**TO:** Mark Stover, Electronic Access to Information Resources (EAR) Committee

**FROM:** EAR Ebook Subcommittee

**RE:** Final Recommendation – EBA/DDA Proposals

**DATE:** March 16, 2018

**Introduction:**

In September of 2017 EAR met for the first time during the current academic year. At that meeting the EAR Ebook Subcommittee was formed and consists of the following members; Carole Correa-Morris (SJSU), David Hellman (SFSU, co-chair), George Wrenn (CSU Humboldt, co-chair) and Holly Yu (CSU Los Angeles).

The Subcommittee met and reviewed data gathered from an ebook poll conducted by the previous Ebook Subcommittee. Based on that information the Subcommittee determined there was a system-wide interest in conducting either an evidence based acquisitions (EBA) or demand-driven acquisitions (DDA) ebook pilot. Several years ago a DDA pilot had been conducted in the CSU with nominal success, but in the time since DDA has developed significantly and EBA has emerged as a new model. The Subcommittee felt it was a good time to explore these models as a method of providing content across the CSU, especially after the implementation of the Unified Library Management System.

**Summary:**

Based on the ebook poll information the Subcommittee selected six vendor/publishers to contact (EBSCO, Gale, JSTOR, Oxford, ProQuest and Springer). Preliminary discussions were held via teleconference in the middle of December 2017 and the vendors were asked to submit a proposal by the middle of January 2018 with the Subcommittee indicating a preference for an EBA model. All of the vendors complied and submitted EBA proposals with the exception of Oxford, who declined to submit. The details of those proposals were elaborated upon in the Subcommittee’s preliminary report.

After the review of the proposals the Subcommittee narrowed down consideration to just two vendors, ProQuest and JSTOR. The Subcommittee felt these two vendors offered practical proposals, which included the most content at the best value. Both proposals offered DRM-free access to thousands of university press titles (ProQuest 24,000; JSTOR 55,000) over the course of a one-year license. Both also asked for a significant investment of funds (ProQuest $250,000; JSTOR $321,154) a portion of which would be assessed as an access fee and the rest would be used to permanently purchase books based on usage data provided by the vendors. Both proposals would require individual CSU libraries to opt-in and contribute funds. As far as access was concerned ProQuest had a 3X3 simultaneous user model for CSU access (9 simultaneous copies for the entire CSU) and JSTOR offered 24 copies with unlimited simultaneous users. In terms of the cost of copies purchased at the end of the pilot ProQuest proposed a 3X3 simultaneous user multiplier and JSTOR proposed a 65% discount on title price multiplied against 22 (negotiated down from 24).

In the meantime the Council of Library Directors received $91,000 in funds from the Chancellor’s Office to use at their own discretion, which they offered to EAR. With that in mind the Subcommittee went back to the two vendors and asked them what could be done exclusively with that amount so campus opt-in costs would not be a factor. Both vendors came back with DDA proposals. ProQuest offered a nine-month deal (to be concluded by the end of 2018), with a $30,000 access fee and the same per title multiplier of 3X3. JSTOR offered essentially the same deal as their EBA proposal, with the same multiplier but no access fee. JSTOR also offered fairly generous DDA triggers of 144 chapter views or 96 chapter downloads. After reviewing the four proposals from ProQuest and JSTOR it was determined the best choice was either the ProQuest EBA offer or the JSTOR DDA offer. At the annual EAR “in-person” meeting both vendors presented their proposals and answered questions from EAR members.

**Recommendation:**

All of the proposals have strengths and weaknesses to consider. Taking everything into account the Subcommittee recommends EAR approve and initiate the JSTOR DDA proposal. The Subcommittee feels this is the best way for CSU libraries to once again explore system wide acquisition and ownership of ebook content. With the JSTOR proposal library users will have unlimited access to tens of thousands of quality university press titles in a DRM-free environment. Admittedly given the multiplier per title costs will be high but on a per campus basis it will actually be fairly moderate. Also, the CSU may not end up owning many titles at the end of the pilot, but the Subcommittee feels the overall access to content allowed, plus the owned content and the usage data will make the investment worth it. There is a great deal that can be learned from this pilot that can potentially move the CSU forward in regards to shared resources and collaborative collection development.

The Subcommittee recommends the pilot be implemented as soon as possible so we can take advantage of $91,000 offered by COLD. Licensing and financing should be handled through SDLC and the Subcommittee suggests a start date of no later than July 1, 2018, running through June 30, 2019 or until funds are fully expended if that happens sooner.

The Subcommittee also wants to be realistic about some concerns around this pilot. First of all overlap analysis has been difficult to do, but serious overlap has been identified between JSTOR and ProQuest’s Academic Complete ebook collection. The Subcommittee recommends that these titles be excluded from the pilot, which JSTOR indicates can be easily done. In addition either the CSU centrally through ALMA or individual campuses will need to suppress or remove DDA content overlap with ProQuest and potentially other vendors. The good news is JSTOR can manage overlap for current DDA users on the JSTOR platform and more importantly will not count JSTOR content currently owned by CSU campuses in their multiplier equation (in other words if campus X already owns a title via JSTOR the multiplier goes down by one). Finally, the Subcommittee acknowledges the potential that funding may run out before the end of the pilot and contingency plans will need be made to lessen the impact on CSU libraries and their users.

Submitted by

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