Communicating Collections Cancellations to Campus: A Qualitative Study

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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.

Introduction

When big deal journal packages came on the scene in the late 1990s, some librarians were apprehensive about the potential implications and sounded the alarm. Kenneth Frazier[1] argued that libraries would be weakening their collections with many titles they did not want or need, and (perhaps more importantly) they would be "increasing our dependence on publishers who have already shown their determination to monopolize the information marketplace." Despite these warnings, the big deal subscription model became the norm. Now, decades later, the unsustainable inflationary pricing of big deals has caught up with academic libraries. The act of cancelling these bundles is now gaining momentum in North America and Europe. In late 2017, the Scholarly Publishing and Academic Resources Coalition (SPARC) launched a website that tracks big deal cancellations,[2] demonstrating that many academic libraries worldwide are at the breaking point and making these cancellations, including entire countries (such as Finland, Germany, and Sweden) and large library systems (like the University of California). Cancellations are broadly due to the dysfunction in the current scholarly publishing system including the hyperinflation of journal prices and the formation of an oligopoly of commercial academic publishers[3] as well as a desire to move toward transformative agreements that include open access article processing charges (APCs) for authors at the subscribing institution.

In Canada, academic libraries face an additional financial challenge because most subscription fees are invoiced in US dollars. The fluctuating value of the Canadian dollar affects libraries' purchasing power and makes accurate budgeting for collection purchases difficult. For example, in November 2007, the Canadian dollar rose to an all-time high of 1.1030 USD but began its

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decline in 2013 to a 14-year low of 0.6821 USD in January 2016.[4] In real terms, this means that in November 2007 a journal priced at 1,000 USD would have cost 906 CAD and in January 2016 another journal priced at 1,000 USD would have cost 1,466 CAD. This rapid decrease in the value of the Canadian dollar put extreme pressure on budgets at postsecondary libraries. Therefore, in 2015, several Canadian academic libraries were faced with an immediate need to cancel major subscription resources such as big deal journal bundles.[5] These unexpected cancellation decisions needed to be made quickly, which meant that many libraries were unable to undertake consultations or strategic communications on their campuses.

While the University of Saskatchewan did not need to make any significant cancellations at that time, we watched with sympathy and interest as the situation unfolded at other Canadian universities. Anecdotally, we heard about the angry reactions of faculty members regarding the loss of journal subscriptions. We also noticed that at some institutions these cancellations attracted considerable and often underinformed media coverage[6] and negative backlash from faculty,[7] specifically against the library. We wondered if library communications about the cancellations could help mitigate this backlash. To that end, we undertook this two-phase study 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.

Literature Review

Big deals include a large number of titles and provide what publishers would consider significant value for the cost. High individual subscription prices for core journals can also make the big deals attractive for libraries because they include all of the core titles as well as many more secondary ones, enabling libraries to continue to provide access to many journals for a set price. The proliferation of new journals, however, has made these packages larger over time—and more expensive—while not necessarily increasing their value to the institution, with libraries just acquiring a bunch of unused journals.[8] Frazier's[9] warning in 2001 was prescient: "The big deal is a dangerous game in which libraries face the all-or-nothing choice of paying whatever publishers want or giving up an indispensable resource."

Yet, nearly 20 years later, the big deal persists. Jonathan Nabe and David C. Fowler[10] attribute this tenacity to the big deal's perceived value by librarians, mostly measured in the number of article downloads, and fear of how the university community will react if these bundles are cancelled. This fear of negative responses from the campus emphasizes the need to investigate and discuss how libraries can communicate about the cancellation of big deals to alleviate backlash. To date, most of the literature has focused on assessment of quantitative data to determine which bundles to cancel.

Assessment and Cancellation of Big Deals

In the past decade, many studies have been published on collections assessment, serials cancellations, and the perils of the big deal. These papers commonly describe different methods of assessment, usually with a goal of budget reduction, and are usually quantitative in nature. The authors discuss how they compile, arrange, and manage data, and how they use the data to inform decisions at their local institution(s). Cindy Sjoberg[11] surveyed the literature and identified the most common data used to inform assessment and cancellation of big deals: article downloads, cost-per-use, overlap analysis (with print and/or electronic holdings), other

bibliometric data, and input from subject specialists. Alison Ambi et al.[12] used all of these data and collected subject specialist input through a faculty survey. Even though cost-per-use is acknowledged to be a flawed metric, it is also recognized as the "best single metric for analyzing big deal value."[13] Todd Enoch and Karen M. Harker[14] emphasized the value of extensive consultation with liaison librarians to identify priority journals before involving faculty from other colleges. Stéphanie Gagnon[15] blended both quantitative and qualitative data (in the form of feedback from faculty) and attributed half of the retained titles in the unbundling project to each type of data collected. Beatriz Hardy, Martha Zimmerman, and Laura Hanscom[16] outlined their team approach to collections assessment and cancellations and discussed how they built their strategies for analysis and gathered input from faculty. Deborah Blecic et al.[17] provided detailed instructions on what data to collect, how to compile it, and how to gather it together in a scorecard that allows for comparison of titles in a package or across multiple big deal packages.

Each study offers a unique perspective on the assessment of big deals and the implications of cancellations. Very few, however, discuss communication on campus beyond consultation with liaison librarians or faculty to help inform the cancellations and/or priority titles to buy back.

Communicating with Campus about the Cancellations

As noted above, most of the literature on big deal cancellations focuses on collection assessment techniques and case studies on how a particular library carried out a cancellation project. Within these articles there is often a paragraph or a short section on communicating the decisions with stakeholders. There are also some opinion papers on this topic but we could not find entire articles or any research studies on communications about cancellations.

