Group Discussion & Activity Guide: Foundations

the ONEAL Project

https://oneal-project.org/

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Introduction

As part of the ONEAL Project curriculum, the project team, with the help of expert collaborators, desired to develop a set of synchronous teaching materials that could be used in concert with the lessons in the online learning modules. These materials, including in-class learning activities and group discussion guides, will enable groups such as consortia, professional organizations, and individual libraries to facilitate learning and practice within their organizations, as well as facilitate classroom discussion within MLS/MLIS courses discussing negotiation and collection management.

This guide supports the lessons introduced with the Foundations module and the accessibility lesson in the Issues module which were launched in Spring 2024. The project team (Katharine Macy, Scarlet Galvan, and Courtney Fuson) are grateful for the input of Hana Levay and Sidonie Devarenne for the creation of the Accessibility Discussion Guide.

Module: Foundations

Contracts and Licensing

Group Activity

Visit the SPARC Contracts Library and select **two** contracts from the same product. The contracts should come from different institutions. Review the contract terms using the techniques described in Chapter 4 of *Managing Licensed E-Resources: Techniques, Tips, and Practical Advice* and in the short lectures found in the ONEAL Curriculum.

Break into small groups and answer the following questions:

- What differences do you notice between the contracts?
- What would you update if this was your institution's contract for this product?
- What successes do you notice?

Small groups will share their observations.

Introduction to Negotiations

Group Activities

- **Word Cloud Activity** - Participants share words that describe their feelings about negotiation. Use this to level set and help everyone understand that many people are coming from a place of anxiety.

- **Think-Pair-Share** - Have your group partner up and discuss a recent negotiation. How did it go? What type of negotiator were you? Afterward, ask the group to share their experiences.

- **For library and consortia groups learning the curriculum:** Bring a copy of the work you completed in the exercise in Write Your Own Script *for your institution* (including any script language and drafts/updates for negotiation principles) to a meeting to discuss and build group consensus around values, goals, and limits. This document can work as the foundation for creating or updating principles for negotiation which your group can more broadly communicate to vendors, administrators, other library workers, faculty, and students.

- **MLS/MLIS Class Activity:** Review and evaluate the negotiation principles or values of your own institution's library. If they do not have negotiation principles, the library's values in general may also be used or you can refer to one of the following:
  - [CRKN Licensing Principles](#)
  - [Montana State University Negotiation Principles](#)
  - [Iowa State University: Principles for Advancing Openness through Journal Negotiations](#)
  - [Principles Guiding Negotiations with Journal Vendors at Oregon State University](#)

  What values do you see in the document and how does this impact how you approach negotiation?

Negotiation Planning Part 1 - Negotiation Strategy

Group Activity

- **Peer Feedback on the Framing Language Exercise** - (30 minutes) in groups of 2

  - Small Group instructions: (20 minutes)
    - Spend 10 minutes discussing both cases provided in the exercise.
    - During each case review, each person should share how they framed the offer or counteroffer as a win and as a loss - this can be done by swapping papers or reading aloud.
    - Each person will then provide constructive feedback on what was particularly strong in the framings as well as potential ways to improve.
    - As time allows, discuss how you would decide when to frame something as a win or a loss.

  - Larger group debrief:
    - Poll: Which framing did you find more difficult: As a win or as a loss? (10 minutes)
      - Ask why?
        - Guide the learners to reaffirm assertiveness, principled negotiation practices, and the fact that vendors are framing offers too!

Negotiation Planning Part 2 - Determining Library Interests (Internal Review)

Group Activities

- **Word Cloud Activity: Library Values** - Participants share words and phrases that reflect library values they are currently striving for when negotiating agreements with vendors.
  - Discussion: What values seem to jump out? How do considering these values impact how you evaluate licenses? What about pricing? What might you make concessions on to support your values?

- **Poll Question: When negotiating what are your top two priorities?**
  - Accessibility
  - Flexibility for future decisions
  - Keeping our patrons happy
  - Moving vendors to adopting our master agreement
  - Pricing
  - Privacy/Surveillance
  - Removing NDAs
  - TDM
  - Something else

    Use this poll to drive discussion by examining the results. Note what seems to be trending. Discuss how different priorities can impact your options. Two examples that you can point out are:
    - Flexibility means not signing longer contracts.
    - Keeping our patrons happy is often difficult when their values/priorities may not match the library's.

    Ask if anyone is willing to share their "something else."

Negotiation Planning Part 3 - Uncovering Vendor Interests (External Review)

Discussion Guide

- How did Covid-19 impact the scholarly and academic publishing industry? (This question was developed based on https://infrastructure.sparcopen.org/market-analysis)
  - Prior to the pandemic price increases averaged 5-6%, during the pandemic they slowed to 3-4% (Library Journal Periodical Price Surveys 2020, 2021, 2022).

