

# e-Books Task Force Survey Results

## 1. Is your total overall materials budget over or under \$2.5 million? (over or under 5 million?)

- One library had a materials budget under 2.5 million
- The rest had budgets of more than 5 million dollars.

## 2. What percentage of your collection development budget is spent on e-resources?

- Varied from 19.5 % to 60 %.
- Most libraries spent between 45-55 %.

## 3. Are you tracking your e-purchases separately by category - ebooks, e-journals, e-database, other? (Can you give an estimate of what percentage of this is for e-books?)\* Most doing some degree of tracking.

- The extent of detail in the tracking was varied among the institutions surveyed.
- Percent of dollars spent on e-books varied from high of 20% to a low of 2% (Percents based on the expenditure figures provided by respondents.)
- Expenditure figures subject to re-interpretation based on fact that expenditures on some e-books or book packages may be included in e-journal or database category; e.g., EEBO and EECO.

## 4. How are you handling ordering for e-books? Is it done through your monographic ordering unit or through an electronic resources ordering workflow?

- No clear generally accepted method
- Many ordering packages or any continuation costs through their electronic resource or serials/continuations workflow
- License reviews varied depending on whether the institution had a separate group to handle that responsibility
- General desire to handle single title monograph ordering through established print order process. (This depends on having licenses in place so there doesn't have to be title by title license review)
- Works for YBP or Coutts/MylLibrary if title is available through aggregators
- Difficult for selectors to identify continuing costs -
- Tech services redirects order requests - requires advanced staff training/knowledge.

## 5. Do you have a primary source for your e-books?

- No general trend to select just one primary vendor.
- One library has EBL and one YBP as a primary vendor.
- Several libraries use YBP for title-by-title purchases either via Ebrary, EBL, or NetLibrary and purchase packages via other vendors or publishers.
- Some use both YBP and Coutts.
- Many libraries negotiate packages directly with publishers.

## 6. Are you currently ordering ebooks through aggregators (e.g. NetLibrary, ebrary, EBL)? Directly from publishers (Wiley, Springer, Elsevier, etc)? Through a book purchasing vendor (e.g. YBP, Coutts)?

- Respondents are doing all three:
  - ordering through aggregators,
  - directly from publishers
  - through a book purchasing vendor.
- Given the fact that those respondents using GOBI for title-by-title searching are typically purchasing a title from either Ebrary, NetLibrary, or EBL, the distinction between an aggregator and a purchasing vendor is cloudy at best.
- MyLibrary itself can probably be considered an aggregator and a purchasing vendor simultaneously.
- How an ebook is obtained is directly related to how it is made available.
- For title-by-title acquisition, respondents indicated a preference for ordering through a purchasing vendor. If the purchasing vendor offered several options with respect to platform or aggregator, an individual respondent might have indicated a favorite, but among all respondents there appeared to be no clear favorite. In general, for title-by-title purchasing, going directly to the publisher was a last resort.
- Respondents readily contacted publishers directly when they were interested in obtaining subject packages of ebooks.

## 7. Are you ordering e-book packages, single title e-books, or both?

- All libraries interviewed are ordering both e-book packages and "one-offs".

## 8. How are you handling special ordering and payment considerations related to sub-categories of e-books, such as e-textbooks (special licenses), e-reference books (ongoing maintenance fees), o-books (xml, personalization features), local downloadable pdf's (may require access control), e-book series (continuation po's)? For example, many e-reference books now require annual payments to maintain or upgrade access.

- Virtually no one is buying e-textbooks and few have any experience with o-books
- Libraries are split between two ways of handling e-reference ongoing fees. Some have no problem paying ongoing fees for resources that are updating (and these fees usually come out of serial funds), and others will make an one time purchase for an edition and then skip a year or two before making another one time purchase
- Few libraries have done much with how to handle download-able pdfs (there were 2 exceptions)

## 9. How important is interface when deciding whether you will purchase a title or package and from whom?

- Mixed response to this question.
- Responses ranged from the interface being very important to only somewhat important.
- Many reported that they try to have a consistent interface for end users.
- Everyone, with the exception of one responder said that if the e-book content is needed and not available on a preferred interface, they would plan to buy the e-book anyway. One person indicated that if the interface did not meet with certain technical specifications, they would not purchase the e-book.

