

Annual Report of the Ebook Working Group, March 2015

Committee members

Serin Anderson, Chair (Saint Martin's University)

Jim Bunnelle (Lewis & Clark College)

Linda Di Biase (University of Washington)

Tom Larsen (Portland State University)

Sara Seely (Portland Community College)

Nancy Sprague (University of Idaho)

Kathi Fountain, Staff Liaison (Orbis Cascade Alliance)

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Executive summary

“DDA may disrupt the entire scholarly communication supply chain, therefore libraries, publishers, and aggregators must be committed to working together to establish long-term sustainable models that highlight mutual benefits.”¹ The summer 2014 NISO report on demand driven acquisitions makes it very clear that we are in a period of signal transition; however, the program is well used and valued by consortia members, and the Working Group plans to spend the next year looking at options for balancing value within this volatile environment.

Recommendations

1. Continue the current e-book program, which is now divided between the EBL DDA and the ebrary Academic Complete subscription (approximately 80% DDA and 20% ebrary). The coming fiscal year will mark the first time that all institutions in the Alliance will be accessing the same set of centrally managed DDA records from a PRIMO discovery layer and all will have access to a centrally funded subscription ebook product. Given these significant changes, the Working Group advocates for a period of program stability while these changes are measured both internally and in conjunction with the Assessment Team's report due Summer 2015.
2. Maintain the current program budget at \$1 million and continue the present funding allocation model of 30% FTE, 30% budget, 20% equal distribution and 20% use. A static budget will allow the current program to continue while the Working Group evaluates the impact of centrally managed records, the overall effect of short term loan increases, and the introduction of a subscription product. A stable budget and

¹ National Information Standards Organization [NISO]. (2014). *Demand driven acquisition of monographs*. Retrieved from: <http://www.niso.org/workrooms/dda>

allocation model also provides an opportunity to assess the effect that changes in use will have on institutional invoices for FY16.

3. [Actively explore alternative models of consortial e-book acquisition including evidenced based purchasing models, other DDA programs or restructuring our current DDA.](#)

While the Working Group recommends a period of stability for both the budget and program model, given the volatility of the publisher responses to DDA (see [DDA Landscape](#)), it is crucial that the Working Group continue to explore other market alternatives. These range from evidenced based purchasing from vendors like Project Muse, alternate DDA programs such as the new JSTOR model or the possible restructuring of our current EBL DDA via a renegotiated multiplier/STL trigger.

DDA Landscape

At the 2013 Charleston conference, many academic publishers – particularly from university presses – expressed concerns about declines in revenues related to DDA programs. At the 2014 Charleston conference, YBP presented data demonstrating just why publishers were worried: a sharp rise in short term loans (STLs) and a substantial reduction in purchasing decreased their overall revenue significantly. A number of university press representatives spoke about the difficulties inherent in managing falling revenues. This summer and fall, many publishers – both commercial and university presses – raised short-term loan rates to counterbalance this revenue shift (see [Budget and Funding](#)).

In January 2014, John Elliot from YBP shared three strategies publishers were beginning to consider: increasing STL costs, embargoing front list titles, and fixing the purchase trigger. We've already seen dramatic changes in STL charges, and with the very recent decision of Wiley to eliminate STLs for demand driven acquisition², DDA may be looking at a new wave of change. Ultimately, there is nothing static about either publisher reactions or the ebook marketplace. The Working Group in conjunction with the Shared Content Team will need to continue to strategize options for maintaining and enhancing return on investment for a shared and highly valued consortial resource.

Ebook Program Changes

Subscription Evaluation and Addition

In late spring 2014, the Working Group provided opportunity for evaluation and feedback of two subscription products: ProQuest's ebrary Academic Complete and a customized EBSCO academic ebook package. The evaluation process consisted of a product comparison document, two webinar presentations by ProQuest and EBSCO representatives, followed by an Alliance-wide survey. Survey data indicated a strong preference for the ebrary package (14

² In conversation with Kathi Fountain and Neil Sorensen of ProQuest, Wiley has agreed to let Orbis continue with STLs in the face of this abrupt policy change.

libraries were current subscribers at the time). With council approval, Kathi Fountain completed negotiation and licensing for ProQuest's ebrary Academic Complete subscription product in September 2014. This subscription helped the group move forward on the following goals:

- Substantially diversifying content and number of titles accessible to the Alliance membership.
- Providing more access to backfile content, particularly as the Working Group moves to an annual process of title removals to manage DDA pool size and expenditures.
- Allowing the program to mature by offering an opportunity to more thoroughly evaluate the impact of alternative models of consortial ebook access.

