Report of the EAR ebook Work Group

May 8, 2017 Revision

**Charge:** Provide COLD with a proposal for moving electronic book acquisition from local to central post ULMS Implementation.

Premise: The CSU Libraries will implement a ULMS in summer 2017, which will provide a suite of central capabilities that could create collective opportunities and efficiencies.   Available funding in the CSU continues to move from central to local allocation, and the allocation of local funding will most likely be driven by the Graduation Initiative.  The funding allocated via COLD is not expected to increase in the near future.

* How could this be handled centrally?
* Vendors
* PDA or Non-PDA
* Perpetuity only/Blend/Licensed Only
* How might we fund with no new monies (request annual $ from CO, everyone kicks in X amount like journals or ULMS).
* Conversion of high use electronic book to 23
* Phase out local acquisition?

The EAR ebook Work Group sent out a survey on March 7, 2017 with a due date of March 20 to the collection development list (csucd@lists.calstate.edu) to learn about their ebook collections and get a feel for the thoughts concerning possible collaborations across CSU libraries. Fourteen librarians responded for their libraries, and the survey results are attached. The Survey Monkey instrument is located here: <https://www.surveymonkey.com/r/LRJW8ZJ> .

Not surprisingly, respondents use many different vendors to supply ebooks to their campus. The vendors for consideration in a CSU project could be wide-ranging. Because we are so diverse in our needs, numerous vendors were mentioned by the libraries for consideration for centralized ebook acquisitions. The top ones were ebrary (moving to the Ebook Central platform in Summer 2017), Gale GVRL, JSTOR and Springer, with Credo, EBSCO, Project Muse, and Safari just behind. When considering a vendor for centralized ebook acquisitions, several respondents mentioned favoring those who do not use DRM, such as JSTOR or Project Muse. In terms of licensing and access, most preferred a blend of subscription-based and licensed in perpetuity.

The question of contributing a set amount for a joint account across all campuses generated concerns over what the amount might be and how to determine cost distribution in an equitable manner. One suggestion was to continue the cost distribution model EAR developed for e-journal packages: 20% Base, 50% FTE, 30% Usage. At the very least, FTE alone would not be a suitable model, and further discussion would be needed. Another suggestion was to examine the overlap of ebook purchases from campus to campus for potential cost-savings. Since campus budgets are already strained and a number of campuses have had to absorb much higher costs with SDLC journal packages, there are concerns about the amount needed to implement centralized acquisitions. About 47% of campuses felt this should be an opt-in; only 10 of the campuses responded in the affirmative that they would be willing to contribute to a joint account.

Determining the content of a shared ebook collection could be through PDA from the entire vendor list, PDA from a pre-selected list, a core collection, a collection based on high-use titles, a mix, or other options. A variant on PDA could be an evidence-based model, taking into account actual usage during a period of time that we could set with an agreed upon total purchase price on deposit. Respondents were most interested in a mix, reflecting the complexity of trying to purchase materials to suit a variety of needs. A core ebook collection could be very useful.

A concern would be the campuses that have already individually purchased a title -- would they be double paying. Could they receive a partial reimbursement from the vendor, or could the CSU receive credit considerations in determining the system-wide cost? Figuring this out will be complex. Even the idea of high use and a campus’ contribution might need to be taken into consideration at the CSU level. Campuses have already purchased titles and have usage. One way is going back and seeing where the high use is in those titles, but the question might become what does that mean for purchase, only the other campuses contribute for that particular title or this is a purchase with CO funds, not our contributed funds? Running a PDA might be easier when no campus has the title. Some campuses have single access on their purchased titles; others might have unlimited. Every campus has a different approach that might have to be taken into consideration when determining contributions for acquisitions.

Perhaps the most difficult question was the issue of how to manage centralized acquisitions. Respondents drew comparisons to how other e-resources are handled, such as the ECC ebrary package, and pointed to the SDLC’s management of billing. A few respondents were receptive to core resources being handled centrally so that individual campuses could focus collection development efforts on their unique programs. Records could be centrally activated in Alma, possibly with the assistance of a staff member working at one of our libraries and a collection development librarian in close consultation with Eddie Choy.

Campuses will most likely continue to purchase titles that represent their immediate unique needs outside this project. In addition to the current Academic Complete from ebrary, the CSU might begin with a core collection of high use titles. A definition of a core collection and high use will need to be developed. If the current high usage is in ebrary, do we permanently secure those titles with a back-up purchase or trust that we know in advance the titles to withdrawn? To move us forward beyond that time, a common PDA system could be implemented across the participating libraries. At this point in time, it seems clear that the SDLC cannot pay for this project and so the individual CSUs will have to contribute if it is determined that we indeed want to move to centralized acquisitions. As a result of SDLC negotiations, it should become clearer as to the funds required and the vendors with the most optimal models for our needs.

Jodi Shepard who headed the CSU PDA project several years ago was contacted for her input. Three vendors were used: ebrary, EBL and Coutts. Even though all campuses did not participate, the project required a tremendous amount of management to plan, work with vendors, coordinate, and complete the tasks involved. The amount of work was perhaps more than the value of the project, e.g., whether the books selected are in use today. With a PDA project, spending the available money fast is a major concern. Three uses of 10% of a book triggered a purchase for the CSU. An evidence-based plan with an evaluation and comparison of the usage of a longer time period would potentially work better for a long-term project. Funding was an issue. In a PDA program, a lot of money can be spent in an extremely short amount of time. Since we do have ebrary (Ebook Central in the future) and since there is a great concern regarding books that drop out, Jodi suggested that we use our funds to secure needed books based on usage of those books designated for elimination.

Next steps

The question of ebooks and the move to centralization is a complex one. Campuses are at a different stage of development regarding their e-book collections, some having added many single titles with perpetual access. How we move to more centralized acquisitions is going to take further in-depth study of the collections and collection development practices of individual campuses. Some next steps include:

* Have conversations with ebook vendors to find out what might be possible. Perhaps target ones that were suggested in the survey results, such as JSTOR, to see what they have to offer. Consider interoperability with Primo. We could then share that information with all interested parties, and continue the discussion.
* Figure out the best acquisitions model, one that ideally will work for everyone.
* Determine what a core collection, such as Academic Complete, means for all of us.
* Involve long-term collection folks in this process.
* Examine overlap of current titles across campuses.
* Address potential costs, given budget cuts. How much can a campus reasonably chip in?
* Evaluate access options. Can we afford truly unlimited access to titles for everyone? Should we negotiate for 50 simultaneous users across the system as an example?

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