**10. How are you handling the pre-order search/verification process and vendor assignment for single title e-book orders?**

- Majority of respondents indicated that for title-by-title acquisitions, selectors/bibliographers conducted the pre-order search/verification step.
- Some respondents acknowledged doing this step but did not specify whether the people involved were acquisitions personnel or selectors/bibliographers.
- One respondent stated that since they only ordered subject packages of titles, they did not worry about title duplication as such.
- Those respondents who regularly use GOBI (YBP) or MyiLibrary (Coutts) for doing title-by-title ordering used these vendors' web-based utilities to do their duplicate searching.
- Some respondents also checked directly with publishers' sites although it is unclear under what circumstances this was done. Several respondents mentioned that searching WorldCat/OCLC was not useful for this purpose.

**11. What are your policies for ordering e-books for e-reserves? Are you aware of any problems in this area?**

- The responses for this question were varied:
  - Different libraries needed to quickly adopt certain sets of procedures to answer a recent demand for e-reserve titles and often chose to go with a familiar non-reserve solution in order to provide access for a few rushed items.
  - General need for standardization and a more comprehensive solution for the problem of multi-usage and "turnaways".
- Currently libraries use different methods to evaluate and solve this concern:
  - some order a multi-usage copy to begin with
  - others rely on the vendor or on their own count to assess when they should buy another copy for e-reserve.

**12. Are you acquiring e-books on a subscription basis or ownership basis or both?**

- All libraries interviewed are acquiring e-books on a subscription and ownership basis, with a preference for ownership.

**13. Do you have concerns regarding the difference between perpetual access vs. perpetual ownership? Do you have a plan in place for what to do if you have perpetual ownership without perpetual access (local storage)?**

- Libraries are aware of the issue but have not actively worked to have a plan in place in case they would have to locally load content.
- Some hope that Portico or a consortial archiving answer will alleviate the issue.
- Some receive copies of the content on CDs which they store but have no plan for locally loading and serving the content. It is not an urgent enough issue to have impacted buying decisions at this point.
- They are content to have either perpetual access OR perpetual ownership specified in the license without having a plan for what to do if the downside of perpetual ownership without perpetual access already in place.

**14. How in-depth of a license review are you doing for ebook package ordering and individual title ebook ordering? For example, do you try to negotiate interlibrary loan terms?**

- All respondents review e-book licenses at least as carefully as they do for licenses of any other type.
- Some libraries don't do interlibrary loan so that wasn't a concern for them while libraries that do interlibrary loan negotiate that as part of the license agreement.

**15. Are you using or have you investigated using eBrary or MyiLibrary to host and deliver locally digitized materials?**

- With the exceptions of very few universities which have already implemented it, most Libraries are currently not interested in pursuing the option of using eBrary or MyiLibrary to host and deliver their locally digitized materials.
- Two libraries have shown some interest in pursuing a more comprehensive solution that will be based more on a regional level.

**16. Are you able to get MARC records with all of your e-book orders? Do you batch load? Do you manually catalog? If the vendor is not able to supply MARC records, what do you do?**

- All libraries interviewed try to get MARC records and batch load them whenever possible, but it is often not possible.
- For single title e-books, most libraries will manually catalog.
- There is a mix of cataloging responses to large packages without available records, collection level cataloging, waiting for vendor records, putting print and electronic on the same record, etc.

**17. Are you ordering e-audio books, download-to-portable device e-books (e.g. Kindle) or both?**

- Most Libraries not ordering audio books (2 libraries were the exception) although demand is expected to rise
- None of the libraries offer download-to-portable e-books.

**18. Are your selectors looking at going e-only for new acquisitions, particularly for regular collection development/building (e.g. approval YBP)**

- Responses to this question were mixed.
- Three respondents cited space concerns as an impetus for going e-only.
- A few mentioned differences by discipline with the sciences ready to accept e-only more readily than the humanities.
- Others reported that e-only preferences varied with each selector.
- One respondent said that most selectors were uncomfortable with e-only and only now want to use e-books as a second copy.