\*\*\*\*PLEASE DO NOT SHARE Beyond the ARL Library Community\*\*\*\*

November 12, 2014

To: ARL Collection Development Contacts

From: Celeste Feather, ARL Licensing Initiative Program Manager, LYRASIS

Re: University Press Scholarship Online Offer from Oxford University Press, Winter 2014-2015

**Offer Background and Summary**

Our third offer from Oxford University Press for the ebook content at their [University Press Scholarship Online (UPSO)](http://www.universitypressscholarship.com/) site includes content they have loaded at the site from 2013-2014 and the forthcoming content that will be loaded in 2015. I am pleased to report that negotiations to improve the UPSO offer were successful as this year the participation thresholds to achieve more favorable discounts are lower. All participants will get at least 25% off the list price, and if we gather more than 15 participants, the discounts increase. As more libraries participate, the better the prices become. **The offer deadline by which libraries need to express their intentions to order at specific discount levels is** **February 27, 2015. Final orders will be confirmed and invoiced by March 15, 2014.**

The UPSO offer provides many flexible opportunities for purchasing content with perpetual access by year, subject, and publisher. One key point of which everyone should be aware is that the years of content at UPSO (i.e. 2013-2015) are not an exact match to the publication years of the titles. Oxford uploads new content to UPSO on a monthly basis. The uploads generally contain content published in that same year, but a small amount of the content will be older. OUP reports that they add this older content in answer to requests by libraries for specific titles. Also, when a new partner press joins UPSO, the first upload of content from that press will contain all of the backlist volumes that the press wants to host at UPSO regardless of the year of publication. The subsequent uploads from that press will contain mostly content that is published in the current year. In recognition that the older titles are not as appealing as new ones, OUP reduces the cost for the older titles by 20% when they set the list price for each collection. All of our group discounts will be off that already reduced cost for the older titles in the 2013-2015 uploads.

UPSO offers 28 subject collections:

|  |  |  |
| --- | --- | --- |
| Anthropology | History | Philosophy |
| Archaeology | Information Science | Physics |
| Biology | Law | Political Science |
| Business/Management | Linguistics | Psychology |
| Classical Studies | Literature | Public Health/Epidemiology |
| Computer Science | Mathematics | Religion |
| Economics and Finance | Music | Social Work |
| Education | Neuroscience | Society/Culture |
| Environmental Science | Palliative Care | Sociology |
| Film, Television/Radio |  |  |

University presses that now participate in UPSO are:

American University in Cairo Press

British Academy **(NEW)**

University of California Press

University of Chicago Press

Edinburgh University Press (UK)

University Press of Florida

Fordham University Press

Hong Kong University Press

University Press of Kentucky

Liverpool University Press (UK)

University of Manchester (UK)

University of Mississippi Press

MIT University Press

University of North Carolina Press **(NEW)**

Oxford University Press

Policy Press (from the University of Bristol in the UK)

Stanford University Press

Yale University Press

The participation thresholds and discounts for the 2015 offer are as follows.

Up to 15 libraries – 25% off

16-30 libraries – 35% off

31-45 libraries – 40% off

46+ libraries – 45% off

An additional 5% discount will apply if an entire annual collection is purchased.

All of the pricing details are set forth in the spreadsheet located at <http://bit.ly/2015UPSOPricing>.

There are 5 pricing tiers in this UPSO offer, based on library type and FTE counts. There are ARL libraries in each tier.

Part of the work of the ARL Licensing Initiative is to address concerns about collection overlap. In 2015 there is likely to be more overlap of content between Project MUSE ebooks and UPSO ebooks due to the growing number of presses with substantial content at both sites. The presses at both MUSE and UPSO to be carefully considered regarding overlap are:

* University of California Press
* University Press of Florida
* Fordham University Press
* Hong Kong University Press
* University Press of Kentucky
* University Press of Mississippi
* MIT Press
* University of North Carolina Press

In 2014, for example a title list comparison between UPSO and MUSE for these publishers shows 128 titles at UPSO and 385 titles at MUSE. UPSO and MUSE have different criteria for inclusion, so this fact accounts for some of the difference. MUSE collections contain some edited compilations, small reference works, poetry, and a few other types of content that are not, strictly speaking, scholarly monographs. Oxford takes a slightly more narrow approach for UPSO content and focuses primarily on scholarly monographs. Of the 128 titles at UPSO from these publishers in 2014, 83 of them are also in the MUSE 2014 collection.

**Action Items**

1. Review the pricing spreadsheet at <http://bit.ly/2015UPSOPricing>.

2. Review the ARL/LYRASIS central license for UPSO at <http://bit.ly/Tt0RHt> and be prepared to agree to abide by the terms of this license at the point of an actual order. If you already agreed to this license last year, nothing further is needed. If amendments are needed to specify state law in the case of public institutions, contact me ([celeste.feather@lyrasis.org](mailto:celeste.feather@lyrasis.org)) so that we have time to facilitate those amendments.

