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Anna Craft, Elisabeth Leonard, and Katy Ginanni, "Champagne Wishes, Caviar Dreams: Incorporating E-readers into Leisure Reading While on a Beer Budget" (2011). *Proceedings of the Charleston Library Conference*.
<http://dx.doi.org/10.5703/1288284314948>

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Champagne Wishes, Caviar Dreams: Incorporating E-readers into Leisure Reading While on a Beer Budget

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Abstract:

In the spring of 2010, staff at Western Carolina University's Hunter Library began investigating how to use end of year funds. One of the chosen ideas was to experiment with circulating Kindles loaded with leisure reading titles. The pilot program was initiated as a result of the convergence of the Dean of Library Services' enduring interest in the positive impact reading has on society; the library's need to spend its money wisely, but quickly; and a growing interest in innovation. The Kindle lending program became a successful service, but it was not without its challenges. This article covers the setup required for lending Kindles pre-loaded with electronic titles.

Introduction

At Western Carolina University (WCU), the library's department heads are asked to propose projects if operations money is required. As much as possible, decisions about those proposals are made at the beginning of the fiscal year. However, there is never enough funding for every proposal brought forward. In the spring of 2010, the library's budget manager determined that there was money left unencumbered and notified the Associate Dean of Library Services. The Associate Dean wanted to find strategic ways to expend the funds. After reviewing the budget proposals, it was clear that while there were multiple budget proposals that had not received funding earlier in the year, none of the proposals were for the right amount of money, nor could they be completed in the right time frame. A project addressing the ever-present need for technology was an easy way to spend the funds; but because there was only about \$800 initially to spend, the Associate Dean looked for a project to sponsor that would fit that budget while also making a significant impact on the library and the campus.

Hunter Library already supported a leisure reading collection, which at any given time held between 1,800 and 2,200 books. The collection included a wide range of fiction and nonfiction: literary works, best-sellers, graphic novels, science fiction, romances, cookbooks, how-to books, memoirs, and others. Some of the books were so popular that there were often hold lists for them. The library regularly received requests from patrons of suggested titles for the collection, and tried to purchase these books whenever possible. However, because leisure read-

ing did not directly support the curriculum, and because of potential looming cuts to the collection development budget, it was difficult to justify expanding the collection's modest budget.

In informal conversations, librarians had mentioned a desire to experiment with e-readers. After conversation in a unit heads meeting, a task force was formed to investigate the level of interest within the library. The task force included two staff members from circulation, one staff person from cataloging, the associate dean, the assistant department head of reference, the department head of reference, the web developer, and the metadata librarian, who also served as chair of the Leisure Reading Group.

Once general interest in the library was established, the task force appointed the web developer and one of the circulation staff members who worked with multimedia to assess which e-reader was best suited for Hunter Library. Because the task force was most interested in finding ways to be cost effective (the Amazon Kindle allows up to six copies of an e-book to be shared among six Kindles) and because Amazon was already an approved vendor, the Kindle was selected. In order to select content, the Leisure Reading Group was asked to recommend fiction and nonfiction titles. The committee looked for high use titles in the current collection, titles that frequently had holds, and titles that were on selectors' wish lists. Because additional funds were allocated after the project began, and because not all the recommended titles were available as e-books, there was still funding left after the purchase of the six Kindles, a Kindle DX, and the recommend-

ed titles. The decision was made to add titles from Oprah's book club, from authors who lived or wrote about the local area and the state, literary prize winners, and recent best-sellers.

Acquisitions

The initial order was made by the budget manager in the library administration office. She used a purchasing card (p-card) to purchase nearly 250 books that had been selected by the Associate Dean and the leisure reading selectors. After the initial order, the

process was turned over to a staff member in the acquisitions unit who continues to place new orders.