- In 2023 & 2024 many publishers are pushing higher price increases and Library Journal (2023 Periodical Price Survey) expects that the average price in 2024 will return to pre-pandemic levels around 5.5%. Why is this a problem for academic libraries?
  - Budgets aren't increasing. By and large, budgets have not returned to pre-pandemic levels for libraries and likely won't.
  - Price increases before the pandemic were not sustainable in the long run.

- Considering that the market for academic libraries is saturated (basically their budgets aren't growing and often libraries are facing cuts), how are for-profit scholarly publishers pivoting to see growth? How might these different options affect libraries?

  - Potential ideas to discuss:
    - Acquisitions to control the entire research publishing pipeline (i.e. We are seeing mergers and acquisitions of companies used to manage information from the start of research (citation managers), data management of research, publishing and communicating scholarly research, collecting research metrics, and finally to producing analytics that institutions can use for grants and promotion & tenure decisions)
    - Selling to administrators not libraries
    - Research analytics and data (Privacy/Surveillance)
    - AI
    - Other markets?

Module: Issues

Accessibility

Discussion Guide

What are some accessibility deal-breakers?

In your group, spend a few minutes discussing the following ideas.

1. A resource, World of Bees, is up for renewal. While your institution has already renewed it for many years, this year you have been doing accessibility reviews of resources before they are automatically renewed. You ask the vendor for a VPAT, and you do keyboard navigation testing. Consider the following scenarios:
   a. World of Bees has excellent keyboard navigation testing results. You were able to browse around, do a search, and select a search result using the keyboard.
      i. The vendor has a recent VPAT that contains lots of comments about each element of the VPAT, and most of the criteria show that they satisfy the requirements. Do you consider canceling, or renewing?
      ii. The vendor has a VPAT that has no comments, and it just says "satisfies" for every criterion. Do you consider canceling, or renewing?
      iii. Consider: Is having a bad VPAT worse than having no VPAT?
   b. World of Bees has mediocre keyboard navigation testing results. You could eventually do everything you needed to do, but focus wasn't always visible, you got lost in menus, and you had to use tab an excessive number of times.
      i. The vendor has a recent VPAT that contains lots of comments about each element of the VPAT, and most of the criteria show that they satisfy the requirements. The line regarding keyboard testing acknowledges the issues you found. Do you consider canceling, or renewing?
      ii. The vendor has no VPAT and is not interested in supplying one. Do you consider canceling, or renewing?
   c. World of Bees has bad keyboard navigation testing results. Focus wasn't always visible, you got lost in menus, and you had to use tab an excessive number of times. The search bar could not be activated with a keyboard.
      i. The vendor has no VPAT and is not interested in supplying one. Do you consider canceling, or renewing?
      ii. The vendor has no VPAT and is not interested in supplying one. You find out that World of Bees is the only resource for the Bee Studies department, and they would be furious if the library did not have a subscription to it. Do you consider canceling, or renewing?

2. Let's assume that you are considering canceling World of Bees. You found a lot of issues during keyboard testing, and the vendor, Bees Inc., has no interest in providing a VPAT. The Bee Studies department would like to keep the resource but understands that it may need to be canceled if necessary. Consider the following scenarios:

   a. Bees, Inc. meets with you to discuss the issues.

      i. Shortly after, they announce they have made accessibility improvements, and now it passes the keyboard navigation test. Do you still cancel?

      ii. After the meeting they come back with a timeline of accessibility improvements. Do you still cancel?

   b. Bees, Inc. met with you last year and developed a timeline to make improvements, but they have not accomplished any and it's time for the next renewal. Do you cancel?

   c. Bees, Inc. is not interested in discussing the issues and claim they do not have the resources to work on improving accessibility, but they are willing to include some accessibility language in the license. Do you still cancel?

3. Let's assume you canceled World of Bees last year because of accessibility issues. The vendor has reached out to you and wants you to begin subscribing again. What would convince you to agree?

   a. They agree to adding strong accessibility language to the license.

   b. They develop a timeline for improvements.

   c. They provide a VPAT.

   d. They offer a large discount on the subscription.

   e. They demonstrate the accessibility improvements they have made.

Answers will vary for everyone. Each institution has its own comfort level with legal liability. Some institutions have more purchasing power than others and hold more sway over vendors. Someone's Bee Studies department could be inflexible and not acknowledge the importance of accessibility in purchasing decisions. The important thing is to decide where you stand as an institution and develop a policy or rubric that you would be able to weigh these situations before they occur.