

# Novanet Consortial DDA Pilot Project

## Final Report

### February 2014

#### 1. Executive Summary

In the spring of 2011, following Board approval, Novanet embarked on a consortial eBook DDA pilot project. Working with EBL we developed a model that emphasized access over ownership by setting a high number of short term loans (STL) before a purchase is triggered and one that also considered Novanet be a single institution so that the then typical practice of publishers charging a multiplier to the list price of two or three times list for any consortial DDA packages would not apply. This model and the pilot itself was intended to address the main reasons we began this project:

- Demonstrate whether there is a want or need for a consortial DDA eBook package
- Provide universal access to all Novanet users to the eBook package
- Streamline the work required to manage eBook packages in the ILS
- Keep costs low

The pilot ran from September 2012 until December 2013. By the end of the pilot our DDA eBook package had approximately 20,000 titles. Forty-seven books were purchased, an additional 2814 unique titles were borrowed and a total of 4152 fee-based transactions occurred during the pilot. There were a total of 19,724 views/uses and just over 3700 people used the collection. Of the \$100,000 set aside for the pilot \$60,000 was spent.

Following analysis of gathered data and two surveys of staff the Novanet eBook DDA Steering Committee makes the following main recommendations. These and other recommendations are discussed in more detail at the end of this report.

- a. That a permanent, ongoing Novanet DDA eBook program be instituted
- b. That the program be funded by members contributing \$200,000 either based on a percentage of their annual Monograph acquisition budget or based on the Novanet formula to a central Novanet account
- c. That the program be managed by the Novanet office in consultation with the Novanet Collections Coordination Group. This group will also be tasked with advising on policy for a larger, more comprehensive collections rationalization

## 2. Discussion

One of the key reasons for embarking on a pilot was to improve customer service and reduce end-user frustration by providing a collection which could be accessed by all Novanet users. Our current practice of individually loading ebook packages into the ILS by institution is a step back from the goal of a shared catalogue which was created to make titles accessible to patrons in non-owning libraries.

One other shared value of the consortium is reducing staff effort by sharing the workload of maintaining the catalogue, which was a second reason for the pilot; our current method of handling ebooks steps back from workload sharing, since each institution is responsible for its own records, even if they are duplicates of titles provided by another in the consortium. This also leaves the Novanet office with additional work involved with record loading and deleting.

Staff were surveyed at the midpoint of the pilot and again at its conclusion. Survey results indicate that staff would like Novanet to continue to create seamless access to ebooks and mitigate additional staff workloads through a consortial program. Because the pilot was meant to be seamless to the public by providing access to titles through the catalogue, their input was not formally gathered. However, many staff survey comments point to the frustration of students and staff in not being able to access titles in the catalogue, which indicates their receptiveness to a collection which would be accessible by all.

The biggest obstacle identified by staff was the depth of the negotiated collection. The project group had originally intended to offer a broad collection of close to 50,000 titles, but the vendor negotiations with publishers resulted in a much smaller title list than anticipated.

Another obstacle identified through the staff surveys was that titles were not licensed for linking in course reserves or content management systems. In a consortial system as large as ours, it was difficult to ensure this communication was received by all library staff and users, and there were a couple of instances in which these links were inadvertently added.

Ebooks represent the first time in the history of libraries where a significant amount of a library's collection is not available to be shared with other libraries through interlibrary loan. Libraries have successfully negotiated with publishers to allow interlibrary lending of electronic articles, but ebook interlending licensing requires work.