Libraries often base their communications about cancellations on budgetary information, subscription pricing, and the data collected during their collections assessments. It is reasonably assumed that academics, who are generally data-driven within their own research, will see the logic of the library's cancellation decisions if they are provided with the evidence. Indeed, faculty do seem more willing to accept bad news if it is accompanied by data and evidence, but this does not necessarily preclude protests from anxious faculty. Librarians may still need to contend with strong personalities who may be resistant to change no matter what the evidence.[18] When communicating about the assessment process and resulting evidence, it is also necessary to be as transparent as possible, especially if there are any perceived or actual deficiencies in the data.[19] Transparency builds trust.

Assertively presenting evidence and data can signal librarian expertise, which in turn can inspire confidence in the message and messenger. As Jenica Rogers states, "we should collect data not only for assessment, but also to bolster our expertise, and to facilitate effective communication with our communities."[20] In the initial stages of communicating about cancellations, faculty often question the library's capability to make objective decisions. However, repeatedly focusing on the objective evidence and emphasizing balance and fairness in resource purchases can over the years improve the credibility of librarians among faculty.[21] A librarian's influence and reputation on campus can be developed in other ways too. As Mary Ann Trail notes, "of equal importance to presenting faculty with data are efforts to build personal relationships."[22] Although it is time-consuming to get out there in person and build relationships, it pays off in faculty being less likely to resort to public attacks on the library

and librarians when they are frustrated.[23]A librarian's personal credibility can provide support for data and decisions when it comes time to communicate about cancellations.[24] This is obviously a long-term strategy, since relationships and reputations take time to build.

Other suggestions in the literature include developing a communications plan with frequent, tailored messages targeting various stakeholder groups and including opportunities for faculty and student consultation and feedback.[25] Université de Montréal developed a comprehensive communications plan when they cancelled their Wiley big deal in 2015. The plan included a website, meetings with faculty units and other groups, articles in the campus newspaper, multiple opportunities for discussions at each stage in the process, and inclusion of faculty and students on a working group to provide recommendations on methodology for the analysis.[26] Enabling some input and involvement of faculty in the process ensures that they are invested in the decisions and that relationships with the library are maintained.[27] Gagnon[28] considered consultation of the campus community to be an essential component of the process because it brought stakeholders onside with the library, creating social cohesion that bolstered the library's negotiating position with publishers. Gagnon noted that "every effort was made to remind members of our community of their role in the scholarly publishing system."[29]

Intersections with Scholarly Communication Outreach

Exiting a big deal is a golden opportunity to educate faculty about how the current journal publishing market is unsustainable and what they can do to help in the transition to a more equitable and open system.[30] Many faculty are unaware of, or at least have never thought of, how the proliferation of subscription journals impacts library budgets.[31] They have also been shielded from the dysfunction of the current model because they generally do not pay for subscriptions and so have little knowledge of the exorbitant costs involved.[32]

When cancelling a big deal, Tony Horava[33] suggested a proactive communications strategy to explain the context in which the decision is made (in other words, the dysfunctional state of the journal publishing market). This is a crucial strategy that can "shift the spotlight away from the library and toward the major publishers and their pricing practices. It can signal to the entire university community that the library is taking a principled and practical stand on the non-affordability of scholarly literature."[34] Similarly, Jeanne Pavy urged librarians to reframe the discussion and "should try to present cancellation of subscriptions that are costly, restrictive, and a poor investment of limited campus funds as not so much the lesser of evils as a truly positive way forward."[35] Pavy further argued that it is the professional obligation of librarians "to advocate for effective forms of scholarly communication and to ensure preservation of the scholarly record."[36] Librarians need to take a stand against profiteering in publishing, and that is just what we are beginning to see in the growing trend of big deal cancellations.

Although many academic libraries are increasingly faced with the difficult decision to cancel big deal bundles, there is limited literature to guide them in communicating effectively with their campus communities about this situation. Many papers discuss the assessment techniques involved in making the cancellation decisions, and some case studies detail the experiences of particular libraries. Additionally, several opinion papers argue for the need to tie these decisions to the current dysfunctional journal publishing market. However, we could find no empirical research studies to answer the question of how best to communicate big deal journal cancellations so that the campus community supports the library. With this article we address this gap in the literature.

Methods

For this study, we chose to focus on Canadian Association of Research Libraries (CARL) institutions. This was for the practical rationale of establishing a manageable scope for the data collection and analysis. And, since the University of Saskatchewan is a CARL member, it made sense to focus the scope to similar institutions in case we ever needed to implement the findings in a cancellations project ourselves.

This study consists of two phases: the first is a content analysis of publicly available communications about collections cancellations posted on CARL member library websites; the second is semistructured interviews of CARL librarians responsible for communications about collections cancellations at their institutions. The institutions included in Phase 1 were not necessarily the same as those included in Phase 2, but the findings from the first phase informed the development of the interview guide for the second.

Phase 1: Qualitative Content Analysis of Documents

In August 2017, we visited each of the 29 CARL member libraries' websites (excluding the University of Saskatchewan) and searched or browsed for publicly available communications about any major collections cancellations that may have occurred in recent years. We collected 74 documents from 12 different libraries (see table 1). Libraries ranged from having only one document, often a webpage or LibGuide page, to multiple documents. One library was a clear outlier with 27 communications. If a CARL library does not appear in the Phase 1 results, it is because we could not find any relevant publicly posted documents.

Documents were usually webpages with information and rationale regarding the cancellation of a major resource. Often there were associated webpages or a presentation slide deck that we considered as separate documents. The criteria for document inclusion and exclusion are listed in table 2.

TABLE 1
Institutions and Number of Publicly Available Documents Analyzed in Phase 1

Institution	Number of Documents
Dalhousie University	3
Memorial University of Newfoundland	12
Queens University	1
Ryerson University	1
Simon Fraser University	1
University of British Columbia	4
University of Calgary	5
Université de Montréal	27
University of New Brunswick	3
University of Ottawa	11
University of Regina	5
University of Windsor	1
Total	**74**

TABLE 2
Document Inclusion/Exclusion Criteria for Phase 1

Criteria for Inclusion	Criteria for Exclusion
• Any communications that mention cancellations of library collections • Publicly available on current (as of August 30, 2017) library or university website • Communications created or shared by the library or created by campus publications but that involve participation of the library	• Off-campus news coverage • Anything that resembles a title list • "Business as usual" type of communication about collections • Policy statements • Campus newspapers (including student newspapers) that are reactionary or opinion pieces and do not involve participation of the library

We saved each document as a PDF in a shared drive; those in French were translated into English with Google Translate first and then saved as PDFs with the others.