Communication Changes

In the initial stages of the Alliance DDA e-book program, two listservs were created for communicating changes to the program: one for institutional DDA liaisons and the second for technical services/marc records information: ddaliaisons@orbiscascade.org and dda-marc@orbiscascade.org. Beginning March 6th, these lists will be discontinued and updates and feedback will shift to Shared Content Team institutional representatives. Results from the February 2015 program survey included questions related to types and method of communication preferences. The Working Group will be evaluating the responses to determine a more comprehensive communication plan.

Budget and Funding

At the beginning of FY15, due to carry forward from FY14, the program budget started with \$923k available for DDA and \$210k allocated to the new ebrary Academic Complete subscription. The carry forward was likely due to two changes:

1. The steady but high 15 STL purchase trigger during FY14, which reduced purchasing and its associated costs
2. Ex-Libris migration activities, which inhibited patron access to the DDA program.

Based on current spending rates in FY15, all of the allocated DDA funds are projected to be expended and some modification of the current DDA parameters may be required (see Alternatives).

Despite ending FY14 with a surplus, changes in publisher STL rates and policies presented several challenges. In May 2014, the working group was notified that a number of publishers were significantly raising short-term loan (STL) rates. By the end of November, over half of the publishers in the DDA pool had raised STL rates, with rate increases ranging from 50 – 900%.

Publishers w/ Increased Rates	Old 1-Day STL		
	Rate	New STL Rate	Date Changed
ABC-CLIO	10%	15%	1-Nov-14
Ashgate Publishing Ltd	15%	30%	1-Jun-14
Cambridge University Press	15%	30%	1-Jul-14
John Benjamins Publishing Company	15%	25%	1-Jul-14
McFarland & Company, Inc., Publishers	5%	50%	1-Feb-14
NYU Press	5%	25%	1-Jul-14
Oxford University Press	15%	25%	1-Jul-14
SAGE	5%	25%	2-Jan-15
Taylor & Francis	10%	25%	1-Jun-14
Wiley	15%	25%	1-Aug-14

To offset the STL increases, the following cost containment measures were put in place:

- Removal of the 7 day download option
- Identification and removal of titles over the \$250 threshold cap
- Withdrawal of primarily 2011 titles (total removal 4957).

Prior to the withdrawal, 268 titles with significant consortial use – those with 12+ uses by 6 or more libraries – were directly purchased.

While the Working Group has recommended maintaining a stable budget for this fiscal year, it will require close monitoring of both the pool and spending rates to stay within budget.

Technical Issues

Alma

While the Ebook Program does have a number of technical issues to work through in the coming year, there have been notable successes. In January 2014, Bob Thomas successfully created bibliographic records and portfolios for DDA records in the Alma Network Zone. One year later, Kathi Fountain centrally manages regular additions and deletions for all DDA records for all Alliance institutions. This is a significant achievement and one of the first realized gains from the shared ILS. Additionally, in September 2014, Bob Thomas identified and implemented a mechanism to display a public note indicating ownership status for DDA records. Purchased books now display, “Orbis Cascade DDA Purchased Resource” and unowned books display, “Orbis Cascade DDA Discovery Resource”. This now allows patrons and library staff to easily identify titles that are now a permanent part of the consortium collection.

ebrary Academic Complete

With the roll out of the ebrary subscription, the working group drafted a small team of record experts to investigate options for handling the ebrary records. Initially, it was hoped that the records could be centrally managed in the Network Zone; however, technical issues stemming from ProQuest institution specific URLs made that unworkable. Based on Working Group input

and their own investigation, the Collaborative Technical Services Team issued an Alliance wide policy in December 2014, stipulating that all institutions should activate the ebrary Community Zone collection, clean up institutionally loaded records and ensure that OCLC holdings were deleted either in WorldCat or the OCLC Knowledgebase. That decision ensured a more efficient maintenance of the shared resource, but caused concerns across many institutions because of issues with CZ record quality and currency.

