“Independent Voices” from Reveal Digital

A New Model for Open Access

Presented to ASERL
April 9, 2013

Jeffrey Garrett, Associate University Librarian for Special Libraries, Northwestern University Library

Laura Micham, Merle Hoffman Director, Sallie Bingham Center for Women’s History and Culture, Rubenstein Library, Duke University
In this Webinar:

- Mission of Reveal Digital
- Business model
- Issues
- Benefits
- The first collection
- Open enrollment process
Reveal Digital “mission and goals”

• To make special collections material more meaningful and accessible to students, faculty and researchers through aggregation and digitization.

• Provide an enabling framework for libraries that produces digital collections within a unique cost-recovery model that fully supports open access.
The Framework

Prospectus Activities
- Scoping
- Sourcing
- Estimating costs
- Pricing

Open Enrollment
- Distribution of the prospectus
- Outreach
- Managing commitments

Decision Point
- Conversion
- Rights clearance
- Platform development
- Hosting
- Invoicing
The Business Model

Cost recovery=open access

All of the costs associated with producing a collection define its sales threshold. Once the sales threshold is reached and the collection has been completed, the collection moves to open access*.

*after a two-year embargo period
The Cost Model

Example of costs for the initial collection - Independent Voices *

Sourcing, Scanning and Conversion: $869,000
Royalties: $11,892
Editorial and Rights Clearance: $297,300
Systems and Hosting: $594,600
Sales and Marketing: $178,380
General Administrative: $59,460
Production and Project Management: $356,760
**TOTAL COSTS:** $2,367,392

* Costs and assumptions are detailed in the collection’s prospectus
The Pricing Model

Price = sales threshold / the estimated number of purchasing libraries.

Pricing is tiered into five categories:
1. 2-year colleges
2. colleges granting bachelor's degrees
3. Master’s degree granting institutions
4. Ph.D granting institutions
5. ARL institutions
## The Revenue Model

Example of pricing/revenue for Independent Voices

<table>
<thead>
<tr>
<th></th>
<th>Annual Contribution</th>
<th>4 Year Contribution</th>
<th>Target Libraries</th>
<th>Total Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 Year Colleges</td>
<td>$641</td>
<td>$2,565</td>
<td>-</td>
<td>$0</td>
</tr>
<tr>
<td>Bachelors</td>
<td>$1,283</td>
<td>$5,130</td>
<td>17</td>
<td>$87,210</td>
</tr>
<tr>
<td>Masters</td>
<td>$1,693</td>
<td>$6,770</td>
<td>22</td>
<td>$148,940</td>
</tr>
<tr>
<td>Other Doctorate</td>
<td>$2,563</td>
<td>$10,250</td>
<td>33</td>
<td>$338,250</td>
</tr>
<tr>
<td>ARL</td>
<td>$5,125</td>
<td>$20,500</td>
<td>88</td>
<td>$1,804,000</td>
</tr>
<tr>
<td><strong>TOTAL REVENUE</strong></td>
<td></td>
<td></td>
<td><strong>160</strong></td>
<td><strong>$2,378,400</strong></td>
</tr>
</tbody>
</table>
Cost-to-price ratio

- Costs are generally inline with traditionally published products, exceptions being sales, marketing and G&A overhead, which are significantly lower.
- Major difference is on the price side of the equation, where pricing is dramatically lower (33% of similar sized/type collections).
- What’s driving the lower price point is the elimination of ‘excess profits’.

Minimum Profit Target = 3-5 x costs (breakeven after first year)
Highly profitable products achieve 20-30 times costs
Issues: Sales Threshold

What happens if a collection doesn’t reach the sales threshold?

At the end of the enrollment period (or sooner) and before any invoices are sent, Reveal will evaluate the commitments from libraries relative to the defined sales threshold for a collection and make a decision to either:

1. proceed with the collection as defined in the prospectus
2. modify the scope/size of the collection, which would result in another open enrollment period based on a redefined prospectus
3. cancel the collection all together
Issues: Long-term access

• Reveal recognizes the need for a trusted third-party to provide long-term access and archiving. Discussions are ongoing with the Hathi Trust and the Internet Archive.

• Reveal is working with Indiana University as an independent party to evaluate content model and image quality for loading Independent Voices material into Hathi Trust.

• Reveal will be archiving our collections with CLOCKSS.
Issues: Sustainability

How sustainable is this model and could it work without Reveal’s involvement?

• The model makes use of established acquisition budgets to fund the collections. Libraries control how and where they want to invest in future collections.

• Over time Reveal’s role may evolve into more of a service model, where libraries take more of a lead role in defining future collections.
Checks and Balances: Advisory Groups

Editorial

Group of scholars and librarians who will assist in defining the scope and coverage for each collection.