Each of us read all 74 documents and developed rough descriptive codes then came together to discuss and agree upon the codes. Once we had applied the codes in an initial sample of 12 documents as a test, we finalized the codebook and used qualitative analysis software NVivo to independently code each of the 74 documents. After all coding was complete, we came together again to discuss our observations and group codes into themes. We eventually agreed upon five themes.

For both phases of this study, we followed qualitative coding methods to understand and interpret the rich data gathered but stopped short of trying to achieve intercoder reliability. As Saldana[37] notes, some researchers question the utility of intercoder reliability, preferring to rely on consensus and intensive group discussion. This was our approach.

We consider Phase 1 of this study to be foundational and exploratory. The findings from this phase served as the basis for our understanding of the topic and informed development of the interview guide for Phase 2.

Phase 2: Semistructured Interviews of Librarians

For Phase 2 of this study, we built upon the broad knowledge we gained in Phase 1 by speaking with librarians responsible for communications about collections cancellations at their institutions. We developed an interview guide and tested it with a local collections librarian familiar with the study topic. After some adjustments based on his feedback, we submitted the guide along with a participant recruitment plan and associated forms to the University of Saskatchewan Behavioural Research Ethics Board. Phase 2 of this study received ethics approval on May 31, 2018 (Beh-REB 18-153).

Participant Selection

We identified potential participants at CARL libraries through their online profiles and activities and our own knowledge of the (relatively) small community of academic librarians in Canada. Using a purposive sampling technique, we focused on individuals with collections responsibilities and preferably some indication of administrative duties too with the assumption that they would have some strategic input into how their library communicates with its campus community. We invited them to participate through email. Additional participants were identified through recommendations of these initial contacts.

We did not attempt to recruit interview participants directly in relation to the documents collected during Phase 1. This would have been too logistically challenging and possibly limiting by excluding potential participants whose libraries have since removed public communications from their websites or who communicated in ways that did not meet Phase 1 criteria. It would also become too cumbersome to try to tie a participant's comments back to actual documents—especially since individuals we spoke to might not be the same as were involved in producing the specific documents. As it turned out, some participants had changed institutions during the years since a cancellation project at a previous library (though they remained at CARL institutions). Therefore, we focused on each participant's experiences on the topic irrespective of the institution at which they were. In all, 17 librarians from across Canada agreed to participate in this study.

Data Collection

During July and August of 2018, we conducted 17 interviews using the interview guide included as the appendix. The semistructured style of interviewing allowed the most flexibility for us to follow up on interesting anecdotes and dig deeper into possible topics of interest. It is also a format most like a natural conversation that we hoped would put the participants at ease so as to discuss potentially sensitive situations as well as facilitate their recollections. The interviews were all conducted and recorded through WebEx online video conferencing software. We all attended every interview session with one of us (D.D.) playing the role of primary interviewer while the others took notes and interjected follow-up questions as needed. All interviews were conducted in English and lasted between 40 and 60 minutes. Recordings of the interviews were then transcribed and assigned a unique identifier from P1 to P17 for anonymity.

Data Analysis

As in Phase 1, we developed a codebook after some preliminary reading of the transcripts and each coded the 17 transcripts independently. We used an inductive method of coding in NVivo, as described by Virginia Braun and Victoria Clarke where descriptive codes emerge directly from the data.[38] We sorted these codes into categories and finally into themes.

Results
Phase 1

As described in the Methods section above, we performed a qualitative analysis on the cancellations communications documents collected: we each independently coded the documents and came together to interpret the meaning of these codes. We discovered five prominent themes across the 74 documents.[39] These themes are summarized in table 3.

TABLE 3 Phase 1 Themes	
Theme	**Summary**
Stewardship & Reassurances	Providing reassurances to the campus community: • the library is a careful steward of the budget and has expertise in managing collections • there are alternate access methods for content that has been cancelled (such as interlibrary loan) • the library collection is still strong • all libraries are facing these challenges; we are not alone
Education & Justification	Providing detailed information to help explain and justify the cancellations. We referred to this as "the recipe" because it was a common set of topics that most institutions covered in their communications: • CAD/USD currency exchange challenges • unsustainable annual price increases from publishers • decreased purchasing power • explanation of the jargon (like big deal, perpetual access)

TABLE 3 Phase 1 Themes	
Theme	**Summary**
Transparency & Assessment	Sharing criteria and information that demonstrate the reasons for the cancellation decisions and requesting feedback: • data and evidence to support cancellations, usually quantitative (such as usage data, cost, cost-per-use, overlap) • most communication was unidirectional—from the library to the campus—but often provided a mechanism for feedback • consultation of faculty and students was common, often through liaison librarians or a survey of journal title lists • collaboration through inviting faculty and students to participate in working groups to make cancellation decisions was evident at only one institution, Université de Montréal
Vocabulary & Tone	Noticed interesting vocabulary and the "tone" of the messages: • some examples of both very polite and more dramatic vocabulary • tone was calm and straightforward
Open Access & Advocacy	Very little advocacy for change evident in the documents: • little mention of open access or the need to transition to a new and more equitable publishing system • only Université de Montréal took an advocacy position by focusing on the unsustainability of the current scholarly publishing market and encouraging faculty to take action

The Université de Montréal (UdeM) was a noticeable outlier among the institutions included in Phase 1. Their strategies differed from the other institutions, as outlined in table 4.