One problem became apparent immediately during that very first order: It is not possible to add multiple Kindle e-books to an Amazon shopping cart and purchase them all together. Instead one must find an e-book and complete the transaction by purchasing it, and then move on to the next title. As shown below in a screen capture from Amazon, there is no option to add the e-book to a cart:



When the acquisitions assistant places the order in Amazon, she creates a brief record in Innovative's Millennium, Hunter Library's integrated library system, and creates an order there. Then she passes the order to the cataloging department. Catalogers search OCLC's Connexion and download an appropriate record, or create a record if no appropriate record can be found. More detail about that piece of the process follows in the next section.

In an earlier paragraph, it was mentioned that the Kindle was selected because Amazon allows the library to share titles among the devices it has purchased. This means the library can order one copy of a title and can usually share it across up to six Kindles. Some titles have restrictions limiting sharing to fewer than six devices, and unfortunately, that distinction is not clear until one has purchased a title and attempted to download the content to the devices. This restriction appears to be set by the publisher and not by Amazon.

Another hurdle the library continues to encounter is taxes. Because WCU is a state-supported institution, it is exempt from paying taxes. But there is not a way to tell Amazon that at the point of purchase. So, the acquisitions assistant places an order. She knows, at the point of purchase, whether a publisher charges taxes. Some do and some do not. If the order includes taxes, she makes a print-out of the invoice and sends it to the university purchasing office, which then sends a letter with WCU's tax-exempt information to Amazon. It can take a month or more to get the refund from Amazon. Sometimes it comes as a credit on the library's account and sometimes it comes as a refund check.

Cataloging

After the ordering was done and the Kindles had arrived, as with other library resources, these items had to go through several steps before the library could make them available to patrons. The first step was cataloging, which meant that the cataloging

department would need to work with material types that most of the staff members didn't see in a usual day. This included the Kindles themselves, Kindle accessories, such as chargers and power cord adapters; and finally the materials loaded on the Kindles - the e-books. With approximately 250 titles purchased, the e-books provided the bulk of the cataloging work.

The cataloging department wanted to help expedite the process of getting the Kindles out and into the hands of the library's patrons. With a target public roll-out date of the start of the 2010 fall semester, the whole department assisted with the cataloging process. Some worked on the decision-making and process-design side, others on the hands-on cataloging side, and some helped in both areas.

The department first looked at what others had done, reading about other institutions that were lending Kindles and searching in OCLC's Connexion for existing Kindle book records. Technically catalogers are supposed to catalog by the rules - not by example - but in practice it can be tremendously helpful to have example records to look at. A small group made the decisions about cataloging standards, then developed documentation, tested the process, and trained the rest of the staff. Once training was complete, staff members split the items up and worked through the records.

Staff members created brief records for Kindles and their accessories, and full MARC records for the books, using original, copy, and derived records. There was one record for each electronic book, and the records were created to be Kindle-specific in order to make it clear to patrons what they were looking at when they found them in the catalog.

As part of this process, the catalogers needed the actual Kindles in order to look at the resources (the e-books) as they were cataloged. Catalogers loaded the items onto the Kindles, making sure that each Kindle was updated to include all items before the public lending started. This cataloging workflow provided a perk to the unit staff: since catalogers needed the actual devices to do their work, they got to test out the Kindles in advance of the official start of lending. This gave the task force a chance to receive some suggestions and feedback on things to think

about for the instructions and documentation that were created for patrons.

As the book cataloging was completed, one cataloger was in charge of linking the e-book records to the main Kindle records. This way when a Kindle was checked out, all of its associated books would show up as checked out with it.

Lending

In addition to working out the cataloging issues, it was necessary to set up a system for lending the devices. Staff from the cataloging and circulation units worked together to set up new item types and locations in Millennium, as well as loan rules for the new format. The chosen check-out period was three weeks, and the Kindles were set up to circulate to WCU students, faculty, staff, and Friends of the Library. For the Kindle DX, the original plan was to add periodicals to it. However, that plan was never fully realized, and the DX was instead loaded with free titles, assigned a two-day loan period, and checked out to curious patrons who wanted to see what a Kindle could do (without having to wait weeks for one of the regular Kindles!).