There has been a multi-pronged approach for dealing with the Community Zone problems. Maria Wagner, as the SILS Cataloging Working Group chair, submitted an Alliance-wide high priority case with Ex-Libris (#00116796), and Working Group members, particularly Kathi Fountain, have been involved in repeated discussions with ProQuest representatives regarding both record updating and record quality. Some progress is being made. By the end of March 2015, the process of additions and deletions for Academic Complete records will be fully automated. This will eliminate the need for individual institutions to create procedures to manage the now twice-yearly scheduled withdrawals for the CZ collection. Conversations about record quality will continue with both Ex-Libris and ProQuest, although a possible record match problem has been identified with the help of record examples submitted by Alliance members.

[Alternatives to current DDA model](#)

As noted in the recommendations, the group must continue to proactively monitor options open to the Alliance given the volatility of the DDA marketplace. In January 2015, Kathi Fountain met with JSTOR and Project Muse representatives at ALA to hear their initial information on pilot programs with consortia. The Working Group plans to investigate but not move on either of these plans this fiscal year. However, the Group will be examining options for the current DDA program.

Possible Revision of Current DDA

Many presentations at the recent Charleston conference and others have highlighted one important fact: the Alliance DDA multiplier is much higher than many other consortia. While the timing of the DDA implementation and the size of the consortia should be taken into account, the Working Group has heard from ProQuest that publishers may be willing to renegotiate. Multiplier changes could feasibly take months of discussion, so shorter term changes such as lowering the price cap for titles entering the DDA pool will be vetted as well. These options will be actively pursued during the next few months.

JSTOR DDA

The initial details on a JSTOR DDA include: entry-level consortial deposit of \$150,000, no short term loans, and DRM free access to titles. However, the preliminary conversation indicated a

multiplier in excess of 5. Like Project MUSE, there is some duplication of content with the current DDA and the ebrary subscription. The Group will continue to monitor this option.

Project MUSE and Evidenced Based Purchasing

Project MUSE is actively recruiting consortium participants for a new evidenced based purchasing model. The plan includes profiling, usage statistics at the institution level, DRM free PDFs, and titles with an average list price of \$100.00. Initial deposit for a single institution is currently set at \$50,000 and there have been no specific negotiations on either the requirements for an initial consortial deposit or multiplier.

Potential benefits of a MUSE evidenced based plan:

- Access to a much broader array of university press content. Most publishers on the platform have agreed to participate in this early pilot phase.
- Expenditures driven purely by purchases, not STLs.
- A clearly defined spending plan that can be structured to permanently collect titles used broadly by a mix of institutions.

Possible drawbacks of the MUSE evidenced based plan:

- Specifically, with Project MUSE, some institutional members have already committed to purchasing significant portions of the MUSE collections. These are already available to consortium members via interlibrary loan.
- Purchasing would be limited to those publishers available through MUSE.
- Depending on the deposit, a program like this could severely curtail the current DDA program which continues to see strong use and support.

MUSE is not the only platform or publisher with evidenced based purchasing. The Working Group will continue to monitor evidenced based options in the marketplace.

Ebook Program Value to Institutional Members

The Alliance Ebook Program continues to see strong support from the member institutions. Almost 92% of respondents to the 2015 annual program survey³ think the overall program is successful – up almost 4% from the previous year. The addition of the ebrary Academic Complete subscription was positively received with over 70% of respondents indicating some level of satisfaction with the decision while less than 7% were dissatisfied. Sample comments from the survey:

- “This is truly a consortial effort -- more content than we could ever access/purchase on our own, and it takes minimal effort, on our part, to maintain.”

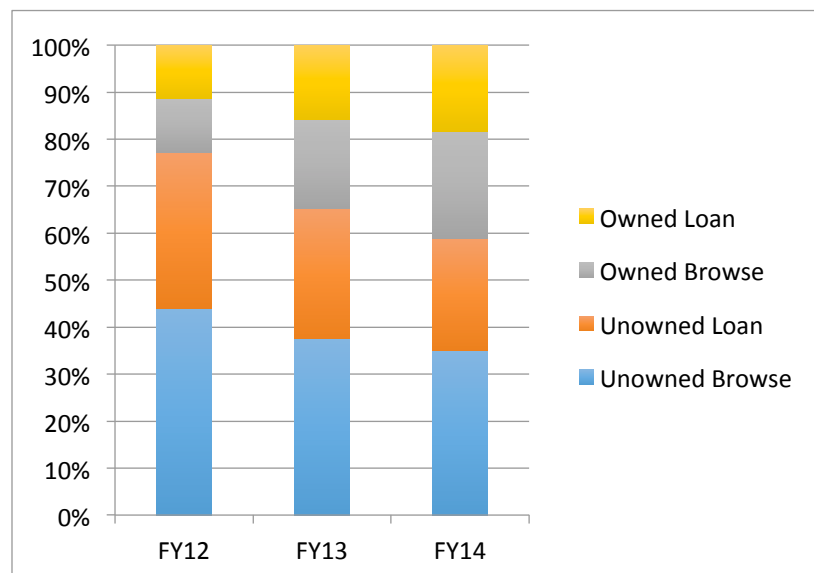
³ 2015 Survey received 64 responses. Just over 75% (28 of 37) of institutions submitted self-identified responses, while 9 responses were received with no institutional affiliation. The survey was open to all library staff, so more than one person could respond from any given institution.