TABLE 4 The Outlier: Université de Montréal
UdeM's approach was unique in a number of ways: • ***Volume of communications.*** The number of documents found: 27. This is more than double the next closest institution at 12. • ***Outspoken advocacy and leadership by the University Librarian.*** Richard Dumont published four in-depth articles in the campus newspaper in October 2013 before the cancellations. In straightforward language, these articles focused on educating the campus about the root of the problem: the oligopoly of the major commercial publishers and the unsustainable pricing of journals. • ***Strong advocacy efforts and risk tolerance.*** UdeM repeatedly and directly encouraged faculty authors to take action to change the system by, for example: retaining copyright, not publishing in for-profit commercial journals, and contacting publishers to voice their concerns (email addresses of publisher representatives were posted on the library website). • ***Significant involvement of faculty beyond just providing feedback***. The library invited faculty and students from a variety of disciplines to participate on a working group that would develop a method for deciding which journal subscriptions should be retained. This included high profile faculty advocates/champions such as Vincent Larivière, who likely brought substantial credibility, attention, and bibliometric expertise to the project.

Phase 2

In all, 17 librarians from across Canada participated in the semistructured interviews for Phase 2 of this study. As in Phase 1, we performed a qualitative analysis on the data collected. We each independently coded the transcripts from the interviews and came together to interpret the meaning of these codes. We then assembled them into the themes discussed below with quotations from interview participants that help to illustrate the themes. While six substantive themes emerged from the data, we also heard a range of discrete advice from each of the participants that did not rise to the level of a theme.[40] This practical advice is presented at the end of this section.

Theme #1: University Librarian's Leadership and Involvement

"Have someone in your court, the Dean or UL, who can really be a very strong communicator and understand how to mobilize allies and really express the library's interest in really compelling terms is really really important in a campus wide situation that's very politically charged." P10

The dominant theme that emerged from the interviews was the involvement of the University Librarian and how this impacted the communications around cancellations. We did not ask a specific question about the participation of library leadership, but interviewees often spoke of the role of their University Librarian. We heard of various communication styles, including leaders whose communications were low key, those who were very hands on, and some who were the driving force.

"…we had a different university librarian who had a very different communication style and we really engaged in more selective communication." P4

"So that really started with meetings with [the University Librarian]. And it really was—We really had to have his sign off. So we weren't free to—Well essentially he became the point person for all communication and whatever." P12

"I think [the University Librarian] was really ready in his mind, he really knew, was someone who really knew where he was going." P3

The University Librarian's active involvement with senior university administration resulted in these administrators having a good understanding of the issues and challenges around currency exchange, inflation, and the challenges in the scholarly publishing market. We heard that these conversations needed to start early to ensure support for library actions and that these messages needed to be repeated over time to help the university administrators understand the complex issues.

"Like I mean it was great that [the University Librarian] was able to have those conversations at the high level. The Deans and the Chairs were already speaking the language that we needed them to when they spoke to their faculty, right?" P8

"I think trying to get the message out at the top and really having somebody who's willing to kind of do a good job explaining the realities of economics. I think at that level it's very very helpful. Because I've had people in subsequent meetings [say], 'Oh you know [the University Librarian]'s always saying at our meetings, you know, about the inflationary costs or the low Canadian dollar.'" P9

The University Librarian's relationship with the Provost was also very important. Support from the Provost was mentioned several times with respect to their understanding of what was happening and what the library needed to do to deal with the challenges they were facing such as cancellations, exchange rates, and budget cuts.

"…the critical link is between the Provost and the UL. And it doesn't matter. The rest of the communication strategy doesn't matter if there isn't constant good relations at that level. Because you need the Provost to go to bat for you and you need the University Librarian to be open, honest, frank, with the Provost. So the Provost knows when these things are coming down the pipe." P2

The issues are complex, and, not only did some University Librarians use their position within administration and their relationship with the Provost to influence senior university administration, but they also made the best of their strong communication skills to get the messages across.

"And credit to our University Librarian who did an excellent job of explaining to the central administrative committee and the Senate what these issues meant and to really explain them in enough detail that they understood it." P10

"[The University Librarian] is a very good communicator. She keeps them very much up to date with things that are happening at the libraries, of course at a higher level. They don't need details, necessarily." P8

Relying on this communications channel alone, however, was not sufficient to ensure the message was heard and understood by others on campus. We heard a few stories where deans did not pass on the information to faculty in their colleges. Therefore, the more successful communications plans combined several approaches, and support from senior administration was one key piece of the puzzle.

"Oh another means of communication is from the University Librarian to the Deans group. And in theory that's supposed to trickle down from the Deans to the department heads to all the faculty. In theory [laughs]. But it doesn't always go according to plan." P11

"…and really make sure the communication is from the top to the bottom and back up again. It really needs to be at all levels. As I said earlier, knowing right off the top that we had understanding and support from senior administration and from Deans and Chairs: That was really helpful." P8

Theme #2: Relationships and In-Person Interactions
**"…but really the success I think is happening based on ongoing relationships
and conversations" P14**

Participants spoke of communication methods regarding cancellations that were both successful and unsuccessful. Several participants spoke of the importance of in-person communications and relationship building across campus, which built trust and credibility over time. Participants suggested that the library think about how it might include information about cancellations as part of its ongoing communications instead of using the cancellations as the only time the campus hears from the library. They explained that communication regarding scholarly publishing was not a one-shot deal and that sending mass emails was not a successful way to share this information and build an understanding of the issues.

> "Because we found that when we sent the email out it didn't get read. There might have been errors in the distribution list. Some people didn't know what to do with it. Other people said, 'Oh I didn't know I was supposed to send it on.' And we can't guarantee everyone is going to read it." P13

In-person communication took different forms and all were seen as useful. Open sessions or town hall meetings—where the library made a presentation and then answered questions—were ways to publicly demonstrate the library's transparency in discussing these issues. Some participants also went to faculty council meetings and other university-level meetings, and others met with faculty members one-on-one. Generally, in-person communication seemed to defuse anger and reassure faculty.