In addition to setting up these policies, staff members also created a lending workflow for the circulation staff so they were prepared to check the Kindles out. Part of this involved making it clear that each check-out would involve multiple pieces—the Kindle, its power cord, and a laminated sheet of basic instructions. When Kindles were returned, Circulation staff were asked to plug in the devices so that they would be charged for the next patrons.

The basic instruction sheet that was created to be circulated with the Kindles included information about how to wake the Kindle up after it goes to sleep, find a book, open a book, and change the text size, among other topics. Other documentation included a Frequently Asked Questions (FAQ) sheet about the service so that staff working at public services desks would have something to refer to when they received questions about Kindles. That document discussed topics such as borrowing, renewing loans, battery life, and how to see what books are in the collection. Both documents were created to address basic information, and they did not include more advanced topics,

such as using the Kindle’s wireless capabilities or annotating content within books.

Library staff wanted to make sure that both the Kindles and the e-books were searchable in the catalog, so that patrons would be able to see availability and so they could add themselves to hold lists as desired. Both the books and the accessories were linked to the Kindle records, but accessory records were suppressed from the public catalog. Staff can

see suppressed records in Millennium, but patrons in the public catalog do not see them. When a patron views the bibliographic record for the Kindles, he or she sees one bibliographic record with six item records attached. This allows patrons to check availability of all of the Kindles from one place. Using the request function, patrons can add holds as desired. Below is a screen capture showing a Kindle bibliographic record in the WCU public catalog:

LOCATION	CALL #	STATUS
WCU KINDLE BOOK	KINDLE eREADER 1	DUE 10-06-11 +2 RECALLED
WCU KINDLE BOOK	KINDLE eREADER 2	DUE 10-24-11 +1 HOLD
WCU KINDLE BOOK	KINDLE eREADER 3	DUE 11-02-11 +1 HOLD
WCU KINDLE BOOK	KINDLE eREADER 4	NOT CHK'D OUT
WCU KINDLE BOOK	KINDLE eREADER 5	DUE 10-27-11 +1 HOLD
WCU KINDLE BOOK	KINDLE eREADER 6	DUE 11-03-11 +1 HOLD

NOTE Circulating ebook reader for checkout

Patrons searching for Kindle books can find them in the library’s catalog as well. When a patron views the bibliographic record for an item that is loaded on a Kindle, he or she sees the descriptive information about that particular book, and also sees an item record for each Kindle that holds that book. Since the records are linked, these Kindle listings match what is seen on the Kindle record. This way, whether a patron is searching for a specific item that is on a Kindle

or is searching for a Kindle device, no matter which record they look at, they’ll see the same availability listing and will have the same opportunity to add a hold. So patrons can put in a hold request by finding a book or by finding a Kindle, and either way they’ll be added to the same queue. Below is a screen capture showing a Kindle book bibliographic record in the WCU public catalog:

Author	Godin, Seth	
Title	Linchpin [electronic resource] : are you indispensable? / Seth Godin ; illustrations by Jessica Hagy and Hugh MacLeod	
Edition	Kindle ed	
Publisher	New York : Portfolio, 2010	
	☆☆☆☆☆	
LOCATION	CALL #	STATUS
WCU KINDLE BOOK	KINDLE eREADER 1	DUE 10-06-11 +2 RECALLED
WCU KINDLE BOOK	KINDLE eREADER 2	DUE 10-24-11 +1 HOLD
WCU KINDLE BOOK	KINDLE eREADER 3	DUE 11-02-11 +1 HOLD
WCU KINDLE BOOK	KINDLE eREADER 4	NOT CHK'D OUT
WCU KINDLE BOOK	KINDLE eREADER 5	DUE 10-27-11 +1 HOLD
WCU KINDLE BOOK	KINDLE eREADER 6	DUE 11-03-11 +1 HOLD