- “Patrons have access to many more eBooks than we could afford to buy on our own.”
- “One success metric I see is that I see that a number of books I investigate to purchase are already available via the O-C program or Ebrary Academic Complete! I recognize that there are issues with the program, but I think it is valuable and worth the investment.”

Among the respondents who see the program as less successful, reasons ranged from overall institutional costs balanced by low usage, the gradual shift in emphasis from ownership to access and lack of appropriate content (particularly for highly technical schools).

Use Trends

Trends in overall use varied considerably this past year. In the previous year, all but one institution showed increased usage, but this year, 26 of 37 institutions show increased use. It is difficult to determine the impact of the migration on overall use as issues were worked out with record maintenance and as staff, faculty and patrons acclimated to new discovery interfaces. For example, of the 11 institutions with declining use, five were from cohort four and it is unknown how later cohort institutions handled regular updates to DDA records as they transitioned to Alma/Primo. In the coming year, the use of DDA titles may continue to see changing patterns as all institutions incorporate the ebrary subscription titles. The collections differ drastically in size with the DDA averaging approximately 17-18,000 records and the ebrary subscription with 100,000+ titles. For some institutions, the addition of ebrary will significantly alter the ebook results received in the discovery layer and ultimately may alter use patterns for DDA.



The overall use of purchased DDA content continues to exhibit evidence of long-term value for members. In the chart to the left, the proportion of owned loans and owned browses – which trigger no additional costs – show a positive trend in proportionate use over time as the collection increases in size and the titles continue to receive ongoing use.

For the initial six months of the ebrary subscription, twenty-five schools show use, with some institutions demonstrating extensive use (see Appendix 2). Looking at access to unique documents, current costs per unique document is running just over \$8.00 per item, but that is

with only 6 months of use and short twelve schools. The Working Group will be reaching out to the remaining institutions to confirm full Alliance participation and it is anticipated that this will ensure a considerable return on investment for this aspect of the program.

Coming year

The Working Group will also be following up on a number of outstanding issues during the coming year:

- Creating a structure for annual DDA withdrawals to manage DDA pool and budget
- Responding to the Assessment Team's report on the ebook program
- Assessing the ebrary academic complete subscription to include evaluating use data, return on investment, and technical improvements to CZ record quality
- Working with YBP and ProQuest to manage deduplication between the new subscription and DDA
- Finalizing a walk-in policy for the DDA program with the Shared Content Team

Appendix 1

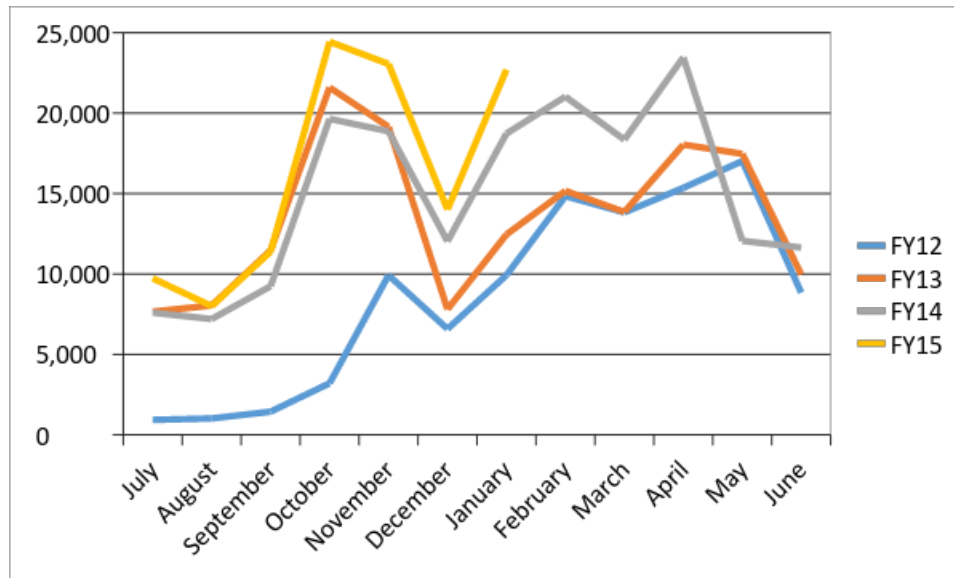
Demand Driven Acquisitions Program: Data

