As I mentioned in my initial post, as part of the Orbis Cascade Alliance, Eastern Washington University has access to both coordinated consortial subscriptions to ejournal packages and databases as well as specific ebook packages facilitated by the Alliance’s Ebook Working Group.

For the consortially managed regular subscriptions – Alliance staff (the program manager for Shared Content, an Eresource Specialist, and a finance person), manage renewals throughout the year – providing pricing, time to ask questions and confirm renewal, and then billing services.   There is a password protected webpage that provides access to license documents, a renewal calendar, and subscription summaries.  From my point of view at a member institution – it’s a very streamlined process and if I do have questions, they have a shared email address I can use to get more information.  They often post new offers and make information on changing existing subscriptions available in a very timely fashion.  Most of these offers are opt-in, so vary in terms of how many members are participating.

For the all-in ebook programs, including usage based and evidence based selection programs – as well as identifying new opportunities:  The Alliance Ebook Working Group (EWG) is made up of volunteers with a variety of specialties – catalogers, acquisitions/collection management, usage statistics, as well as more public service focused, such as subject liaison expertise.  The Alliance Shared Content program manager also helps facilitate and support the group. Last year, when we were considering what new ebook programs to consider bringing online – the EWG polled member institutions with a survey to confirm goals and priorities for ebook programs.  The EWG also evaluated proposals from vendors for new ebook programs to match Alliance goals and needs with vendor opportunities.  Finally, last year a couple of volunteers of the EWG (with help from a broader Shared Content and Technical Services committee) took consortial level and institution level ebook stats received as part of the Wiley Usage Based Collection Management (UBCM) pilot to identify potential selection scenarios.  It took about a month to run scenarios via excel and get feedback from stakeholder groups before title selection decisions were confirmed.  Since we now have an Evidence Based plan in place for Taylor and Francis/CRC content – we anticipate volunteers will also be heavily involved in working with T&F provided usage stats for selection decisions.  The Alliance Program Manager confirms order details, title selections, payment, etc.

The EWG facilitates communication about ebook programs to stakeholders via listservs, Alliance webpages, and individual questions from member institutions – including general ebook program expectations, cataloging-related questions and centrally managed collections in the discovery system, and updates on any technical issues.  The Alliance Shared Content program manager often is the one to communicate with vendors – although member libraries can email the vendor support directly with questions, issues as well.

-Andy

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Benefits to my institution for consortial collection development:

* Access to products we might not get on our own (especially in the case of the all-in ebook program – we probably wouldn’t be able to coordinate multiple programs of the scale the consortia can, for us and others)
* Strength in numbers for securing best terms and cost possible
* Central management of records when possible.  Having ebook collections in the Alma shared Network Zone means the 39 insititutions don’t need to individually download record sets and that new records can be made available more seamlessly to all members as soon as they are received

As the Alliance’s Ebook Working Group has started working with multiple vendors at once we are finding the following:

* Not all vendors seem to understand the concept of shared discovery or why it’s important to us to try and work with OCLC Worldshare, etc like we think they will/should.
* Some vendors seem to think that if ebook titles are available on their platform, that’s enough.  We’re trying to help them understand that it’s critical that our users are finding things through our discovery system (Primo) and we need full and complete records to be there in a timely manner.
* In terms of consortially managed evidence or usage drive selection – ensuring that the vendors can provide usage stats that indicate usage of individual schools (but not receiving 39 individual reports that we need to then consolidate) is critical to make sure we can make informed selection decisions quickly.
* Also realizing that some institutions may already have access to titles through their own previous purchases themselves, and that that individual order usage for such a situation won’t be included in consortial usage stats is critical.  We don’t want to inadvertently select a highly used title that is already owned by the institution with high usage.
* Trying to keep up with platform or ebook program changes has been difficult – especially as the Alliance has introduced multiple vendor programs at once.

