

# Prioritizing Use and Access

## Refining the Orbis Cascade Alliance Consortial Ebook Program

### Alliance Ebook Program Overview

Since 2011, the Orbis Cascade Alliance has developed a consortial e-book collection founded on the following charge:

- Establish shared consortial-wide access to titles purchased by member libraries
- Develop an equitable funding model that supports the selection of materials that most benefits all member libraries

The Ebook Working Group, a subset of the Collection Development and Management Committee, provides leadership and oversight for the program. The committee members examine all components of the program, such as business models, use statistics, and purchasing patterns. They use this information to effectively work with their YBP and EBL vendor partners to maximize the benefit of the program to the Alliance members.

### Benefits of DDA

- Immediate delivery of content that meets researcher needs.
- Makes more content available for discovery.
- Provides a shared pool of owned resources that are available to all Alliance institutions.
- Funds access to a much broader pool of content in an e-format that is currently unavailable for traditional ILL.
- Strengthens interdisciplinary offerings that may fall outside of selector purview.
- Money spent on relevant and used material.

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Serin Anderson, Chair E-book WG Saint Martin's University

Sara Seely, Member E-book WG Portland Community College

### DDA program: the basics

#### What is "use" in our DDA?

- Unowned browse = up to 5 minutes of viewing
- Unowned loan = over 5 min. or print/copy/download
- Owned browse = up to 10 minutes of viewing
- Owned loan = over 10 min. or print/copy/download

#### The STL or Short Term Loan

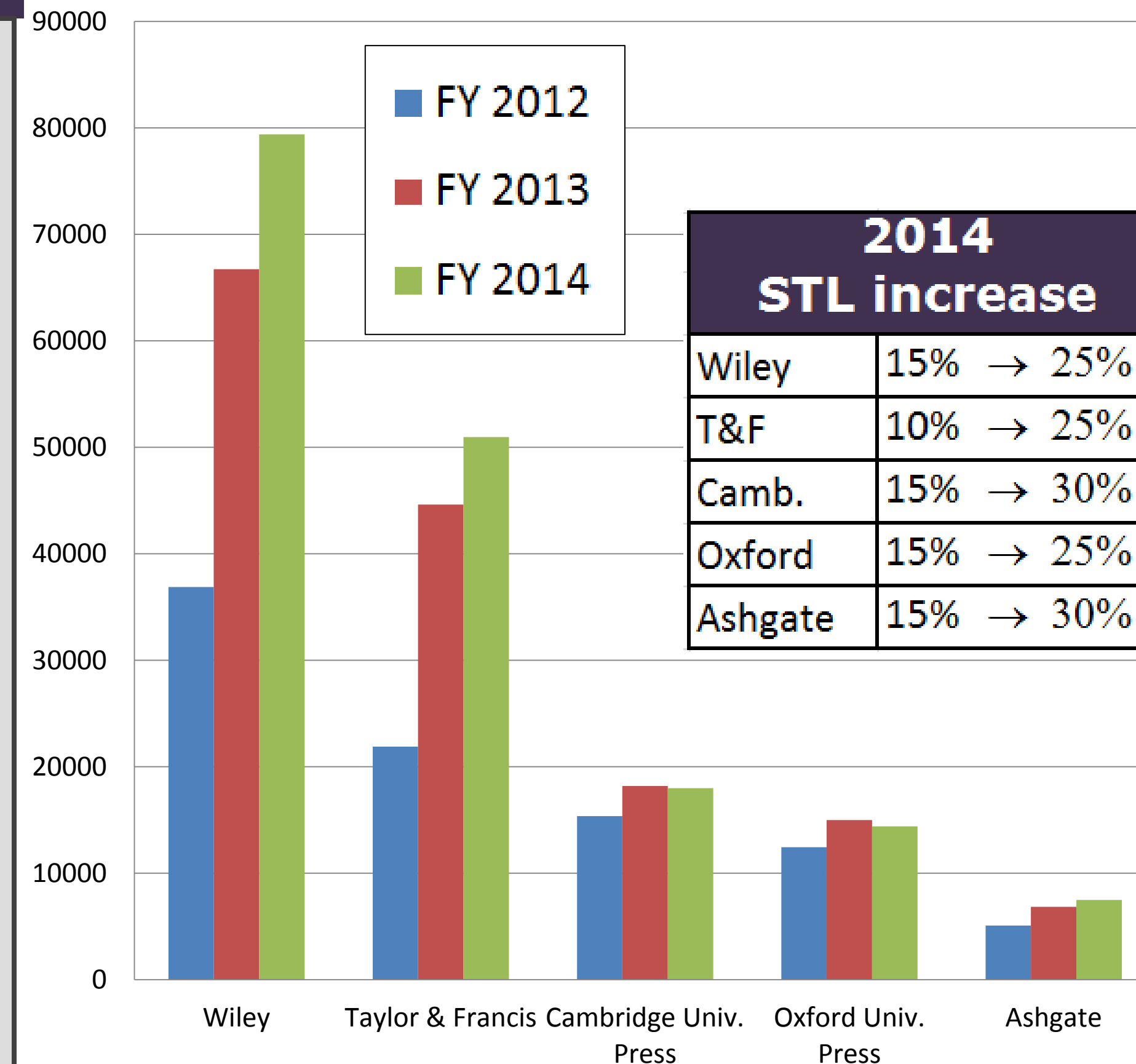
- Our current trigger is set at 15
- Once a book triggers a 16<sup>th</sup> STL, it is purchased at five times list price.

