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A Case Study: Integration of eBook Packages into Selection Workflows at a Research University

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Case Study

Integrating publisher eBook collections into a monograph collection development workflow, including how a library is using a book vendor to manage those workflows.

Introduction

eBooks came onto the scene in the early 2000s. At first, there was a trickle of options but, as time progressed, libraries were bombarded with offerings. As recently as 2011, eBooks accounted for only 35% of publishers' simultaneous eBook/print book output, but now eBooks account for approximately 57% of simultaneously published titles. Today there are numerous aggregator and publisher platforms to choose from. In addition to those platform choices, there are multiple user models (1 User, 3 User, Unlimited User, DRM-Free, etc.) that add to the complexity. Along with those user models, a library can purchase publisher collections, subscription packages, and title-by-title orders. Often balancing the integration of eBooks into a collection policy can cause confusion and problems.

For one large research library, the path to achieving this balance has been bumpy. But, when a new Associate University Librarian (AUL) came on board, they were tasked to make a change.

Background

UC Berkeley has long participated in the consortial purchasing of journal packages and eBook bundles or collections. They have also purchased eBook collections locally. As a larger institution with a comprehensive collecting philosophy, packages seemed like the best return on investment for the library because of the cheaper costs and some economies of scale.

However, this practice was causing a lot of confusion for selectors. Acquiring eBooks from consortial collections and local packages meant that the material was outside of their traditional selection workflow. Selectors were never sure what was coming in as part of the collection and there was fear of duplication. They would often pass on buying a title, thinking it would be part of an eBook collection. Then, they felt cheated if it was not. With cataloging delays sometimes taking up to six months for a record to become available, this was causing other problems. As a result, the selectors were concerned about their reputation with faculty, users having access to the content, and how these delays could affect the budget.

Jo Anne Newyear-Ramirez came to UC Berkeley in August 2016 as the AUL for Scholarly Communications. Before that, she was at **University of British Columbia** for ten years as the Associate University Librarian for Collections.

When hired to take the reins at UC Berkeley, she was tasked with addressing the issues that revolved around the acquisition of eBooks. Addressing the confusion over eBooks was a priority when taking on this new role. To do this, she had to solve that issue around the lack of information of what was contained in the eBook packages and collections.

The Approach

At UC Berkeley there is a heavy print focus when it comes to the acquisition of content, particularly in the social sciences and humanities. Not having visibility into what was included in an existing eBook collection or what was already owned was causing problems and wasting time. Selectors were going from a publisher's website to the library catalog when trying to determine whether a title was already owned. Furthermore, they would send a question to Acquisitions regarding whether a title was included in an eBook collection when they couldn't find it in the catalog. Since titles purchased as part of an eBook collection were not visible in their daily selecting workflow, selectors were unsure of whether they were duplicating material they already had access to. The confusion over how to handle eBook collections was causing paralysis.

To address this problem, **Newyear-Ramirez** set out to clarify the policy and procedures at UC Berkeley. She started by reviewing the cause of this concern and from there finding ways to build knowledge and confidence. While there was no specific policy about duplication within the library, there were a variety of beliefs and practices across the selectors. She set out to draft a policy that would outline how and when duplication between eBooks and print books should occur.

The library's primary English-language vendor is **GOBI Library Solutions** from EBSCO. In a move to clarify their eBook purchasing, UC Berkeley moved publisher eBook packages and collections from being invoiced direct through the publisher to invoicing through their monograph vendor. Whenever possible, they would acquire an eBook package through their book vendor. Most of the selectors were

already sourcing their selections for individual discretionary monographic purchases through this avenue; therefore, by also purchasing eBook collections through **GOBI**, the selector would be able to see whether a title was part of a collection or not owned and available for single title acquisitions. For this library it was a great tool that allowed a more complete picture of what had and hadn't been bought. For the library, integrating this process with their book vendor provided a better picture of owned eBooks so selectors could make appropriate selections. Since this process began in 2017, the library has continued to add various other publisher packages whenever possible.

Addressing local eBook collection purchases did not solve all the problems. Consortial eBook collections were in many ways an even bigger conundrum than the local level eBook collection management. Since not all eBook collections include everything from a publisher, and often exclude things that are course adopted or textbooks, they are not always easy to track. Even keeping a list requires selectors to leave their current workflow to search for a title. It's not an efficient process. Many times selectors won't venture outside their monograph workflow, or they might not understand why content is included in one space and not the other. Because a lot of confusion came through consortial purchases, the library sought to address this in a couple of ways. First, they began to ask for a title specific list of all consortial collection titles from the consortia. Second, they started loading these holdings with their monograph vendor three times a year. By doing this, the selector could then see when the library had access to the title in some way. While this does not eliminate the possibility of duplication, it does provide a very specific process for making sure titles in eBook collections are visible to selectors and integrated into their regular workflow. Thus, for titles for which the selector is unsure, they can wait until the next load before deciding to purchase.

Newyear-Ramirez has pushed the consortia to move in a new direction; one in which the library is working more closely with a monograph vendor for purchasing consortial eBook packages. In doing this, the print or eBook titles in **GOBI** would show if a title was part of the shared eBook collection. Since many of the individual UC libraries rely on eBook packages purchased through consortia, this would benefit libraries across the UC system. In addition, this workflow would be beneficial because the information would then be in **GOBI** for each of the libraries. In the long run, integrating everything into one place allows institutions to work efficiently within all the eBook acquisition models available

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today, as they look to build their larger collections.

