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DigitalCommons Users Discuss the bepress Acquisition

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DigitalCommons Users Discuss the bepress Acquisition

Library Publishing Forum 2018
Minneapolis, MN
Tuesday, May 22, 4:00-5:00pm
Room: Memorial Hall

Presenters:

Paul Royster, University of Nebraska-Lincoln
Roger Weaver, Missouri Science and Technical University
Marilyn Billings, University of Massachusetts-Amherst
Phillip Fitzsimmons, Southwestern Oklahoma State University
Terri Fishel, Macalester College

Description: Since the acquisition of the Berkeley Electronic Press (bepress) by Elsevier last summer, there has been much discussion online, in listserves, and elsewhere about what that development means for the future of open access and scholarly communications. The people most directly affected are the users of the bepress DigitalCommons repository hosting service. Some have recoiled in horror at the new ownership situation, others are waiting to see what happens next. This is a panel discussion by current users concerning what they see in the road ahead, including what they regard as essential services, possible options, functionality requirements, and necessary safeguards.

Panelists agreed to limit remarks to approximately 4 minutes each to permit more discussion.

Roger Weaver

Scholarly Communications Librarian
Missouri University of Science and Technology
Rolla Missouri

1. Missouri S&T is a public university and is part of the University of Missouri System which includes MU in Columbia, UMKC in Kansas City, and UMSL in Saint Louis.
2. Missouri S&T has around 7,000 undergraduate students and 2,000 graduate students and about 370 faculty. We are ranked the 3rd best Engineering College by USAToday's College Factual and among the top 25 STEM colleges in the United States by Forbes.
3. As the Scholarly Communications Librarian my role is to provide support and services to our campus community in various areas such as scholarly publishing, research data management, and copyright. This includes advocating for and encouraging the use of open access options when they are practical and feasible. To that end we operate an institutional repository for our campus communities' research, educational, and cultural endeavors which includes scholarly and creative works, research data, and and other campus cultural materials.
4. Like many of you I was surprised and concerned at the announcement of Elsevier's acquisition of bepress.
5. I am here today to speak directly to the advantages that bepress service and support bring to smaller institutions such as Missouri S&T. Our library operates on a 2.8 million dollar annual budget. The vast majority of the budget goes toward maintaining our collections and staff. We are a small library with 8 professional librarians, 14 full time staff, and around 12 part-time student employees. We are understaffed and under-funded. We do not have in library IT and we receive minimal support from campus IT. Over the past 8 years we have operated in an environment of declining annual budgets and have been informed to expect flat or declining budgets for the foreseeable future.

6. We do not have, and will not have the resources in people, equipment and dollars to support an open-source repository platform on or own. The bepress suite of products which includes, DigitalCommons and the Expert Gallery Suite is for us an affordable, robust, and feature rich solution.
7. Equally important is the service and support we receive from bepress for no additional cost. We directly benefit from their accumulated years of experience and expertise. Expertise and experience which we could not afford otherwise.
8. Our institutional repository known as Scholars' Mine started over 10 years ago in a customized content management system provided by our campus IT. It had at that time about 10,000 object and less than 100,000 downloads annually. Due to cuts in IT services we moved to a shared Dspace platform with other University of Missouri institutions. This was not an ideal solution and for various reasons we left the shared Dspace platform about 3 years ago and choose bepress.
9. Today, Scholars' Mine consists of over 36,700 digital objects in over 192 disciplines. 67% in Engineering, 28% in Physical Science and Mathematics, and the remaining 5% dispersed among Life Sciences, Social Sciences, Business and Education. Our download counts exceed over 1 million annually. Our most recent success was last month when we became a CoreTrustSeal Certified Data Repository. None of this could have been achieved at my institution without bepress.
10. At its' core the bepress philosophy is one of service and support. This matches my philosophy that institutional repositories are not about the collections they contain but rather about the services a library can offer using these collections.
11. I remain cautiously optimistic that their dedication to a robust product, excellent service and support, and affordability will continue after the Elsevier acquisition. In fact, I accepted their invitation to serve on their advisory board in order to have a voice in creating such a future. So far, I see positive signs that they intend to strengthen their service model, their products,

and their dedication to open access while maintaining affordability through a restructured pricing model.