Prepared February 2015

Use by Library: July 2011-December 2014

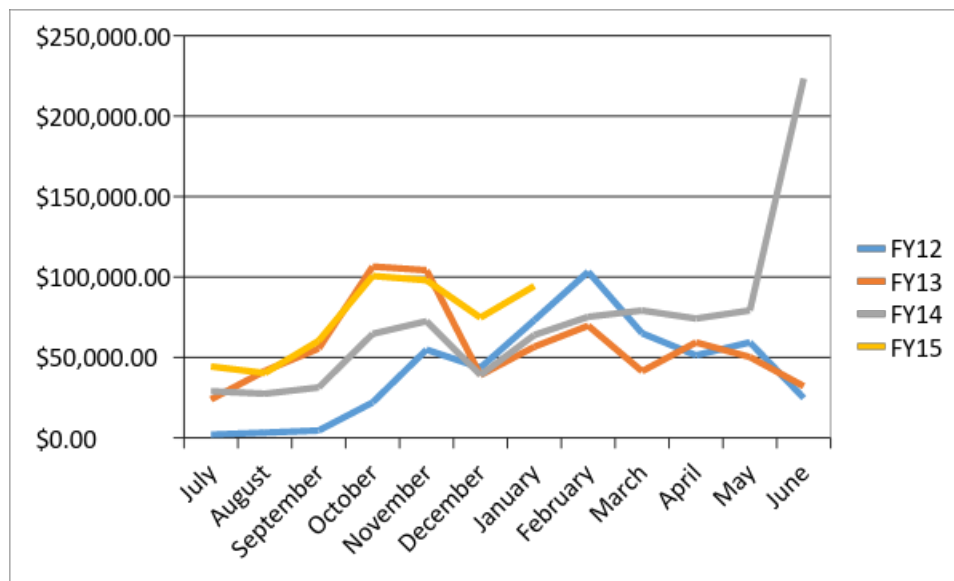
Library	FY12	FY13	FY14	July- Dec 2014	Change in Use: FY12 to FY13	Change in Use: FY13 to FY14
Central Oregon Community College	832	1693	1289	804	103.49%	-23.86%
Central Washington University	2998	3935	4847	2701	31.25%	23.18%
Chemeketa Community College	572	972	835	258	69.93%	-14.09%
Clark College	2723	3756	3000	1183	37.94%	-20.13%
Concordia University Portland	1635	2280	1893	843	39.45%	-16.97%
Eastern Oregon University	646	1017	1549	776	57.43%	52.31%
Eastern Washington University	1275	2295	2791	931	80.00%	21.61%
Evergreen State College	3340	5347	5755	1182	60.09%	7.63%
George Fox University	2253	4033	2853	2151	79.01%	-29.26%
Lane Community College	1174	1294	1320	501	10.22%	2.01%
Lewis and Clark	2478	3830	3954	1435	54.56%	3.24%
Linfield	925	1307	1394	332	41.30%	6.66%
Marylhurst University	567	1597	1528	992	181.66%	-4.32%
Mount Hood Community College	0	927	1300	635	n/a	40.24%
Oregon Health & Science University	1252	1272	2486	1470	1.60%	95.44%
Oregon Institute of Technology	706	1468	1809	440	107.93%	23.23%
Oregon State University	6202	9039	4934	3537	45.74%	-45.41%
Pacific University	1457	1850	1994	1078	26.97%	7.78%
Portland Community College	3285	5009	6216	2474	52.48%	24.10%
Portland State University	10674	14273	16536	8878	33.72%	15.86%
Reed College	2376	2641	3116	1404	11.15%	17.99%
Saint Martin's University	692	1038	850	563	50.00%	-18.11%
Seattle Pacific University	2727	3393	5350	2233	24.42%	57.68%
Seattle University	4564	7544	9476	3732	65.29%	25.61%
Southern Oregon University	1244	2361	2674	841	89.79%	13.26%
University of Idaho	448	3225	4964	2233	619.87%	53.92%
University of Oregon	7170	14100	15260	8301	96.65%	8.23%
University of Portland	1522	1817	2558	1394	19.38%	40.78%
University of Puget Sound	2409	2580	3779	968	7.10%	46.47%
University of Washington	16162	27193	39880	18221	68.25%	46.66%
Walla Walla University	1093	1415	1385	642	29.46%	-2.12%
Warner Pacific College	666	510	387	141	-23.42%	-24.12%
Washington State University	6514	12018	12071	9879	84.49%	0.44%
Western Oregon University	1436	2642	2877	1079	83.98%	8.89%
Western Washington University	6237	2642	12212	4290	-57.64%	362.23%
Whitman College	1063	1396	1525	875	31.33%	9.24%
Willamette University	1595	1963	1887	1242	23.07%	-3.87%

