Alliance E-Books: Wiley Usage Based Collection Management (UBCM) selection
April 19, 2017
Ebook Working Group
Summary

Wiley UBCM Commitment of $234,000 was paid ~May 2016. The Alliance (through work of Ebook Working group and Shared Content Team) needs to select titles with a UBCM selection cost of this amount or higher. Selection decisions are due to Wiley by April 30, 2017.

UBCM period: May 1, 2016 – April 30, 2017

A second UBCM access period (May 2017-April 2018) has been recommended by the Shared Content Team and Ebook Working Group. If this acquisition approach did not continue, access to Wiley UBCM pilot titles is anticipated through June 2017.

UBCM Cost Multiplier for selected titles:
Frontlist (2015-2017) = 4X list price
Backlist (before 2015) = 2X list price

39 Alliance institutions[1] participating.
>   * 27 Alliance institutions have no individually owned Wiley titles (no previously direct purchased titles).
>   * 12 institutions: EOU, OHSU, Pacific University, PSU, Reed, UI, Oregon, University of Portland, University of Puget Sound, UW, WSU, and WOU all have "owned" titles.

10,166 unique titles were used 265,381 times from May 2016-February 2017 by 39 institutions. (Excludes previously purchased title use by the 12 institutions noted above. Does not exclude duplicated titles purchased through Alliance EBL DDA.)
Less than $1/use.

Out of UBCM pool of 19,652 titles:
17,034 were published in 2014 or before – backlist (87%);
2,618 were published 2015-2018 – frontlist (13%) (2 have print publication years of 2018 – neither have substantial use).

Pricing – for the Wiley UBCM pool this year, per title cost breakdown (including multiplier):

- 1 title more than $7,000
- 3 titles between $5,000-5,999.99
- 16 titles $3000-4999.99
- 496 titles $1000-2999.99
- 903 titles $750-999.99
- 2582 titles $500-749.99
- 8825 titles $250-499.99

---

[1] Clackamas Community College joined late, therefore CCC usage is limited during the access period. Unknown if Wiley titles are available through their catalog.

- 5445 titles $100-249.99
- 1381 titles $0.00-99.99

Title Selection:

Wiley provided May 2016-February 2017 (10 months of data) on 3/31/17. (It takes about 4 weeks for Wiley data team to present usage data to EWG.)

No dashboard exists to pull UBCM data ourselves, either at Alliance parent level or individual institution level. Institutions can pull their own ebook data, but if they have previously purchased ebooks, there is no way to isolate UBCM usage or titles.

3-Prong Selection approach:

1st prong – top titles by each institution, top 7 titles used by each institution.

2nd pass – broadest used titles across institutions, titles used by 6 or more institutions.

3rd pass – top titles in overall use, for example, titles where combined use is more than 175 uses.

Serin Anderson (UW), Steve Perisho (SPU), Linda Crook (LCC), and Andy Eickholt (EWU) on behalf of the EWG and SCT, looked at a variety of options for selection with the above three-pronged selection approach in mind. In all options, scenarios resulted in an approximate 20% frontlist/80% backlist distribution for selection.

Based on updated (Wiley EBL DDA titles removed) selection scenario 2b, three titles were selected between $2,000-$4,000, 20 titles between $1000-2000, around 117 titles between $500-999, and 396 titles selected below $499 [536 titles selected]. We did not specifically consider cost versus use. Updated scenario 2b resulted in 19% frontlist/81% backlist title selection. *[Updated Scenario 2b spreadsheet name "2017.04.20_SCTscenario2b_withDDA titles unselected AE".]*

Notes on spreadsheet "May2016-Feb2017_EWG_CustomizedWileyData for SCT, scenario 2b, 19April 2017":

Summary Sheet – includes breakdowns of scenarios with title counts and coding description as well as scenario cost following 3-pronged approach described above. ==EWG recommends proceeding with Scenario 2b.==

Sheet for 2b - filtered to show only results of the selection scenario, but can be unfiltered in column U to show all titles.

Selection prongs have been coded into column U. Click on the filter arrow to the right of the cell name to filter or limit by code (for example: 7 = Top 7 titles by institution) or broadest usage (B-7 = selected titles by broad use across number of institutions, for the Top 7 list), or top overall use (T-7 =selected titles in terms of top overall use in the Top 7 list). These codes are also listed on the summary sheet.

Code of X in column U is titles that were not selected (so can filter by X to see titles not selected at this time). The top 7 titles for each institution has been colored green in the individual institution columns at the end of the spreadsheet, to see more easily which institution had use to count as a top 7 title. Titles can fall in the top 7 for more than one institution; we did not go down the list to pull more titles in this category (since it would be difficult to manage with usage from 39 institutions).

Filter arrows can also be used to sort by title, publication year, orbis price, and to see top used titles by each institution. (For example, click filter arrow to sort largest to smallest in the EWU column AC to see top used titles by institution usage). Can also use the filter to sort by Combined Usage column (Column T) to see overall usage or Count of Libraries Using Title (column S), to see top titles in terms of broad usage by many Alliance Institutions.

"Owned" title usage by the 12 institutions with previously acquired titles has been removed from the analysis. (Need to ask Wiley to do this on our behalf assuming continue with year 2.) Institutions with Wiley titles outside UBCM have names in red in row 2.

Notes:

A primary difference between DDA (Demand Driven Acquisition) and UBCM (Usage Based Collection Management)/EBA (Evidence Based Acquisition) is the ability for a level of mediation that exists with UBCM/EBA (for example: considering priorities of the group of institutions for selection). The hope is that the 3 prong approach allows us to effectively balance the goals of the Alliance while meeting needs of individual institutions.

Per Wiley, Feb 2017: Since October 2016, Wiley began offering capability to download entire books as well as downloading by chapter. They are counting download by chapter – so if an entire book with 12 chapters is downloaded, it will be counted 12 times. Per Wiley, this is keeping with industry standards, but may result in an increase of overall usage (downloads) since October 2016. In our stats for May 2016-February 2017, we aren't able to differentiate or identify stats by entire book download or chapter. So numbers may be higher for year 2, if UBCM is continued.

Central Oregon Community College is communicating with Wiley to confirm their usage stats are accurate and IP ranges correct on Wiley's end.