12. I would like to thank you for your time and I look forward to your questions and comments.

Marilyn Billings

Scholarly Communication Librarian
University of Massachusetts Amherst

The UMass Amherst Libraries joined bepress in July 2006, almost 12 years ago. We had conducted a needs and interest survey of our faculty prior to signing a contract, along with conducting a thorough investigation into the tools available at that time.

Advantages of our bepress Digital Commons instance ScholarWorks@UMass Amherst:

One stop shopping and one solution for many applications:

- ETD program with Graduate School
- Capture of community engagement scholarship to align with UMA's Carnegie Community Engagement Classification
- Open Access Journals
- Conferences
- More recently – book galleries, data
- Responsive staff at bepress (until more recently)
- Vendor supplied technology, backup of system, and related services

Training of faculty, other library staff, and series administrators goes across the entire platform, facilitating their use of multiple parts of the system. For example, if a team is using the journal functionality, it's an easy transition to start using the conferencing functionality.

Disadvantages:

- Templated system that is so scripted that it is hard to customize
- Newer forms of scholarship are difficult to include
- System inflexibility is not allowing local library staff to do more backend work (as had been possible early on as a bepress customer)
- Inability to use industry standards such as the SWORD protocol
- Promised functionality that hasn't been delivered

Using Digital Commons as the UMass Amherst institutional repository allowed us to hire additional staff in the Scholarly Communication Office.

- Digital repository and scholarly communication resident program
- Copyright and intellectual property librarian
- Digital projects & open education librarian
- New permanent Open Access & Institutional Repository librarian to administer ScholarWorks@UMass Amherst
- Acquisitions and scholarly communications librarian

Recent work in the Scholarly Communication Office:

- Partnership with the Open Textbook Network, use of Pressbooks, and participation in the OTN Publishing Cooperative
- Participation with the Office of Research and the university's implementation of VIVO

THE ETHICAL DILEMMA

With Elsevier's purchase of Digital Commons, it's time to broaden my thinking. With my values regarding open access publishing, being affiliated with Elsevier as our publishing tool is an ethical dilemma.

Things we've already done:

We've been educating ourselves, attending conferences, talking w colleagues

Trying not to overly customize what we have to enable easier migration

UMA libraries have been becoming more tech savvy through ILS migration

More code sharing w github, code4lib, and other locations than previously

Going from 1 tool to possibly 4 tools but yet on the same hand becoming more integrated w rest of campus --we can be seen as experts from past experience.

Positives to be gained from our experience to share with campus and be an engaged partner central to scholarship, research, and teaching & learning.

How have I done this work so far?

1. Meetings such as:
 - SLOAN funded Scholarly Commons workshop July 2017 at Indiana University
 - Visit to MIT's scholarly communication team August 2017
 - And this event!!

2. Articles such as
 - Roger Schonfeld: Red light, green light: aligning the library to support licensing, Aug 2017
 - David Lewis' The 2.5% Commitment, Sept 2017
 - Kenning Arlitsch and Carl Grant: Why so Many repositories? Examining the Limitations and Possibilities, Journal of Library Administration 2018
 - UC libraries "Pathways to OA:", meeting upcoming in Feb 2018

Needs for thinking and analyzing our work differently going forward:

More assessment

Determination of library's values

Are we serving the needs of our users?

Challenges faced by having so many repositories

What's working, what isn't - learn from that analysis and apply to needs for future research, text-mining, etc

Address needs of the Next Gen service for open, scholarly communications

Value of a "centrally-accumulated dataset"

What's the END GAME??

We have to position ourselves to be able to provide the Next Gen services needed by the academic community for open, scholarly communications.

Terri Fishel

Library Director
Macalester College
Saint Paul, MN

Brief background, Macalester College joined Digital Commons in 2005 when Proquest owned it. We had one specific need, to archive and make accessible our student honors projects - cataloged on OCLC and the most frequently requested items for Interlibrary loan.

As a small institution, we needed a hosted solution and not open source. We don't have the staff to manage open source products. After bepress took back control in 2007, DC was a small, customer focused organization with personal attention and superior customer support.

We progressed from archiving student projects to using DC to publish a scholarly society journal and move them from a subscription based model to an open access model. We grew to hosting/publishing 14 peer reviewed journals.