Steering

Participating librarians and consortia staff will provide direction for the evolution of the Reveal model and service offering, long-term archiving solutions, license agreements and pricing strategies.
The Benefits of purchasing

Benefits for libraries that purchase the collection:

• immediate access (minimum of two years)

• option to locally load the collection

• title level MARC records and COUNTER compliant usage reports

• priority as a source for new material

• voice in future collection development areas
The Benefits of providing material

Benefits for libraries that provide material to the collection:

• free copies of digital files (images and metadata) for all material sourced from the library with no restrictions on use

• permission from the rights holders to display their material through the library’s website for in copyright material

• compensation for all sourcing related costs

• discounted price for the collection if a major contributor (more than 20%)
Benefits to the library community

Overall benefits:

• a cost effective alternative to grant funding for digitization
• through aggregation Reveal is creating new digital collections that exceed the sum of their parts
• the Reveal model provides a framework (cost and price models, open enrollment acquisition model, hosting option, etc.) for libraries to use to bring their own collections to open access
• makes use of existing acquisition budgets to fund both digitization and access
• establishes new price points for acquiring digital collections
The First Collection

Independent Voices - an alternative press collection

Over the next four years, Reveal will release a series of digital alternative press collections that are complete runs of newspapers, magazines and journals drawn from the special collections of participating libraries. When completed, Reveal and its partners will have built the largest digital collection of alternative press periodicals, with over 1,000 titles and 1,000,000 pages.
Future Series

8 series:

- Women’s Alternative Press
- GI Underground Press
- Campus Underground Newspapers
- Minority Press (Black, Hispanic, Native American, Asian American)
- Extreme Right Wing Press
- Anarchist Periodicals
- GLBT Press
- Literary (Little) Magazines
In the first collection

Targeted titles

**The goal:** to have complete runs of 1,000 titles across all eight series (avoiding duplication of titles readily available through other sources).

**The method:** use existing bibliographies, reference books and subject experts to identify target list of titles.

**Source library input:** In order to incorporate interests of participating libraries, 10-15 percent of the titles held open for selection by these libraries.
Copyright

For copyrighted material Reveal is obtaining permission from the rights holders to display their publications in its platform, including eventual open access through third-parties. Permission is also extended to the source institutions to make the material scanned from their holdings available through their websites.
Specifications

- Page image-based delivery with searchable text/metadata and hit term highlighting.
- Browse by series and title; basic and advanced search.
- Beta release in January with full release planned for Summer.
- Scanning each page at 300dpi, 24 bit color (uncompressed TIFF and compressed JPEG and 72dpi thumbnails for web access).
- Title/Issue/Page level metadata created in a METS/ALTO format.
Curricular relevancy

American Culture (208) - Post World War II American Sub-Cultural Movements: Beatniks, Hippies, and Punks

Cultural Anthropology (370) - Language and Discrimination: Language as Social Statement

Black Studies (337) - Black Women in the U.S., Part II: Contemporary Perspective in the 20th and 21st Centuries

English (303) - Rhetorical Activism and U.S. Civil Rights Movement

History (328) - American Thought and Culture Since 1945

Political Science (307) - American Political Thought Post WWII: The context of "Mad Men"

Women Studies (313) - Special Topics in Gender and the Humanities - Bad Homosexuals
Local and regional history in the Southeast

Feminist literature:
- Distaff (New Orleans, LA)
- Feminary (Chapel Hill and Durham, NC)
- Quest: A Feminist Quarterly (Washington DC)
- US (Tampa, FL)
- Women: A Journal of Liberation, Inc. (Baltimore, MD)

GI literature:
- Bragg Briefs (Fort Bragg, Spring Lake, NC)
- Death Ship Times (Fat Albert's) (North Charleston, SC)
- Fun Travel Adventure (Fort Knox, KY)
- Grapes of Wrath (Norfolk, VA)
- Rap! (Fort Benning, Columbus, GA)
Open Enrollment Process

During the six-month open enrollment period, starting January 1, 2013 and running through June 30, 2013, libraries will be able to make their non-binding commitments to purchase the collection. If more than the target number of libraries commit during this period, the price will be reduced proportionately.

Reveal will provide open access to 75,000 pages of Women’s Press and GI Press material sourced from Duke, Northwestern and the GI Press Project.

www.revealdigital.com/voices
Open Enrollment Process

Reveal is asking libraries to fill-out a non-binding (but good faith) indication of intent to purchase; http://www.formstack.com/forms/?1378853-6DxS0zIRNa or click “ENROLL” button on the Independent Voices site.

Enrolling libraries will receive a confirmation email.

Reveal has recently made its decision to go forward with the Voices project so LYRASIS will send out a notification of intent to invoice followed by an invoice. Libraries can opt-out of their commitment at this time.

LYRASIS is the sales administrative partner for Reveal with direct outreach to its members and key consortia. No LYRASIS membership is required for a library to participate in this offering.
An appealing way to spend end of year funds

• Reveal has committed to completing the collection as defined in the prospectus. The beta site, www.revealdigital.com, has nearly 75,000 pages of alternative press periodicals.

• Later this summer Reveal will be update the beta site to a full release, which will include more functionality and nearly 150,000 pages of material.

• They will load 275,000 pages of new content over the next three years to complete the collection.
Questions?

Webinar presenters
Jeffrey Garrett: jgarrett@northwestern.edu
Laura Micham: laura.m@duke.edu

Reveal Digital
Jeff Moyer - jmoyer@revealdigital.com / 734-821-3880

Independent Voices site: www.revealdigital.com/voices