3. Determine collections of interest and the price point (% discount off list) that would enable you to make a purchase.

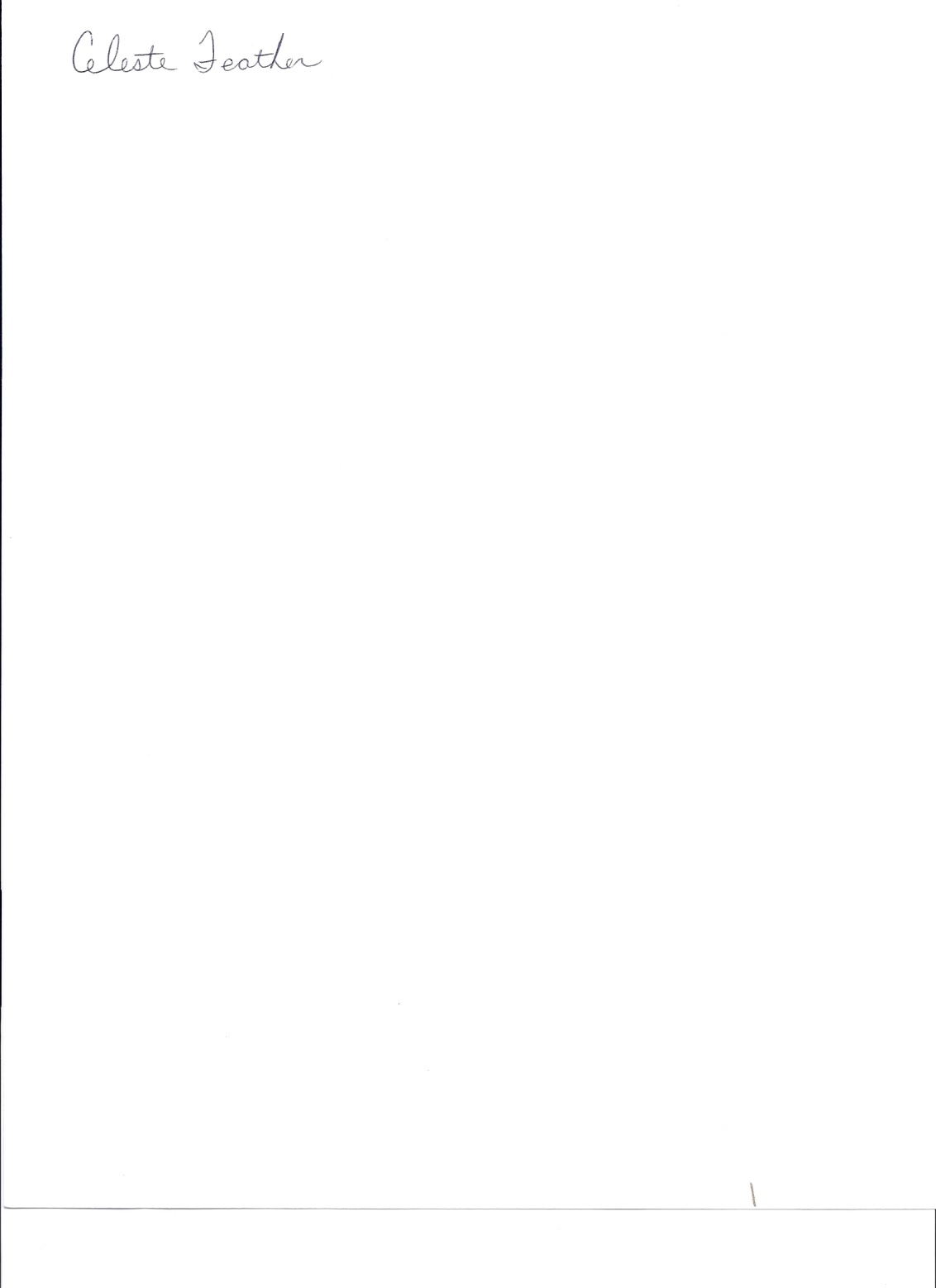
4. Complete the Expression of Interest Form at <https://www.surveymonkey.com/s/UPSO2015> by **February 27, 2015, indicating the % discounts needed for each collection of interest that would enable your library to place an order**.

5. Be prepared to confirm a final order by **March 15, 2015**. As a reminder so no one is caught by surprise, a 5% administrative fee as negotiated between ARL and LYRASIS will apply to all orders from libraries that are new participants in the UPSO license. For returning libraries, the administrative fee will be 4%. If we reach a total order amount of $2 million, then the % fee will start to decline.

**License Negotiation**

LYRASIS has signed a [central license](http://bit.ly/Tt0RHt) with Oxford University Press. All libraries purchasing UPSO content through LYRASIS will be covered by the terms of this agreement. LYRASIS will be responsible for obtaining each institution’s agreement to abide by the terms of this central license, which we will do as part of the routine ordering process. We recognize that legal offices at some institutions will require state-specific language, and we can facilitate amendments of this type to the central license when absolutely necessary. **If you have local requirements that necessitate a special amendment to the central license and believe that you will be making a purchase, please let me know as soon as possible so that we can reach resolution for each special circumstance.**

I will be glad to address any questions ([celeste.feather@lyrasis.org](mailto:celeste.feather@lyrasis.org), 800-999-8558, ext. 2954), and I look forward to working with you again this year.



Useful links:

[UPSO 2013-2015 ebook collection pricing](http://bit.ly/2015UPSOPricing)

[UPSO 2013-2014 title list](http://bit.ly/UPSOTitles2013_14) (2015 is forthcoming)

[LYRASIS ARL central license with Oxford for UPSO](http://bit.ly/Tt0RHt)

[Expression of Interest Form](https://www.surveymonkey.com/s/UPSO2015)

[University Press Scholarship Online](http://www.universitypressscholarship.com/)