Our efforts are totally based on our values of supporting open access for scholarly output. We have always supported open access as a means to counter the commercialization of scholarly publishing inherent in Elsevier and other commercial publishers and we are proud that we can demonstrate that we dedicate more than 2.5% of our budget for open access initiatives. When we joined, We saw bepress as a partner in helping us make our scholarly works openly accessible , and felt their values matched our values. Small, personal attention, dedicated to open access.

So today bepress is owned by a conglomerate that is focused on commercialization of data and information. Elsevier and their holding company values are focused on making money, so currently vying for a commercial contract to use their product, LexisNexis to develop surveillance systems to support the work of ICE in deporting immigrants, is just one demonstration of why their values do not align with ours. (CRL Presentation *The LexisNexis Effect: The Metamorphosis of Critical Data Providers* Sarah Lamdan, Associate Professor

& Faculty Services Librarian, CUNY School of Law - <http://www.crl.edu/sites/default/files/attachments/events/S1%20p1%20Lamdan.pdf>

Elsevier has been openly opposed to open access and as Sarah Wiperman at Penn State has documented bepress values as expressed on their website have changed over time and after the acquisition by Elsevier no longer even refer to open access.

At our institution we discussed the Elsevier acquisition at the time it occurred and agreed that this did not align with our values and that we would look for alternatives. We gave ourselves three years and I was confident that a non commercial solution would develop. A solution that would align with our values and would be sustainable.

In a recent article “ [Why so many repositories?](#) ” (March 27,2018) Arltitsch and Grant point out the need for a common solution, that using some of our existing partners like OCLC we should be able to come together to find a common solution. Many will point out the need for local control, but in the same article they point out that it wasn't all that long ago that institutions managed their own email servers, but how many institutions do that now? Do we really need to have individual repositories? Are models like HathiTrust and OCLC examples we can use to develop a shared, community based, non commercial solution?

I think we can. Bepress began out of a need identified by a small group of faculty at UC Berkeley in response to wanting to do better than commercial publishers and support scholarly communication. 20 years later we need to take responsibility to work collaboratively to counter the commercialization and privatization of scholarly data and information and develop the infrastructure to support dissemination of the scholarship produced by our faculty and students.

Phillip Fitzsimmons

Reference and Digitization Librarian
Southwestern Oklahoma State University (SWOSU)
Weatherford, OK.

I am the administrator for the SWOSU Digital Commons at <https://dc.swosu.edu/>, and am happy to be on this panel to discuss our various customer responses to the Elsevier purchase of Digital Commons because SWOSU has been through this before.

Let me give some overview information about our institution. SWOSU is a regional University on the plains of Oklahoma an hour west of Oklahoma City. Our FTE is approximately 4,600 students. We have a nationally ranked College of Pharmacy, a big School of Nursing, and a strong Department of Engineering Technology, to name only a few. SWOSU has a long standing relationship with NASA that includes faculty research and many of our students getting internships with them over the years.

We have had an Institutional Repository for ten years and been Digital Commons customers for a little over two years. We have uploaded around 3,000 items and had over 50,000 downloads internationally. The collection includes all of our yearbooks, Student newspapers going back to 1984, with more on the way, faculty and student scholarly activities, three journals originating from SWOSU, and a variety of newsletters and institutional documents. We are also the digital archive for three external organizations: The DaVinci Institute Oklahoma's Creativity Think Tank, The Weatherford Arts council, and The Mythopoeic Society. We are also the digital archive of *The Mayfly Newsletter*, an international publication on Ephemeroptera research.

Previous to Digital Commons we used the Ebrary platform when they were an independent company. The platform was nice. It was affordable. The people at Ebrary were helpful and provided excellent customer service. The limitations of the platform were okay because our initial goal was limited to making historical items from our Southwestern Room available to the public. The platform was free and open to the public but had limited discoverability.

When ProQuest bought Ebrary changes occurred. Our materials were watermarked with the ProQuest name when printed and the pages were labeled as property of the company. Then users were limited to printing 60 pages. Finally users were limited to the number of pages they could view. At this point we began shopping for a different platform.

