Introduction to Electronic Resource Acquisition

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Linda Creibaum and Star Holloway, "Introduction to Electronic Resource Acquisition" (2017). *Proceedings of the Charleston Library Conference*.
<http://dx.doi.org/10.5703/1288284316672>

Introduction to Electronic Resource Acquisition

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Abstract

Two acquisitions librarians led an informal introduction to the basics of electronic resource acquisition in this session intended for those new to this unique and intricate field. The session explored acquiring e-books, journals, journal backfiles, primary source collections, and databases. Topics of discussion included vendor selection and services, timing for trials and purchases, access options, price negotiation, and licensing concerns. This session also reviewed communications with campus constituents concerning resource changes.

Participants left the session with a better understanding of possible options, considerations, resources, and support structures available to them as acquisition specialists.

Introduction

This session opened with presenters Linda Creibaum and Star Holloway pointing out that not every topic discussed would be applicable to all acquisitions departments or academic libraries. Holloway began with a brief review of basic electronic resource types such as backfiles, databases, and e-book and e-journal packages. This led into an explanation of common terminology used within acquisitions including embargoes, license agreements, and moving walls for online content. The difference between access to and ownership of electronic resources was examined.

Some factors for consideration concerning potential library resources were discussed next. General considerations like ease of use, vendor online support, availability of usage statistics, any comparable products, and different vendors that may offer the resource are all important elements to keep in mind. The product's user model may also need to be considered. Products that offer an unlimited number of concurrent users may be more desirable than those that have a set number of concurrent users or seats, even though access for more users typically comes at a higher price. Authentication methods for resources was also covered. IP authentication with the use of a proxy server is the most common authentication method for electronic library resources, but not all products offer this feature and thus may be less advantageous. Some alternative authentication methods include individual user log-ins and installation on individual workstations. Trials are often beneficial when considering a potential resource.

Trials assist with gaining feedback on the product and provide additional use for free with a purchase or subscription. The presenters suggested it may be beneficial to take a trial only if there is serious interest in the product. Consider listing new resources as a one-year trial during the first year of a subscription in case usage does not justify continuing the product.

The presenters suggested that when considering obtaining a larger resource, some of the initial decisions may be based on factors such as the likelihood of getting sufficient use of the proposed resource and whether or not there is enough difference from the library's current resources to warrant the expense. It might also be appropriate to investigate if this is part of a package or another resource, either one your library already has or one that would be a better fit.

After determining that this resource appears to be a good resource for your library, explore the payment model. This is usually determined by the nature of the product, with the vendor making it available only by purchase or subscription, but occasionally the library can choose. An outright purchase, which is most often for a backfile, collection, or package, provides perpetual access to the information without further purchase payments. However, many vendors do charge an annual hosting or access fee for these purchased resources.

Typically a subscription to a resource provides access for the duration of the subscription period, and often will provide access to the subscription years (but only those years) after a subscription has ceased.

Database aggregators provide access only through the subscription period and may change the content provided between renewals.

Other pricing models are pay per view or the use of tokens. Tokens are a system wherein an institution or library purchases a number of tokens and every time a user accesses an article, the publisher essentially takes a virtual token. This is a very flexible plan; the supply of tokens may be exhausted rapidly or may last longer, depending on how the system is set up.

Give thought to whether or not this is the best time to buy. Sometimes vendors will offer special pricing on products near the end of their fiscal year. Other factors might include budgetary concerns in your library or institution, or the availability of funds that should be spent before the end of the fiscal year. For academic libraries the academic calendar will need to be considered; it is unlikely to be the best use of funds to start an expensive subscription December 1, right before final exams and a long holiday shutdown.

Many products can be discounted if obtained through a consortium, and repeat customer discounts may be available. Price reductions may be available for libraries that already own/subscribe to parts of the proposed product.

Negotiating the best value may go beyond the initial purchase price. Before making a purchase, ask if there will be hosting or access fees. A few vendors charge these in the year of purchase—savvy negotiation may delay this fee until the second year as part of the purchase, especially since the majority of vendors do not charge hosting fees until the beginning of the second year.

Request a free trial, even if decision-makers are certain they want the electronic resource. A trial may uncover problematic functionality. A satisfactory trial will yield more confidence in the purchase and will effectively increase the time with the product and decrease the initial price.

Agreeing to continue a resource for a set number of years may yield a smaller increase than usual in the rate for the future.

Renewals may offer opportunities for savings. If a vendor's annual increase is higher than that of others, ask that vendor to reduce it. Many vendors

will accommodate such a request. Do not hesitate to inform vendors that enrollment is down at your institution or if the library has had or is facing some special financial challenges.

A large package of journals may be a savings opportunity, providing access to many journals for less money than the cost of the individual titles within the package. However, there are some special considerations. Many providers require that a library maintain its total "spend," which is the amount of money paid to that publisher when the agreement is entered. However, the publisher may allow an exchange of current titles for others that may be more valuable. The publisher may require that the library accept and pay for transfer titles, which are titles the package provider acquires from another publisher.

Document all special pricing, promises, and deals for future reference. The Dean B. Ellis Library Acquisitions unit maintains and refers to a spreadsheet that lists all our electronic resource purchases and subscriptions, and provides basic information such as the name and contact information for billing-related problems and unique promises, purchase and subscription dates, the last invoice amount, and date paid. It also notes which vendors charge by FTE so we know to notify those representatives when ours changes.

The person responsible for licensing agreements varies greatly from institution to institution.

After acquiring a new electronic resource, be certain to let constituents know. These constituents would include public services and other affected librarians and faculty, the person who incorporates the resources on the library website, and perhaps others. Conversely, if a resource is discontinued all those same people need to be notified.

In addition to providing quotations and perhaps supporting discounts, some vendor representatives can provide overlap analysis showing weaknesses in collections or areas in which there is more coverage than needed. Many can provide promotional materials such as posters, advertising flyers, bookmarks, and so on.

Electronic resources include other digital opportunities beyond subscriptions and purchases.

Open access is quite controversial at this time, and although there are predatory journals, there are also a number of reputable publishers who grant free access to legitimate and valuable content.

Digital preservation is the method of keeping digital material accessible and usable for the future, even as

technological advances make original hardware and software obsolete. LOCKSS, CLOCKSS, and Portico are organizations that have stepped in to ensure that today's digital information does not go the way of the audiocassette and eight-track tapes.