#### The Content Pool

- Primarily 2012 forward (excluding earlier purchases)
- Price cap set at \$ 250.00
- Publishers with STL costs (% of list price):

ABC-CLIO (10%)	Oxford UP (25%)
Ashgate (30%)	Sage (15%)
Brill (15%)	Taylor & Francis (25%)
Cambridge UP (30%)	Univ of Calif Press (5%)
John Benjamins (25%)	Univ of Minn Press (15%)
McFarland (5%)	Wiley (25%)
Morgan & Claypool (15%)	NYU Press (25%)

### Top five publishers by usage data



### DDA program: the future

#### Ongoing program initiatives:

- Continue discussions with publishers and aggregators on adjustments to our existing model to support long-range sustainability and equity for all parties in a rapidly changing marketplace.
- Evaluate the use and cost effectiveness of the ebrary Academic Complete subscription.
- Work with the Alliance Assessment Team to evaluate satisfaction with the e-book program and measure return on investment.
- Finalize a walk-in policy for Alliance institutions.
- Monitor spending given the new program modifications and recent STL price increases and make adjustments as necessary to manage the annual budget.
- Monitor publisher perceptions and e-book marketplace to gauge potential changes (please see handout).

### Challenge: Equity of budget model

Timeline	Budget models
<b>July, 2011</b> Pilot project implementation	<ul style="list-style-type: none"> <li>• Required participation by all alliance institutions</li> <li>• Funding based on tiered FTE scale</li> <li>• Total funding for pilot: \$ 231,000</li> </ul>
<b>February, 2012</b> DDA Report	<ul style="list-style-type: none"> <li>• Working Group evaluated eight DDA budget models using different combinations of two or more of the following components: equal distribution; FTE; materials budget; usage</li> <li>• Concern from the Board about factoring in use because of potential incentive to discourage use.</li> <li>• Final recommendation: 30% equal split, 35% FTE, 35% materials budget</li> <li>• FY 13 budget set at \$750,000 <ul style="list-style-type: none"> <li>• Equal</li> </ul> </li> </ul>
<b>February, 2013</b> DDA Report	<ul style="list-style-type: none"> <li>• Working group recommends retention of the FY13 funding model.</li> </ul>
<b>February, 2014</b> Ebook Report	<ul style="list-style-type: none"> <li>• Working group identifies concerns with the disparity in cost per use in the existing budget model and recommends inclusion of use in order to move towards a more equitable budget model.</li> <li>• Council approves FY15 budget model: 20% equal distribution, 30% FTE, 30% materials budget, 20% use</li> <li>• Budget for FY15 remains at \$1,000,000 but will be split between DDA and subscription to ebrary Academic Complete (approximately 80/20)</li> </ul>

### Challenge: Balancing Ownership and Access

Challenges	Responses
<b>July, 2011</b> Primary goal of shared ownership.	<b>September 2011</b> Based on use and low expenditure rate the STL trigger reduced to 5 and the pool was expanded to include content from 2009 – 2011.
<b>March, 2012</b> Reaching max budget	<b>Early March, 2012</b> Purchase trigger raised from 5 to 8
<b>May-August, 2012</b> Funding completely spent and new strategy needed to manage funds in FY12.	<b>Late March, 2012</b> Purchase trigger raised to 10
<b>March, 2013</b> Need to control costs again	<b>May-August, 2012</b> Suspended purchases until Fall. Working group opted to remove unpurchased content prior to 2011 to reduce content pool and control costs, which caused concern with program regarding assumption of continued access to content.
<b>Spring, 2014</b> Members express consistent desire for more content	<b>March, 2013</b> Purchase trigger raised from 10 to 15
<b>July, 2014</b> Working group is notified that a number of DDA publishers were raising STL rates significantly	<b>Summer, 2014</b> After evaluating Ebook subscription packages, the Working Group recommends moving a portion of the budget to fund ebrary Academic Complete, with a subscription starting September 2014
	<b>August, 2014</b> Working group approves removal of 4957 titles (primarily 2011 imprints) or those that had price increases over our cap. Also directly purchased 267 titles with 12 or more STLs at 6+ libraries. Group continues discussion and evaluation of STL trigger and price cap.