> "…even though there was a lot of sort of immediate reaction and blasting emails and angry phone calls, in every case…As soon as we sort of talked about the issues [in person], the conversation changed entirely…" P14

> "And so we had been meeting regularly with that faculty's library committee once a month/once every two months. And we were explaining things to them in great detail. And there was a very good dialogue with that particular faculty. And it was very little blowback from them. And they weren't happy—don't get me wrong. They were not pleased about the cancellations, but they understood the process well enough that they could—You know, they understood why we were having to do it. They were certainly not happy. [Laughs] But they didn't respond in the way that the other faculty [did]." P11

All participants mentioned involving liaison or subject librarians in the communications, which was a way to take advantage of existing relationships to share information. We did not interview any liaison librarians, but the participants felt that they were able to tailor the messages for the different departments and maybe even for different faculty members. Most participants also noted that this approach could be uneven and difficult to assess. Some also

felt their liaison librarians would do better with more training or coaching about scholarly publishing issues and could develop better skills in communication, negotiation, and diplomacy strategies.

Theme #3: Stewardship & Expertise

"So the conversation is a little bit different than it was before. It's not around cancellation. It's around 'We want to make sure that we're expending the budget in the best way possible.'" P8

In Phase 1 of this study, we found that libraries often included statements and examples in their communications demonstrating their effective stewardship of the collections. We interpreted this as an effort to convince faculty that librarians have knowledge and expertise in collections management and can be entrusted to make these difficult cancellations decisions. In the Phase 2 interviews, this theme emerged again. Initial communications about collections cancellations with colleagues in the library or faculty on campus were described as foundational and important for building credibility.

"And gradually, as we explained things and explained things and went into more and more detail, eventually they were able to sit back and go, 'Yeah, that's a problem isn't it? There's no way you can buy all that stuff, can you?' It was just kind of a disbelief that we knew what we were doing." P11

"…they jump all over you about whatever, this or that or 'couldn't you get together with other libraries and get better deals?' Well yes actually we've thought about that, but. But really eye opening right? As long as people have what they want, they're happy. But it's completely invisible to them how it happens." P14

Demonstrating knowledge and expertise shows that the financial implications are well understood and the library has collection management under control. This stewardship was described in different ways, such as sharing quantitative data and regular meetings with and presentations to faculty. Participants also talked about reframing the focus from cancellations to collection management and stewardship.

"And we've earned a lot of credibility by repeatedly going to them and saying, this is what's happening, this is why it's happening. And the explicit feedback we're getting is that it's exemplary of what they'd like to see happening from other units on campus." P17

"We've been more careful with the communication now, in that it's not about a cancellation project anymore. It's about making sure that our acquisitions budget is spent in the best way possible and that it's best supporting the researchers and the instructors at the institution." P8

Continuous assessment and evaluation of the collection is important. Having this data available at any time ensures the library is ready to respond quickly to unexpected budgetary

challenges. It also increases transparency, demonstrates expertise in the library, and helps build trust in librarians' expertise.

> "I take responsibility for that, you know? So that needed to be upfront, like, yes, we have to make these decisions. They're tough. But we have a process. We're going to be thoughtful about it." P5

> "I think one of the things is don't wait for the crisis situation to start having this kind of information readily available. We should be just having it up all the time and be ready to go." P16

Theme #4: Internal Library Communication
"We discovered fairly early on the communications were really about talking to the librarians." P15

One of the first steps for successful communication highlighted by several participants was to make sure everyone in the library, even the student casuals, understands the cancellations underway—the scope, reasons, and how to redirect queries. Building trust within the library ensures that the library speaks with one voice and is seen as trustworthy when communicating to others on the campus.

> "…we did realize that going forward, we cannot move in this project unless everybody is saying the same thing to faculty and unless everybody's on board." P15

> "But when you're talking to faculty or students, you have to present a united front as much as possible. That's really really important to present a common front. A common message to show solidarity." P10

> "I spend a lot of time presenting what the project was, how we were going to go about it, coaching folks, answering questions internally to build trust that nobody had lost their minds." P17

A few participants mentioned that involving liaison librarians in assessment activities and ensuring that they understood the process from the inside helped to build internal trust in the project. The role liaison librarians played in communicating to their departments is mentioned above, but participants also identified the importance of preparing liaison librarians for this role and ensuring they felt supported in those activities as important groundwork.

> "One of the things I promised the librarians is nobody has to go in naked." P17

Ensuring that liaison librarians had both the background information about the project and the confidence to speak knowledgeably with faculty were two key elements discussed by participants. Liaisons need the data and the story to take to their faculty, they need to sup-

port the library's position, and they should trust in the work that the collections librarians have done. Often participants discussed providing draft emails or template slide decks that could then be modified by individual liaisons to better meet their own communication styles. Providing mentorship and support about issues around the scholarly publishing market and collections assessment for liaisons was identified as important for capitalizing on the liaisons' existing relationships in order to communicate with faculty.

> "So we did try to establish some constancy, but not draconian consistency." P11

> "Don't try to use a one-size-fits-all approach because people who work in different disciplines have very different ways of—very different relationships to data and evidence. So really capitalize on liaisons who understand those disciplines and how they function." P11

> "…it was hard to mobilize the librarians to actually go and have those conversations. It's because I don't think we provided them with quite enough tools and information in order to have those conversations." P8

Theme #5: The Intersection of Collections Cancellation Communications and Scholarly Communication Outreach
"Why waste a crisis?" P6

The notion of tying the broader problems in the current scholarly publishing system to the cancellation of journal collections was a strong theme in the interviews. The sentiment was that the crisis the library is facing is an opportunity to educate about the problems in the system. We did ask directly about this topic in the latter part of each interview, but by that point most participants had actually raised the topic on their own—and some spoke about it at length unprompted.