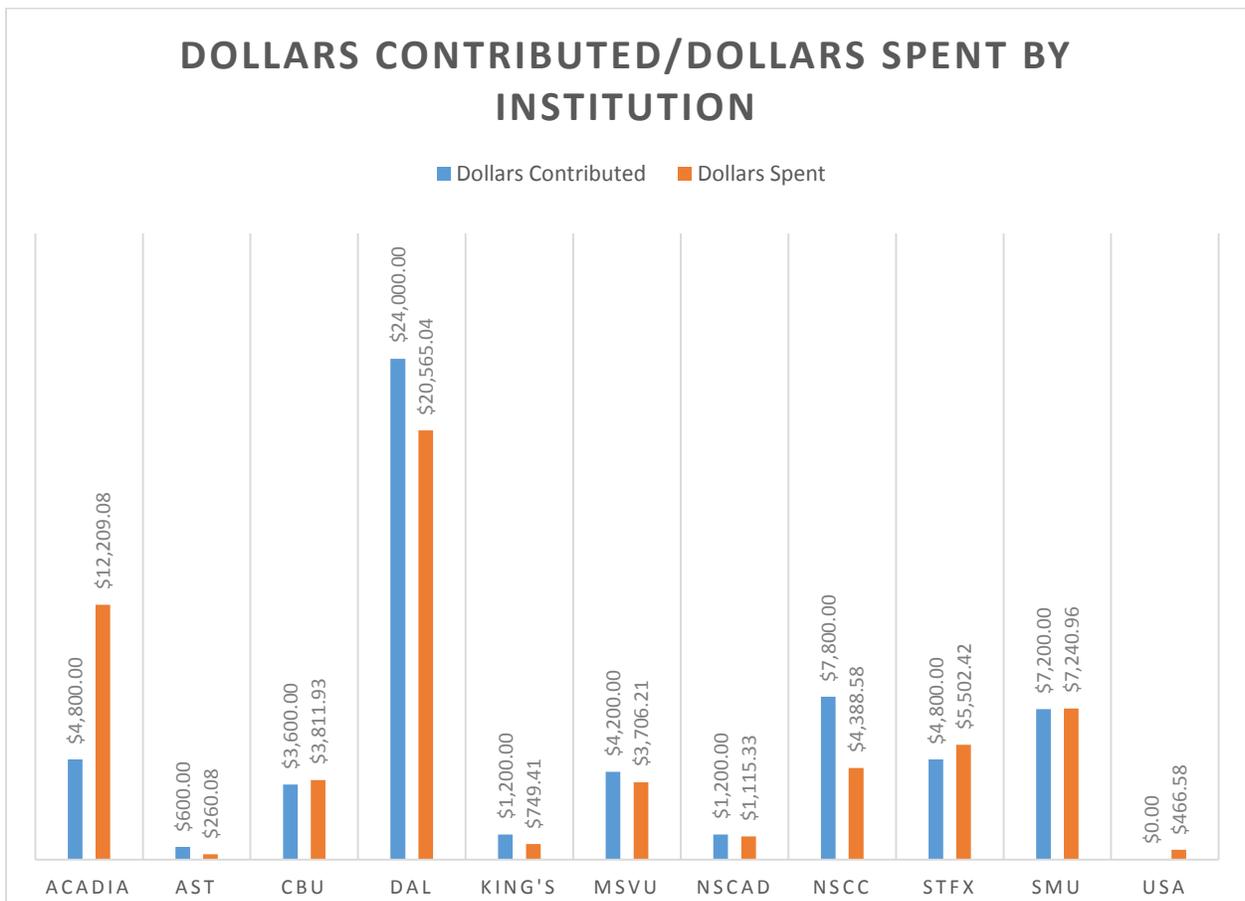
### 3. Data Analysis

#### a. Quick Facts

- 20,870 books
- 3700 unique users
- 4152 fee-based transactions
- 19,724 views/uses
- 2814 titles borrowed
- 47 books purchased

#### b. Costs

- \$60,000 spent
- \$13.50 per STL
- \$250,000 if we bought title on first loan
- \$1.8 million if we bought all titles



#### 4. Full Recommendations

- That a permanent, ongoing Novanet DDA eBook program be instituted.
- That the program be properly funded by Novanet members. Based upon information gathered from the pilot and experience from previous negotiations, the committee recommends that in order to increase the number of titles, particularly front list titles, the amount should be at \$200,000 per year. Suggested options for a funding formula: a percentage of monograph acquisition budgets, continued use of the novanet formula or a new proposal from the directors.
- That the recently constituted Novanet Collections Coordination Group work with the Novanet Manager and office staff to advise the board on Econtent collections.
- That the mandate of the Novanet Collections Coordination Group include:
  - development of policies for collections rationalization
  - development of parameters for the DDA/PDA program
  - creation of the criteria for the profile to define the discovery record collection
  - submit annual report to the Manager and the Board
  - promote and facilitate the use of the shared collection among member communities
  - ensure that any important changes to the collection content and/or access are communicated to member institutions in a timely fashion
- That the Novanet office negotiate with DDA eBook aggregators based on the success of the pilot model including the following:
  - Continue the practice of a high number of STLs (5) before a purchase is triggered.
  - Continue central billing directly to the Novanet office
  - Carefully consider options from publishers/vendors, including the allowing individual libraries to trigger purchases, in order to expand the titles in collection.
  - Resist a price multiplier
  - Investigate the outright purchase of Reserve materials
  - Investigate submitting the IP range for all institutions within the consortium in order to allow walk-ins and to be more in line with other econtent and national model licensing standards.
  - Facilitate ease of downloading to mobile devices
- That titles in individual DDA collections be removed from the OPAC if they are duplicates of consortial DDA titles and careful consideration be given to what individual collections are loaded into the OPAC to reduce the frustration of patrons inability to access materials they find in the consortium's catalogue.

Respectively submitted by the Novanet DDA eBook Pilot Project Group:

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