Examples:  Taylor and Francis integrated their T&F/CRC platforms just a couple months after our EBS effort started – communicating those changes to stakeholders (including necessary proxy stanza changes) was difficult and unanticipated since the program was very new.  Change from ebrary Academic Complete to Proquest Ebook Central Academic Complete required updates to the communication we share with member institutions as well as collection names in the catalog.  As we’ve increased the number of ebook programs – even though some aspects are streamlined, the uniqueness of each program continues to exist and the members of the EWG have had lots to stay on top of.

-Andy

I definitely want to highlight one of the benefits Andrea mentioned: Working in Alma allows for central management of a lot of our collections, meaning we don’t have to have 23 campuses loading records and updating coverage. This saves us so much time!

Laura --

Laura Krier Systems and Metadata Librarian Sonoma State University Library

**What are best practices of consortial acquisition and licensing that worked well for your institution or the larger consortium?  Any lessons learned you can share?**

From my own experiences:

For the Ebook Working Group of the Orbis Cascade Alliance – now that we’ve been through one full year of usage based collection management with Wiley for ebooks and starting new programs with Oxford University Press/Oxford Scholarship Online and Taylor & Francis, we are starting to realize how critical it is to clearly document in license agreements expectations for:

-shared cataloging/discovery – for example – if we want more than just to download record sets from a vendor – for example, to get records from OCLC Worldshare – understanding the frequency at which that will occur and making sure the vendor has the infrastructure already set up to work with us this way.  Also - double checking that the collection (for example, if using a knowledge base, has the same number of records versus what is anticipated.

-documenting number of titles, or if a certain type of title is excluded (encyclopedias or textbooks for example) – recognizing that for new content, number planned to be published and actually published can shift a bit)

-Usage Statistics: here’s sample language we’re trying:

USAGE STATISTICS

Within X days after termination, or quarterly, as requested, Licensor will deliver to the Licensee Usage Statistics in the form of a list of titles for selection that shall include title, subtitle, ISBN, subject, publication year, title usage by individual institution, and price.  Usage of titles owned by individual institutions through previous purchase will not be included in usage totals. From this list, Licensee will confirm orders for perpetual access to a list of titles that meet in value the amount of the Deposit, no later than XX days after receipt of Usage Statistics.

Do you have any observations on what works well – or what institutions participating in consortial collection development might benefit from thinking about or trying to do differently?

-Andy

I support the Cataloging Department of the University of South Carolina, a member of the aforementioned PASCAL consortium.  At the moment, we have a III INN-Reach union catalog whereby copies of records from individual member institutions’ ILSs are collected and merged into something like a single bibliographic record with each library’s holdings attached.  Where this comes into play for the current question about e-resources: the MARC records that accompany our consortially-subscribed e-book collections are loaded directly into the union catalog.  For about half of PASCAL’s members, they are accustomed to specifically looking in the union catalog for items not locally purchased and for whom the e-book records are fine as they are.  The rest each load the MARC records into their local ILSs (such that they are not recontributed to the union catalog and produce duplicates), which allows the consortial content to display with the local institutional content together and also the possibility of manipulating the MARC records to suit a local purpose.  It is an interesting model for the use of consortial e-resources: manage the MARC records yourself and have them together with “your” content, or rely on the union catalog to manage the MARC records and make sure your users know to check the central catalog for additional e-resources.

Another colleague had previously mentioned on this list that we are in the process of moving to a shared library services platform, which is true.  I for one will be grateful for this single shared system resolving the “either do a lot of work that others are also doing or don’t have the content in your own system” dilemma by having one group of records that everyone can see as if it were local.

Scott

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From the perspective of Eastern Washington University – working with resources from the Orbis Cascade Alliance:

For regular opt-in database and journal subscriptions the Alliance eResource paid staff team manage a website with much of the individual subscription/renewal information on it.  Some of it is posted publically (a renewal calendar, list of resource offers available) – other parts, like the subscription summaries describing the deals, which also can include pricing, details about whether centrally billed/licensed, copies of Alliance-signed license, title lists as applicable and other details are behind a login that representatives of each Alliance member have access.