Monthly Use: July 2011- January 2015



	FY12	FY13	FY14	FY15
July	931	7,661	7,595	9,733
August	1,020	8,041	7,198	8,002
September	1,440	11,469	9,242	11,394
October	3,206	21,600	19,645	24,440
November	9,924	19,148	18,870	23,059
December	6,584	7,804	12,030	14,011
January	9,926	12,455	18,733	22,703
February	14,840	15,168	21,027	
March	13,828	13,856	18,347	
April	15,354	18,043	23,470	
May	17,022	17,470	12,062	
June	8,837	9,969	11,647	
Total	102,912	162,684	179,866	113,342

Monthly Expenses: July 2011 – January 2015

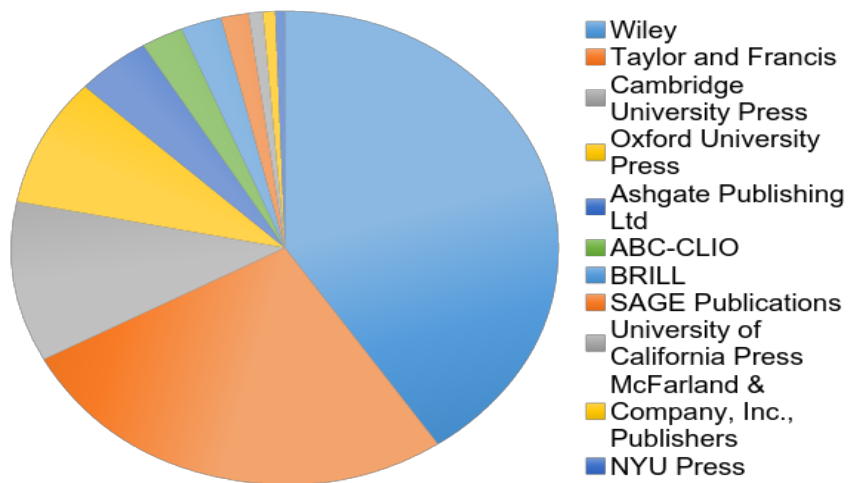


	FY12	FY13	FY14	FY15
July	\$1,979.87	\$23,883.79	\$28,991.78	\$44,377.23
August	\$3,233.18	\$41,584.18	\$27,434.56	\$40,258.62
September	\$4,560.10	\$55,527.08	\$31,323.93	\$60,343.53
October	\$22,000.91	\$106,495.68	\$64,646.67	\$100,631.65
November	\$54,779.41	\$104,213.33	\$72,527.34	\$97,967.19
December	\$43,591.50	\$39,006.49	\$39,006.49	\$74,737.29
January	\$73,155.59	\$56,617.31	\$63,922.09	\$94,384.06
February	\$103,271.08	\$69,706.74	\$75,237.30	
March	\$65,014.00	\$41,388.35	\$79,168.22	
April	\$51,303.36	\$59,343.78	\$74,162.83	
May	\$59,380.80	\$50,233.95	\$79,208.14	
June	\$24,730.57	\$32,121.33	\$223,416.33	
Total	\$507,000.37	\$680,122.01	\$859,045.68	\$512,699.57