At about the same time, Astronaut General Thomas Stafford, raised in Weatherford, donated his archive to SWOSU. This meant we needed to up our game because he is a national figure and his collection needs to be discoverable and have open access to all scholars in the public. This led us to Digital Commons.

Digital Commons has been a beautiful platform. It looks wonderful and provides flexibility in how we present our materials, while the people at Bepress have been true to their word about providing unlimited training and customer service to us as administrators and the public we serve.

Admittedly, the acquisition of Digital Commons by Elsevier was a surprise and cause for concern. But SWOSU will continue as customers as long as they continue to provide the same service that we have had to the present. The only two red flags have been the secrecy surrounding the acquisition of the company and the recent slowdown of the platform on the administrator's side. So, for now, we are going to wait and see. So far, there has not been a repeat of our previous experience of things changing for the worse once the platform is acquired by a major company. We will continue as happy customers as long as they continue to keep their promise that our agreements and service will not change.

Phillip Fitzsimmons
Reference and Digitization Librarian
Southwestern Oklahoma State University,
Weatherford, OK.

Paul Royster

IR Coordinator
University of Nebraska–Lincoln
Lincoln, NE

The 4 S's

1. Software
2. Services
3. Separation
4. Strength

1. Software

In my opinion, bepress has the best software package for IRs. Their platform evolved from a much simpler online journals publishing system, that has been enhanced and adapted to a variety of repository functions. It works, and it is difficult for a user to break. Even a child can use it. Even an impatient scientist with rudimentary English skills can use it. Undergraduates become proficient in less than 15 minutes. Full professors can sometimes even make a complete deposit. It is easy to use and to learn, but robust enough to handle high-volume traffic. It is not often dysfunctional—and when it is, bepress adopts an “all-hands” approach, prioritizes core functions, and stays in communication. The system’s reporting and geolocating functions are marvelous and, to my knowledge, so far unequalled, with article-level metrics in real time. But lots of places can write software, and especially software that imitates other software. So, we will call this a plus for DigitalCommons, but we will not argue it is the only package *potentially* capable of doing this.

2. Services

Bepress is essentially a service bureau. We are contracting for their labor—both technical services and customer services. We get the expertise and benefits of their 15 years of experience and training. Bepress has always had really good people, and those employees have remained. They keep the system running, and they also handle the smallest most picayune requests from the furthest corners of the globe

from users of all skill levels. They understand that service—not content—is their business. Berkeley, California, is an ideal location, with access to a large pool of computer-savvy educated workers. Imagine converting bepress engineering and customer service to library jobs, and what that might entail. Imagine the job descriptions, the position classifications, the evaluation procedures, the reporting lines. And no one person could cover the range of services that bepress provides: sometimes it is debugging code, sometimes it is holding the hand of a first-time depositor.

3. Separation

There is no connection between the DigitalCommons and my university/library network, so there is no window or back door into privileged employee or other information. Hacking the DigitalCommons will yield only limited info, almost all of which was public anyway. On the other hand, running an IR off library servers could create potential pathways into library accounts, passwords, and university records, employment, tax, health, and other systems. The absolute separation of bepress servers from our university is better than a wall; it's an ocean. That is as it should be. All the traffic that goes through the bepress servers is no load on our local IT and is no threat to local security or privacy. And as a bonus, our sites are exempt from many local rules and regulations governing library or university web pages. If I had to build our IR through a local committee, we would still be in start-up.

4. Strength

“For the strength of the pack is the wolf, and the strength of the wolf is the pack.” (Kipling, *The Jungle Book*) The most valuable thing about the Digital Commons is its customer base. The fact that roughly one-third of all IRs share not just a platform, but a single service hub in California, just “down the block” from Google, makes an incredible difference. If all our content was split among 400 different installations, we would not possess the critical mass and influence that we have as an accumulated hoard. The downloads of Nebraska content help other DigitalCommons content climb higher in Google search results, and your downloads help ours. Your clever solutions and adaptations work for us, and ours for you. Other platforms might somehow replicate

the first 3 factors I have mentioned, but none would match the Digital Commons in aggregated content and gravitational pull. Content attracts more content. We represent 2.5 million articles. We are stronger and more successful because we are all together.

Paul Royster
University of Nebraska-Lincoln