

RE: IUPUI University Library

Open Negotiation Education for Academic Libraries

Project Type: Implementation **Laura Bush 21st Century Program Grant Goal: 3 Objectives:** 3.2, 3.5

Indiana University Purdue University - Indianapolis in collaboration with Grand Valley State University and Belmont University seek \$249,108 in funding from the Institute of Museum and Library Services through a two-year Laura Bush 21st Century Librarian Program grant. Funding will be used to develop and implement curricula and open educational resources to support teaching negotiation education within academic libraries and in Master of Library Science (MLS/MLIS) programs. These educational resources will teach negotiation theory and strategy using the academic library context of negotiating third-party content provider agreements. Academic librarians and staff who engage with collections work to support institutional research, teaching, and learning goals will benefit through access to a freely available professional development resource that builds a strategic skillset.

Project Justification: Before Covid-19, the 5-year compound annual growth rate of collections budgets of doctoral and masters granting institutions was 2% (IPEDS FY2019 vs FY2014), while facing on average 5% to 6% annual increases in e-resource prices (Library Journal Periodical Price Survey). This difference combined with increased complexity in licensing agreements means that libraries need to develop their negotiation skills as a strategic priority. Often academic librarians lack formalized training in negotiation skills. Many library professionals learn to negotiate with third party vendors while on the job from colleagues when facing budget cuts. However, negotiation and strategic collection development must be forward-looking, so every academic library needs this skillset, and the infrastructure needs to be built to support the development of these skills so that we may operate libraries sustainably while improving access and protecting library and stakeholder interests. Professional development is available, but programs are not equitably priced and lack necessary context around library and third-party vendor relationships. For instance, the continuing education program offered by Kellogg School of Business costs \$5,500 and Harvard's Program of Negotiation workshop is \$3,497. There are MOOC (Massive Open Online Course) options through various universities and Coursera, but again these lack academic library context and opportunities for peer engagement, mentorship, and clear pathways for development. This project will create open curricula and educational resources focused on teaching negotiation theory, strategy, and techniques from the context of issues facing academic libraries, when they are negotiating price and licensing terms.

This project supports grant program objective 3.2 because broader reach of negotiation education will enable academic librarians and future librarians who will work in negotiating for electronic resources to develop the skills to negotiate agreements with content providers that serve their library's and their stakeholders' interests, facilitating budget management while increasing improved access to resources over time. It will empower librarians regardless of their institutional funding to negotiate better deals with vendors, which will increase access to their communities. This project supports objective 3.5 by developing online training, asynchronous and synchronous curricula that may be used in concert, and case studies to enable the development of negotiation skills that will be used to improve access to collections and digital collection management.

Project Work Plan: This project grant will support three phases.

Phase 1: Curriculum Planning [August 2022 - April 2023] We will host online forums via Zoom with advisory board members, topic experts, and representative users to dive deeply into academic library negotiation topics such as negotiation licensing terms, privacy and e-resource agreements, and library negotiation planning and preparation. Following the specialized topic discussions, we will host a day-long curriculum planning workshop with project staff, advisory board members, and representative users. The goal of the workshop is to clarify needs by defining curriculum learning objectives, brainstorming avenues for online content delivery (e.g., video, readings), and identifying expert partners that may assist in co-creating online content which will be published as a MOOC (Massive Open Online Course). During the planning phase the MOOC platform will be selected based on curriculum design needs. In addition, during this period, the project staff will draft an interview protocol that will seek librarians willing to discuss their experiences with negotiation. These collected stories will be used to draft fictionalized instructional case study materials on real-

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world issues faced when working with e-resource vendors. Interviews will begin in January 2023 and conclude by May 2023 during Phase 2.

Phase 2: Curriculum Creation [April 2023 – February 2024] Project staff will collaborate with expert partners to assist in content co-creation to develop asynchronous learning content, synchronous teaching support (discussion guides), and case study creation through August. Case studies will be written to support practicing negotiation skills providing librarian perspective, vendor perspective, and a teaching note. In Fall 2023, a representative cohort will pilot the asynchronous curriculum to gather insights and feedback that will be used to improve and clarify the curriculum before launch. Curriculum and resources will be revised in January – February of 2024.

Phase 3: Outreach [March 2024-July 2024] The curriculum will be published and promoted, putting particular emphasis on communicating the resources to underrepresented groups. Project staff will travel to or attend conferences virtually to promote the project. Focused electronic communications will be distributed via list-servs and social media, including those that serve smaller under-resourced institutions and librarians of color.

Diversity Plan: One of the goals of this project is to increase access to library professionals a strategically important skillset for managing collections and leading libraries. In each phase of the project, we will consciously invite and include librarians from underrepresented groups, particularly librarians of color, and those who work with under-resourced institutions. This is particularly important in the planning and piloting stages of the project. In addition, we will prioritize conferences and communication platforms for marginalized communities during our outreach. Planned conference in-person attendance: ACRL 2023 (promote the project, solicit feedback, call for pilot-testers), ER&L 2024 (promotion), ALA Annual Conference 2024 (promotion). Communications and outreach opportunities (e.g., conference, e-conference, virtual meetings, list-serv communications) will be sought to gain feedback and promote this professional development open educational resource to groups such as the Black Caucus of the American Library Association, the Asian/Pacific American Library Association, and the ACRL Discussion Group: Librarians from Very Small Academic Institutions.

Project Results: Upon completion of the grant there will be multiple deliverables which will be published with an open license. 1) Asynchronous learning modules that will be hosted for a minimum of 5 years on a MOOC platform. 2) Discussion guides that can be used to support synchronous learning that can be used by individual libraries or academic library consortia if desired to facilitate group learning. 3) A set of academic library-based case studies that enable practicing negotiation skills. The curriculum developed will raise the capacity and skill of academic librarians to plan and execute negotiations for electronic resources with third party vendors moving libraries toward sustainability as well as improving access to resources for patrons. While targeted toward academic libraries licensing resources for research, teaching, and learning, the materials created also have the potential to benefit all sectors (academic, public, school, and special) at the national and potentially global levels. Library science programs will have access to open educational resources addressing an issue of strategic importance around maintaining collections.

Project Staff: Project lead and principal Investigator: *Katharine Macy*, Collection Assessment Librarian, Indiana University Purdue University - Indianapolis. Negotiation in libraries is one of her research interests. She co-led the ACRL/SPARC Negotiation 101 workshops in 2021 and led the ACRL/SPARC Summer Negotiation 201 Webinar Series. Co-Principal Investigator: *Scarlet Galvan*, Collection Strategist Librarian, Grand Valley State University. She is an active member of the journal negotiation community who frequently discusses negotiations and licensing agreements. Co-Principle Investigator: *Courtney Fuson*, Asset Management Librarian, Belmont University. She brings experience in collection development and management as well as the perspective of smaller academic libraries to the project.

Budget Summary: Our request is for \$249,108 for this 2-year project. Project costs include Personnel Effort (\$73,150), Fringe (\$25,627), Student Support (\$36,000), Travel (\$14,304), Pilot Participant Stipends (\$10,000), Honoraria/Consultants (\$25,000), Project Supplies/Software (\$2,000) and Indirect Costs (\$63,026).