The interview question we asked was essentially this: "What is the library's role in educating their campus community about the dysfunction in the current scholarly publishing system?" Often, the immediate answer was that it is an important or even critical role of the library.

> "I think it's quite crucial. Because not only is it an opportunity, but I think it's our responsibility as well because I think of our role as managers of public funds. I think we have a fiduciary responsibility to inform our public, our community, that there's a real problem in its functionality. And to try to educate, as best we can, the broad strokes of what is wrong with the current system, how it functions, and to discuss alternatives." P10

> "I think it's a key responsibility and key opportunity for university libraries." P1

> "I think we have a huge role to be constantly keeping them aware of what is this environment we're living in. And if they have a better understanding, then they understand why we are forced to do what we need to do. Right?" P16

Although this interview question generally elicited a response along the lines of the quotations above, we also sensed in a few cases a potential disconnect between collections librarians and scholarly communication librarians. For example, some participants immediately started speaking about their scholarly communication librarians and the various library initiatives that supported open access publishing (author funds, institutional repositories, etc.), but did not tie the issues in scholarly communication to their cancellations communications. This could have been a problem with clarity in how the question was phrased, or there could be a real issue here that requires further investigation. Are some collections librarians and scholarly communication librarians working in silos when they could be collaborating more productively on this problem?

The unsustainable scholarly publishing system is one of the key factors driving the need to cancel journal collections. Some participants made this connection on their own.

> "So I think it's quite crucial actually because we see that scholarly communications issues and collections issues are really dovetailing in many ways." P10

> "Exiting from a big deal is a great opportunity to highlight the problems in the system; educate faculty." P13

Some participants expressed frustration that these issues are commonly seen as "library problems" by faculty and therefore don't get much attention. Faculty often do not see their role in perpetuating this system that has ultimately resulted in the collections cancellations that they are now experiencing.

> "So really moving the discussion away from, 'Here's the library coming to you with a library problem' to, 'Here's the library presenting you with an issue that we all need to be a part of.'" P13

A few participants in the study went a step further and spoke passionately about the library's potential role in driving change to a more sustainable and equitable publishing system by educating members of their campus community. Faculty hold considerable power in the current system, whether they recognize it or not, so they were the focus of participants' advocacy and outreach schemes.

> "I think that is one of our key roles in terms of providing that information and trying to educate our faculty and do what we can to influence change." P12

> "We're going to perpetually have these issues if we don't do something differently. And so talking to faculty about how can we sort of change the model." P1

Once again this brings up the question of the role of the library. Is it simply to be the provider of books and journals like many library users believe? Or should libraries have broader missions that could potentially be just as vital to the academy… such as facilitating the transition to a new publishing system?

"To actually offer those kinds of services or talk about that or even have librarians with that kind of knowledge. So we have a lot of work to do internally. But I think if we want to survive or be relevant to the university and not just like the place where they buy all the journals and books, we have to think about—And I think that communication is a major factor in all of that." P15

"I mean really what we're saying is, it's our job to transform scholarly communications; that's part of what libraries' job is. I mean if you go back to CARL a number of years ago came out with that. It's just libraries can't transform the system because we're only part of the system. We're trying to say if universities exist to disseminate knowledge and we have these knowledge dissemination channels that are open why aren't we using them?" P14

Transforming the current scholarly communication system to a more equitable model is obviously a massive undertaking and cannot be done alone by any one academic library. Leadership, collaboration, and resource sharing at the national and international level is required.

Theme #6: National Leadership, Resource Sharing, and Emotional Support
"Let's not simultaneously work on the same problem." P15

The unsustainability and dysfunction of the current scholarly publishing market is a huge international problem, not something that can be tackled by one institution alone. This was a common sentiment when the participants spoke of scholarly communication and its connection to big deal cancellations.

"I think that really what we have to have is an overall strategy put in place. And the longer that I …[am] confronted with [this problem], the more I realize that it's a coordinated message and strategy that can't just be done on one library or one institution's campus." P6

Some participants expressed a desire for more national collaboration so that libraries are not all reinventing the wheel at each institution; whether that be in scholarly communication education and outreach resources or collection assessment strategies and tools, or the intersections between them. Several participants gave credit to the Canadian Association of Research Libraries (CARL) and the Canadian Research Knowledge Network (CRKN)[41] for examples of their national leadership on these issues already.

"I like it when CARL libraries share kind of resources and strategies and data… CRKN has a tool kit, CARL has a tool kit, but any of the sort of shared resources I think are really good and really helpful for key messages. Instead of reinventing the wheel. So it's kind of like if we can take national things and then localize them for our own community…" P14

> "CARL has shown great leadership in making lots of relevant information available to library directors, that we can then go out and take that raw material and massage it, and present it at our own campuses…" P7

Adapting messages and resources to the local context is key. Some participants acknowledged that, although sharing resources and strategies sounds great, each CARL library is a unique entity based within a distinctive campus community. The local culture, historical context, and demographics of each institution need to be taken into consideration. What works at one institution might not necessarily work elsewhere.

> "It makes it hard to come up with a common communication strategy for everybody if we're all in such different circumstances." P2

Although the details of the local context at each library are unique, there is enough commonality in the overall situation that some participants expressed relief when they were able to commiserate with colleagues at other institutions. While sharing resources and strategies is important, emotional support is also necessary.

> "Yeah, I'd like to say that it's really been helpful to have conversations with people at other libraries that are going through similar processes. Because …we didn't feel like we were quite so unique in what we were going through." P11

Librarians are generally strongly service-oriented—their primary purpose is to support the information needs of their constituents. Cancelling access to resources is not something they want to do, but many factors beyond their control require them to do this. It is then especially difficult to be the target of angry reactions from faculty. And despite all that a library has done to stave off the cancellations, and all they are doing to make cancellations in an evidence-based way that will have the least negative impact, there will still be angry people.