Top 10 Publishers by Total Use

Publisher	FY12	FY13	FY14	1 st Half FY15	Total
Wiley	26,848	66,726	79,392	35,353	208,319
Taylor and Francis	17,362	44,634	50,957	23,841	136,794
Cambridge University Press	12,115	18,189	17,994	8,009	56,307
Oxford University Press	9,018	14,996	14,409	6,730	45,153
Ashgate Publishing Ltd	4,694	6,853	7,491	3,562	22,600
ABC-CLIO	3,425	4,451	2,997	1,895	12,768
BRILL	2,613	3,441	4,590	1,765	12,409
SAGE Publications	1,063	2,389	3,342	1,562	8,356
University of California Press			1,947	2,404	4,351
McFarland & Company, Inc., Publishers			1,692	2,013	3,705
NYU Press			1,399	1,519	2,918

Top 10 Publishers, by Total Use:
July 2011-Dec 2014



Appendix 2

ebrary Academic Complete Subscription: Data

Prepared March 2015

Ebrary Academic Complete Use by Institution
15 Sept 2014 – 28 Feb 2015

Institution	Unique Documents	Pages Copied	Pages Printed	Full Title Downloads
Central Oregon Community College	429	48	573	140
Central Washington University	840	140	3561	119
Clark College	1158	227	1715	58
Eastern Oregon University	159	22	611	11
Eastern Washington University	799	253	4250	68
Lane Community College Library	374	113	763	57
Linfield College	261	159	1391	23
Marylhurst University	511	312	3953	137
Oregon Health Science University	482	44	3463	75
Oregon Institute of Technology	443	49	2017	11
Oregon State University	1791	336	16898	237
Portland State University	4448	1022	47267	852
Saint Martin's University	712	297	1612	69
Seattle Pacific University	1266	431	3465	125
Seattle University	494	172	4258	155
University of Idaho	2147	331	6548	405
University of Oregon	126	41	1923	25
University of Portland	296	116	1395	36
University of Puget Sound	942	335	6271	45
University of Washington	4959	1994	54515	1234
Warner Pacific College	22	7	0	3
Western Washington University	1897	694	12404	103
Whitman College - Penrose Library	323	163	2150	25
Willamette University	698	96	5827	52
Grand Total	25578	7402	186830	4065

Ebrary Academic Complete Use by Subject Area (top 25)
15 Sept 2014 – 28 Feb 2015

Institution	Unique Documents	Pages Copied	Pages Printed	Full Title Downloads
SOCIAL SCIENCE	3337	1124	25811	418
BUSINESS & ECONOMICS	2129	472	13381	342
HISTORY	2039	385	10333	271
MEDICAL	1772	505	14997	250
POLITICAL SCIENCE	1697	519	11982	301
SCIENCE	1577	330	13313	204
PSYCHOLOGY	1463	396	9145	187
LITERARY CRITICISM	1249	407	6415	138
EDUCATION	1097	197	6253	200
TECHNOLOGY & ENGINEERING	1040	165	17617	179
RELIGION	919	542	5066	200
LANGUAGE ARTS & DISCIPLINES	878	196	8503	160
COMPUTERS	818	169	6671	221
PHILOSOPHY	702	163	3715	98
LAW	531	338	5748	82
PERFORMING ARTS	468	165	2817	74
ART	395	84	1187	79
ARCHITECTURE	368	27	1378	172
MUSIC	358	56	4423	36
NON-CLASSIFIABLE	353	697	2704	68
BIOGRAPHY & AUTOBIOGRAPHY	347	66	1124	44
NATURE	261	18	1737	41
MATHEMATICS	239	16	2557	39
REFERENCE	201	60	2361	44
FOREIGN LANGUAGE STUDY	145	36	2156	33

Ebrary Academic Complete Use by Publisher (top 25)
15 Sept 2014 – 28 Feb 2015

Publishers	User Sessions
John Wiley & Sons	4212
University of California Press	2280
Oxford University Press, USA	1782
Routledge	1694
Oxford University Press, Incorporated	1105
Cambridge University Press	943
Harvard University Press	925
Oxford University Press	845
University of Minnesota Press	776
Ashgate Publishing Ltd	754
NYU Press	743
University of Chicago Press	690
Oxford University Press, UK	631
Wiley-Blackwell	603
Yale University Press	599
MIT Press	589
Jessica Kingsley Publishers	589
Left Coast Press	494
National Academies Press	488
Princeton University Press	484
Indiana University Press	472
Academic Press	462