For the Ebook Working Group (all-in programs with Wiley, Proquest, Taylor & Francis, and OUP) – there are separate webpages, still on the Alliance site that go into more details about the consortial ebook program.  These don’t get into confidential information like pricing or signed license terms so much – so are public.  The volunteer-driven EWG works on making updates to communication pages, but as you might imagine, the work doesn’t happen as quickly as if a group of paid staff were working on it 100% of the time.  On these ebook summary pages, included are title lists, posted usage stats, training materials from the vendors, and summaries of record management issues.  The Records Management summary includes  Alma Network Zone eCollection name, whether a public note exists in Primo and what it says, information about proxy settings and typically a general description about marc record quality and change frequency.  As changes are being discussed and before the information is posted, the EWG uses Google docs/Drive to manage information – but it’s more from a draft-in process point of view so access is limited to those working on it.

-Andy

At EWU, we are not participating in a formal consortium print collection evaluation project, although as an individual institution we are working with OCLC’s Greenglass to analyze our own print collection and have our consortium peer institutions loaded for comparison/overlap.

We we started this over the summer and early fall I shared the following description with EWU librarians (my own description – Greenglass folks might have a better way to describe it   ):

Greenglass from OCLC’s Sustainable Collection Services (SCS) group provides functionality of data modeling and visualization tools to help libraries better understand their print collections by taking institution extracted catalog data [including circ data] for holdings comparison against Worldcat and specifically identified (by EWU) peer institutions (like Orbis Cascade Alliance institutions).  SCS filters and normalizes EWU-provided catalog data to utilize library holdings data with Worldcat, HathiTrust, and Choice information – compiled and presented back to the library via the Greenglass online analysis dashboard.

At this point our subject liaisons are still just in the analysis stage of using Greenglass, but we are asking them to keep in mind consortia goals and guidelines, for instance last copy and duplication thresholds for when it comes time to implement action plans.

-Andy

As part of the Orbis Cascade Alliance ebook program – my experience with consortial title selection through evidence or usage based acquisition programs is limited to just one full year for Wiley UBCM, but it was an interesting experience when it came time to make title selection decisions for 39 distinct and diverse member institutions based on usage of so many members.  We ended up with a 3 pronged approach where we took one pass through consolidated usage statistics selecting the top 7 titles used by each institution – so that every institution would have titles highly used by their users; a second pass selecting titles used by a high number of participating institutions (overall broadly used titles); and the final pass (with the first two selections pulled out) selecting the most highly used titles remaining.  It was a lot of data wrangling, and then a good bit of communication to keep stakeholders informed of the end result.  Hopefully title selection for year 2 goes more quickly now that we have identified that model.  If anyone is interested in more information, I did a presentation at Charleston this past November:  [https://2017charlestonconference.sched.com/event/CHnT/eba-in-practice-facilitating-evidence-driven-e-book-programs-in-both-consortium-and-individual-library-settings](https://urldefense.proofpoint.com/v2/url?u=https-3A__2017charlestonconference.sched.com_event_CHnT_eba-2Din-2Dpractice-2Dfacilitating-2Devidence-2Ddriven-2De-2Dbook-2Dprograms-2Din-2Dboth-2Dconsortium-2Dand-2Dindividual-2Dlibrary-2Dsettings&d=DwMFAg&c=ODFT-G5SujMiGrKuoJJjVg&r=oKfZFqHFAq5wgN2ZWkv-DhxTl7qP9xJmtSdemYlABKM&m=2KyIZzlN-mI6QGGKFkpJJG6WhS5e9LRSt4Cf3P547g0&s=sUdJ73KAMcYjkcMXFqK9w35bMTh9UkXAg41_r4-pmsM&e=)

-Andy