> "I think you just have to resign yourself to the fact that there are going to be angry people. Even if you do everything you can possibly do, you're not going to be able to come out of it unscathed. And that doesn't necessarily mean that you haven't done your job or haven't done it well." P11

The stress and emotional labor of librarians involved in these decisions was evident in many of the interviews, but only one participant spoke directly of the toll of this process.

> "It's probably the most challenging thing I've had to deal with. I can't think of anything more challenging in my tenure here. It's extremely stressful and difficult at times. Just because so much is on the line. And there's so many variables out there you can't control. So it's really very very—You can't let others see that side of it. I didn't let most of my colleagues see that. I kept that." P10

We hope that the data gathered in this study and assembled under these six main themes will help guide librarians in developing their own unique communications strategy that fits their specific local situations.

Practical Advice
   "Do the best you can and don't be mortified if you don't achieve perfection." P11

      Beyond these broad themes, we also collected the common practical advice that we heard from participants that was effective but did not fit into the six broad themes already defined:
- Start communicating as early as possible and provide regular updates.
- Avoid raising alarms over a crisis, but provide enough time to prepare and plan communications in a thoughtful way throughout the process.
- Use different channels (like faculty councils, email, town halls, library website) and adapt the messaging for different disciplines and different types of audiences (such as students, faculty, deans, senior administration, and library staff) to help meet individuals' unique communication preferences and needs, and spread the message wider than a single message in a single medium.
- Be clear on how feedback will be used and what input you need.
- Be transparent, clear, concise, and consistent.
- Keep a record of ongoing communications and post them publicly in a single, easy-to-find place to direct stakeholders to.
- Ensure that decision-making data and ongoing messages are publicly accessible and easy to find.
- Share evidence such as actual costs (as permitted by licenses) and inflation rates, since people outside the library are often surprised by this information.
- Try to simplify messages as much as possible, perhaps by just providing key points and linking to background information.
- Keep the tone of communications calm, straightforward, authoritative, and professional.
- Develop and use a communications plan.
- Use the messaging to educate and inform the campus about other library services (like interlibrary loan).
- There will never be an ideal time to solicit feedback from faculty.
- Even with the most detailed and well-executed communication plan, your messages will never reach everyone.

Discussion
Several concepts emerged from the themes that warrant discussion and perhaps further exploration. In particular, the lack of awareness on campus of librarians' expertise, the evolution of the conversation about scholarly communication and advocacy for change, and the necessity for librarians to engage with faculty about the state of scholarly journal publishing.

Building Relationships and Credibility
Participants often struggled with their communication with stakeholders. Back in 2015, many were unable to communicate in a timely manner due to the sudden drop in the value of the Canadian dollar and the need to cancel journals quickly. Others felt that their communications

were thorough but were still met with outrage from faculty and sometimes misinformed media coverage. This topic is complicated and the campus audiences often ignored email messages, misunderstood why the cancellations were necessary, and did not have confidence that the library was managing the collection and budgets effectively. While faculty could be forgiven for not reading their email or not understanding the complexities of scholarly publishing, the depth of mistrust and misunderstanding of librarians as professionals is frustrating.

Those of us in the library know the high level of expertise brought to these collection decisions, and this is also well documented in the literature.[42] But others on campus are not aware of this, and they may not fully trust the library to do this work. We heard stories from participants that outlined how uninformed the campus community was of the professional work undertaken in the library. There are university administrators who do not realize that the library knows how to manage a collections budget and faculty members who have no idea of the expertise required to negotiate contracts and manage online collections. Some faculty offer up suggestions like working with other libraries to get better pricing, which of course libraries have been doing for years through consortia. Trail discusses a difficult process of canceling print titles in favor of electronic format where "librarians searched for ways to … prove to faculty that the cuts were not capricious and fickle,"[43] which seems to sum up what we heard from some participants.

The Phase 2 interviews, however, provided us with insights on how to increase the credibility of the library's decisions. Participants spoke of spending time up front building relationships through face-to-face interactions. Meeting with faculty and administrators over time can help in several ways. It can increase the trustworthiness of librarians' expertise so that faculty do not so easily question their knowledge and capability to make these cancellation decisions. This outcome is highlighted by Rogers, who stated that "you have to start gathering your resources now … building your relationships in context, and demonstrating your expertise, so that when you reach your point of need, you have as much as possible available to support you."[44] Participants also suggested that having a personal relationship with a librarian might temper harsh criticism of the library by faculty. This echoes M. Brooke Robertshaw, Michaela Willi Hooper, and Kerri Goergen-Doll, who concluded their overview of the importance of faculty involvement in decision-making by saying "it takes time, resources, and patience to build bridges and learn from one another intentionally and purposefully."[45]

Aversion to Advocacy for Change

We found a disconnect in the results between Phase 1 and Phase 2 in the area of advocacy for open access and support for change in the for-profit academic publishing model. In Phase 1, other than a couple of notable exceptions, there was a distinct lack of advocacy in the documents, and the tone of communications was quite measured. During the interviews, this measured tone was absent when we talked about issues in scholarly publishing; instead, many participants supported the need for advocacy in this area.

We speculate that there are several possible reasons for this difference between Phase 1 and Phase 2:

1. Since 2015, when most of those Phase 1 communications were written and published, two related issues have emerged in more mainstream conversations in librarianship: questioning the neutrality of libraries as institutions and the growing acceptance of librarians' responsibility to call out profiteering in publishing. This increased awareness

may have influenced the responses to the questions about scholarly communication and advocacy in 2018 in ways they did not influence communications in 2015/2016. This increase in awareness is not limited to librarians; as faculty learn more about the oligopoly of academic publishers and the dysfunction in the journal market, they may be more receptive to messages about reforming the system.

2. The participants may have felt more comfortable and able to speak freely in "private" (that is to say, in the anonymous interview format) with fellow colleagues in their profession than they may have/do in more public forums with campus stakeholders.

