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Managing E-book Acquisition: The Coordination of "P" and "E" Publication Dates

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MANAGING E-BOOK ACQUISITION: THE COORDINATION OF "P" AND "E" PUBLICATION DATES

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Electronic Collections & Assessment Librarian
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Overview

- Managing Selection & Acquisition of E-Books at CU
- Strategies for Incorporating E-Books into an Approval Plan
  - Purchase Options
  - Publisher Trends
- Workflows at CU
University of Colorado Libraries

- University Libraries
  - Norlin Library
  - Business Library
  - Earth Sciences & Maps Libraries
  - Engineering Library
  - Music Library
Growth of E-Books at CU

- **2000-2004**
  - Colorado Alliance patron-driven purchase plan with NetLibrary

- **2004-Present**
  - Subject collections: Early English Books Online, Eighteenth Century Collections Online, ACLS Humanities, Knovel, Safari Tech Books Online, CRCnetBASE
  - Reference works and collections

- **2009-Present**
  - Resumed purchasing on a title-by-title basis
  - Began purchasing directly from publishers (Springer, Duke)
  - Patron Select (PDA) with Coutts
  - Integrated E-Books and print into approval plan
Goals and Benefits

- Streamline selection and acquisition of print and E-Books
- Select and acquire frontlist books on a title-by-title basis
- Share access with other libraries in the CU System
- Prevent duplication with print and other E-Book packages
- Meet needs of 30 Bibliographers/Selectors
- Provide users with materials in their preferred format
- Experiment with patron driven acquisitions
- Save time and money
Virtual Approval

- An approval plan is a systematic way to identify and select materials for your collection
  - Automatically ship materials
  - Review → Reject/Select → Ship materials
  - 30 Day Review Period
Approval Plan Profile

- Call Numbers
- Subjects
- Publishers
- Non-Subject Parameters
- Preferred Format
Publishing Sequences

- Cloth/HB → Paperback → E-book
- Cloth/HB → E-book → Paperback
- E-book → Cloth/HB → Paperback
- Simultaneous e and p
- No E-book
## Average Delay Between Print and E

<table>
<thead>
<tr>
<th>Avg # Days Print is Available Before E-Book</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Humanities</td>
<td>121</td>
<td>43</td>
<td>23</td>
</tr>
<tr>
<td>Social Sciences</td>
<td>136</td>
<td>41</td>
<td>17</td>
</tr>
<tr>
<td>Sciences</td>
<td>238</td>
<td>99</td>
<td>25</td>
</tr>
<tr>
<td>Overall</td>
<td>185</td>
<td>67</td>
<td>21</td>
</tr>
</tbody>
</table>

n=5,103       n=8,018       n=15,103
Coutts Approval Plans

- Coutts approval services
- Managing print and E-book preferences
- Options for E-book instructions
Approval Profiles

- Rules, rules, rules
- Coutts suggests, library approves
Letting Patrons Select

- Patron Driven Acquisitions (PDA)
  - Must still match approval profile
  - Coutts sends MARC record
  - Invoiced after library patron usage
- 990 publishers
- 106 added Jan-Apr 2011
- 66 university presses
On Hold for Alternate Edition

- Identify publishers on MyiLibrary by discipline
- Identify publishing sequence
- Wait [X] days for an E-book to be published
## Publisher Trends—University Presses Coutts Approvals, 2010

### Print Before E-book
- Cambridge University Press -12
- Columbia University Press -11
- Fordham University Press -18
- MIT Press -4
- Oxford University Press -4
- Princeton University Press -31
- University of California Press -8
- University of Chicago Press -71
- University Press of New England -65
- Yale University Press -53

### E-book Before Print
- Hong Kong University Press 10
- Indiana University Press 12
- McGill-Queen's University Press 29
- Oxford Scholarship Online 7
- Rutgers University Press 5
- Temple University Press 3
- UBC Press 67
- University of Wisconsin Press 4
- University Press of Mississippi 7
Options for E-book instructions

- Patron Select
  - Fewer decisions by bibliographers
  - Works well for interdisciplinary subjects
  - Casts a wide net

- Approvals
  - Bibliographer vets selections
  - More control of quality and volume
Send all available E-books

Approval – 90 day wait
- Economics
- Library Science

Patron Select – 90 day wait
- Anthropology
- Religious Studies
- Education
- Comparative Literature
- Psychology
- Business
- Biology

Patron Select – 180 day wait
- Chemistry
- Earth Sciences
- Math
- Computer Science
- Physics
- Engineering
E-books for Non-Subject Parameters

- Reference Works
- Book Type
  - Collected Articles/Material
  - Proceedings
  - Case Studies
  - Edited Volumes
  - Textbooks
- Sets and Series
E-book exceptions on print-preferred profiles

Edited Works on Approval
- History
- Germanic Studies

Edited Works to Patron Select
- Communications
- Sociology
- Women’s Studies
- Ethnic Studies
- Political Science

Reference materials on Approval
- All profiles
Benefits of E-book Approval Plans

- Helps subject selectors manage time spent collecting preferred formats.
- Allows for title-by-title purchasing of newly published E-books.
- Manages publication delay between p and e.
- Allows different instructions for approval or Patron Select profile-by-profile.
- Allows for format exceptions on different types of materials.
Approval Books & Firm Orders

Selectors
- Selectors review lists of titles that match our profile in OASIS
- Approve/Reject Approval Books
- Firm Order Slips

Acquisitions
- Acquisitions Ratifies/Approves orders
- Acquisitions downloads order records and MARC records
- Acquisitions sends invoices to Cataloging

Cataloging
- Cataloging overlays vendor MARC record with an OCLC record
- Cataloging adds a 956 My iLibrary
Patron Select (PDA) ebooks

**Selectors**
- Selectors review records in OASIS (optional)

**Cataloging**
- Cataloging receives a weekly email notification about new Patron Select titles
- Cataloging downloads the MARC records from FTP site and loads them into the catalog
- Cataloging overlays vendor MARC record with an OCLC record
- Cataloging adds a 956 My iLibrary PDA

**Patrons**
- Patrons access E-Books via our catalog or searching My iLibrary
- 2 uses triggers a purchase

**Acquisitions**
- Acquisitions receives an invoice for titles that have been used 2+ times
- Acquisitions adds an Order Record
- Acquisitions sends invoices to Cataloging

**Cataloging**
- Cataloging updates the 956 My iLibrary PDA → My iLibrary PDA Purchased
# My iLibrary E-books at CU

<table>
<thead>
<tr>
<th>Order Type</th>
<th># Titles</th>
<th>% of Collection</th>
<th>Average Price Paid</th>
</tr>
</thead>
<tbody>
<tr>
<td>My iLibrary</td>
<td>206</td>
<td>9%</td>
<td>$147</td>
</tr>
<tr>
<td>My iLibrary Patron Select</td>
<td>57</td>
<td>2%</td>
<td>$288</td>
</tr>
<tr>
<td>Purchased</td>
<td>2,074</td>
<td>89%</td>
<td>$0</td>
</tr>
<tr>
<td><strong>Grand Total</strong></td>
<td><strong>2,095</strong></td>
<td><strong>100%</strong></td>
<td><strong>$39,568.71</strong></td>
</tr>
</tbody>
</table>
Next Steps at CU

- Continue to evaluate our collection and improve our profiles
- Continue to monitor purchased Patron Select titles
- Evaluate Patron Select titles that have 0-1 uses but have not triggered a purchase with 2+ uses
- Monitoring ILL requests for new books
- Analyze survey data about faculty ebook preferences
Thank you!

- Questions?
- Comments?

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