doing now and what it will do in the future" (83). The author is seeking to establish standard collection development criteria for open access journals to be used by libraries.

Conclusion

Rightsizing is an evidence based approach to shaping a library's collections and services to what is actually needed to support the university's discovery and scholarship needs. This approach helped PSU's Axe Library to not only use its periodicals collection budget more wisely, but also figure out how to expand access to peer reviewed, open access journals, many of which were already being used by the university community. PSU also used the data to delete those open access journals that were

irrelevant or whose websites no longer exist, and also update many bad URLs. The author submits that libraries should not add all open access journals to its collection, because not all are relevant to the university community and not all are of good quality. The costs of this venture are the time to evaluate open access journals and after selecting them, establish access through a library website, journal portal, discovery tool, open URL resolver, or online catalog. Other costs may involve a service, such as a journal portal, discovery service, marc records service, or links on a website.

For other libraries that may be facing similar challenges, this author submits that rightsizing the library's subscription and open access journals is a valid method to expand access to relevant and timely peer reviewed journals in order to better serve the university community. It is worth it for academic libraries to peruse usage statistics and other data on journals other than subscriptions; usage statistics help the library to zero in on titles to examine and increase the sustainability of the rightsizing project. Other factors, such as peer review, discovery, scholarship, predatory open access journal characteristics, indexing, and website reliability are factors that libraries should also examine. Article publishing charges that authors pay to publish articles open access are also a factor academic libraries may want to look at, but PSU has yet to do this.

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