3. Library communications around cancellations tend to be managed by several people. While some may have wanted more advocacy to be included, others may have been more conservative in their views or had other reasons for not wanting to address systemic problems in scholarly publishing in the messages about collections cancellations.

Not Just a Library Problem

As some participants noted, this is not just a library problem. Library collections issues are intimately tied to scholarly communication issues. If there isn't a systemic change in the journal publishing market to a more sustainable model, then libraries are going to keep repeating this cycle of subscription cancellations. Communications about a big deal cancellation may be the ideal opportunity to illustrate the problems to faculty and university administrators.

> "The serials-cut discussion can provide a concrete, vivid context for serious dialogue with faculty and other campus stakeholders about the need to reform scholarly communication and take steps toward a more sustainable future. The painful budget-cut process provides an opportunity to recast short-term losses into a long-term strategy for a more sustainable scholarly publishing and distribution model."[46]

Faculty are authors, reviewers, and editors of these journals and need to be partners with the library in promoting this change in the system, but often they are not fully aware of the severity and extent of the problem since they have little to no involvement on the financial side. Librarians have always dealt with the subscriptions on their behalf. So, librarians have a *professional obligation* to be more outspoken advocates for scholarly communication change by raising awareness on campuses. This likely involves the need for collections librarians and scholarly communication librarians to collaborate more closely in the years ahead.

Conclusion

We undertook this two-phase study to discover strategies for communicating to the campus community about collections cancellations so that they might better understand and support the library in making these difficult decisions. Phase 1 of the study was a content analysis of publicly available communications about collections cancellations posted on CARL library websites. This phase was foundational and exploratory, and the findings served as the basis for our understanding of the topic and informed our development of the interview guide for the next phase. Phase 2 consisted of semistructured interviews of CARL librarians responsible for communications about collections cancellations at their institutions. These interviews provided us with a rich source of qualitative data from which six substantive themes emerged.

These themes, along with the practical advice we heard from participants, will serve to assist academic libraries in developing strategies to communicate big deal journal cancellations so that the campus community supports the library.

The results from this study also led to larger questions. We, as a profession, need to reimagine the library's mission in academia. Several participants spoke passionately about our changing roles as librarians at our universities and our professional obligations to raise awareness about the dysfunction in the scholarly publishing system. Are we solely purchasers of books and journals? Or do we have more meaningful contributions to make to the academy? As Rogers noted, "I came to believe that part of the reason we struggled with making hard collections decisions is that we aren't mandated to do and be more than the tasks of our work."[47] Should we be advocates for a transition to a more equitable and sustainable journal publishing model? This is not just a "library problem," and finding more money to pay for subscriptions will not solve it. Cancellations are only a short-term solution to a longstanding problem; if we do not work together to push for more systemic change, then we will keep repeating this cycle. Librarians have valuable, in-depth knowledge of the scholarly publishing market that can prove to be of real relevance to our institutions. And academic libraries already possess considerable expertise in digital infrastructure services such as curation, discoverability, and preservation. We could be leaders for the academy in the transition to, and stewardship of, a more sustainable model of scholarly communication that is scholar-owned and mission-driven. Communicating and raising awareness across our campuses about these issues is the first step, and big deal cancellations may give us this opportunity.

Acknowledgments

APPENDIX. Semistructured Interview Guide

Preliminary:
- Thank you for agreeing to participate!
- Introductions
- Explanation and purpose/objectives of the study:
  - □ This research project is exploring the experiences of librarians (at CARL libraries) in communicating with their campus communities about collections cancellations. We have already completed phase 1 of this study, looking at publicly available communications posted on library websites. We hope these interviews in phase 2 of the study will provide deeper understanding of context as well as allowing participants to reflect on what worked well and what didn't in their communication strategies. We ultimately hope to determine some effective strategies for these kinds of communications.
- This was described in more detail in the Participant Consent Form. Any questions on this form? Sign/agree to Participant Consent Form.
- Regarding how this interview will work: I will ask questions and Charlene and Jaclyn will mainly be taking notes. We have several questions for you, but will take no more than one hour. If that all sounds good, we will start the recording now.

Warm-up:
To begin with, we have a short warm-up question…
1. Can you please talk broadly about how library communications to campus happens in your library? Who is responsible?
   (*Probes*: Is this part of a librarian's role? Is there a "Communications Officer"? Do you consider your library to be "strategic" in its communications?)

Main Questions:
Now thinking specifically about the topic of this study…
1. Please tell us about a time when your library had to communicate collections cancellations to campus.
   Probes:
   a. Did you have a communications plan (or similar strategy)? Did you feel like you were being strategic about it?
   b. Were there elements about the communications that you considered successful? Unsuccessful?
   c. What was the response from campus? (examples: faculty, admin, students)
2. What did you learn from that experience that you will (or will not!) repeat next time?
   (*Alternate wording:* Looking back, would you do anything differently?)
I'm going to change direction a bit now…[libraries in general: philosophy question]
3. In the first phase of this study (looking at communications posted on library websites), we noticed many libraries tried to educate/inform their campus on big deals, inflation, and currency exchange in their communications—but not on open access or issues related to the dysfunction/crisis of scholarly publishing as a whole.
   a. What do you think the library's role is in informing the campus community about

open access and the crisis in the scholarly publishing system?

b. Does your library do any outreach on these topics (scholcomm topics such as OA, dysfunctional scholarly publishing, and the like)?

(*Probe*: Is the schol comm person connected/coordinated with the cancellations communications person?)

Wrap-up:

1. Based on your experiences, what is your best advice for other libraries when communicating about cancellations?
2. Is there anything else you would like to tell us / think we should know? Anything you would like to expand on / clarify?

Closing:

- Thank you again!
- Next steps (that is, dissemination of results)
  - □ We're finishing the interviews by the end of August
  - □ We'll start analyzing the data in the fall, and aim to present at a conference and publish the results next year; will post all disseminations in our IR
  - □ Please follow up with any one of us for more info/details

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