After two years of loading holdings and integrating eBook collections into **GOBI** workflows, the library has seen benefits of this integration. The selectors appreciate that they can now see what has been purchased or is part of an eBook collection, the questions to Acquisitions have greatly decreased, and selectors are spending down their budgets without fear of unnecessary duplication. Having eBook collections integrated into the monograph vendor workflow also gives the library a better way to view their English-language collection more holistically regardless of format, making it easier to identify and address gaps in the collection. The library is now working towards a new set of profiles that will address these disparities and better serve the users in the future. By consolidating and centralizing, they believe they have improved the efficiencies for all. 🐼

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excluded without category parameters or specific titles lists of what is being excluded.

Takeaway: When dealing with content providers, a clear scope of content included in the plan is important to define before implementation. Consider documenting specific title lists of either included or excluded titles; clearly defined publication ranges (especially if an acquisition program doesn't run concurrent with a calendar year); and a thorough understanding of how a publisher eBook platform does or does not mirror print publication lists and schedules.

Conclusion

A consortial eBook acquisition program is an exciting way to build a shared collection and rethink collection development. The ability to achieve further efficiency through a shared ILS and NZ really enables a consortium to push the boundaries of traditional monograph acquisitions. Through discounted purchasing, consolidated data analysis, and streamlining record loading, the consortium achieves economies of scale at many points throughout the selection-to-acquisition process.

Along with the possible efficiencies comes the potential for added complexity. The pitfalls and lessons learned by the **Alliance** ESG highlight the

importance of a team committed to investigating issues and identifying solutions to mitigate the impact on the larger consortium of members and users.⁴ Careful planning, detailed documentation, and constant communication are critical to avoid problems with acquisitions at a consortial scale. 🐼

Endnotes

1. www.orbiscascade.org/member.
2. **McElroy, E. and S. Hinken.** (2014). "Pioneering Partnerships: Building a Demand-Driven Consortium eBook Collection." *Against the Grain*. 23(3).
3. **Robbelloth, H., Ragucci, M., and DeShazo, K.** (2017). "Evidence-Based Acquisition: A Real Life Account of Managing the Program Within the Orbis Cascade Alliance." *The Serials Librarian*. 73:3-4, 240-247.
4. The authors wish to acknowledge the collaborative efforts of the 2017-18 ESG members in responding to issues and identifying solutions to keep the Alliance eBook program moving forward during a very complex period: **Abigail Bibee** (Reed College), **Faye Christenberry** (University of Washington), **Andrea Eickholt** (ESG Chair, Eastern Washington University), **Jesse Holden** (Orbis Cascade Alliance), **Tom Larsen** (Portland State University), **Lorena O'English** (Washington State University), **Alexander Rolfe** (George Fox University), **Michelle Weston** (Western Washington University).

Doing More with Less, Revisited: Batch Processing, Outsourcing and Data Driven Curation, Five Years Later

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Doing more with less — this is a common theme we hear in libraries. In 2013, we presented at the **Charleston Conference** on this topic, followed up by an article in *Against the Grain*.¹ From 2010 to 2013 **Grand Valley State University (GVSU) Libraries** spent time exploring batch processing and outsourcing technical services and collection curation. We outlined projects utilizing these techniques, talked about our approach and reflected on early results of these projects. When recently approached to explore the topics of outsourcing, curation automation, and efficiencies in technical services it seemed like a wonderful opportunity to revisit some of the examples five years later. Pre-processing services, data-driven curation of the collection, vendor provided MARC records, and "internal outsourcing" were examples we felt could use a fresh look.

We have lived with our theory of "Good Enough" for some time and continue to find it useful. With limited resources we need

to determine how to allocate a finite amount of staff time and operating budget. For us this theory of "Good Enough" is the attempt to balance the investment of people and budget versus the impact any particular service or procedure may have for our users; the larger the impact, the more likely we are to dedicate time and money. It's common for service-minded professionals to want to do their very best at every task for our patrons. This drive is one of the key factors in a great library and a positive work culture. But with widespread dips in enrollment translating into budget constraints, it is simply impossible to be the very best in every service we offer. Libraries must continue to ask ourselves, our faculty, and staff what can we get done with the resources we have? What is the alternative for this project if we cannot be "perfect"? For **GVSU**, this thought process boils down time and time again to what will ultimately benefit our patrons the most. Library leadership

must continue to balance the resources at hand to provide the best possible service to our patrons. The examples that follow are updated, and show how **GVSU Libraries** streamline or outsourcing work.

Pre-processing Services

In our presentation and article from five years ago, we provided examples of why pre-processing services from vendors can be a way for libraries to save time and get materials to users in a much shorter time frame. These services include application of call numbers, barcodes, RFID tags, and property stamps on materials. Having the vendor do this processing work allowed us to keep up with the incoming materials, while only having one cataloger and ten to twenty hours of student help per week. We saw our processing time per book drop from eight to ten minutes per item to two to three minutes per item on average. Over these past five years, we've seen our books budgets begin to decrease due to the need to allocate funds away from print materials to support other formats and resource types as well as budget cuts. These reductions in funds, and

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