Description	x, 244 p. : ill. ; 24 cm	
Bibliography	Includes bibliographical references (p. [238]-244)	
NOTE	ASIN: B00354Y9ZU	
	Kindle eBook	
Summary	The bestselling author of "Tribes" and "The Dip" returns with his most powerful book yet in which he explores why some people make a difference in their fields--and others don't	
Reproduction	Electronic reproduction. Seattle, Wa. : Amazon, 2010. Access may be limited to Kindle users	
System Details	Requires Kindle eBook reader	
Subject	Employee motivation Employees -- Attitudes Creative thinking Value added Work -- Psychological aspects	
Contents	The new world of work -- Thinking about your choice -- Indoctrination: how we got here -- Becoming the linchpin -- Is it possible to do hard work in a cubicle? -- The resistance -- The powerful culture of gifts -- There is no map -- Making the choice -- The culture of connection -- The seven abilities of the linchpin -- When it doesn't work	
Other Author	Amazon.com (Firm)	
OCLC #	635960467	

The library had a number of requests from patrons who wanted to see title lists of what is available on the Kindles, and figuring out the best way to do this presented a small challenge—keeping a spreadsheet or other document was impractical because it would need to be updated whenever changes were made to the collection. So, even though originally a print copy was available at the circulation desk, now when title lists are requested, staff members give instructions to users on how to do a catalog search that will bring up all of the Kindle titles. This way there is no separate document to update, and patrons get a real-time view of what is available by consulting the catalog. This method is not without problems, though—in this search a user has to go through a number of pages in order to see all results, so it isn't the absolute friendliest display.

Assessment

With cataloging and lending workflows in place, the

Kindle lending service was rolled out to patrons in the summer of 2010. The library wanted to gather feedback on this experiment from the start, so members of the task force designed a short survey to hand out each time a Kindle was lent. This survey was designed to ascertain some demographic information about users, to determine what Kindle experience users already had, what problems they had using the Kindles, and also what materials they wanted to see on the Kindles. Patrons provided feedback in all of these areas.

Lingering Issues

Now that the mission of the Kindle Task Force has been accomplished, the group has been sunsetted with thanks. The library's Leisure Reading Group is now responsible for all new titles selected for the Kindles. This group selects in the following categories: graphic novels, horror, romance, science fiction/fantasy, thrillers/mysteries and popular nonfic-

tion. Each Kindle will hold approximately 1,600 titles, and with just over 250 e-books currently loaded on the Kindles, the Leisure Reading Group selectors have been encouraged to buy some e-books with their funds. In some cases, the group has added books as a result of patron requests or suggestions that came on the surveys.

Some of the lingering issues for which we need to find resolutions are:

Cataloging:

Occasionally, the cataloger who works with the Kindles cannot locate appropriate records in OCLC, so some original cataloging continues to be necessary. Another task for which she is responsible is “cleaning up” the Kindles. The cataloger tackles this primarily as a project in the summer. She deletes free books that have been added by patrons, reloads titles that were accidentally deleted, and generally looks for anything that is out of order. When new titles are added by the library during the year, she asks the Circulation department to put all devices on hold; her holds get priority above all others. As the devices are returned to the library, she adds the new title(s) and returns them to Circulation.

Circulation:

Initially, there were long waiting periods for patrons wishing to check out a Kindle. At times the hold list had eight to ten people signed up waiting on each Kindle, and this was frustrating for patrons. While there are still holds and waiting periods for the Kindles, over time the wait has diminished as more and more people have gotten their own e-readers. Another recurring problem is damages to the Kindles themselves, particularly to the screens. The library cannot be sure if this is a problem with the devices, or if users are mishandling them. So far, Amazon has been good about replacing devices that are still under warranty.

Collection Development Policy:

The library has not yet incorporated anything about Kindles into the existing collection development policy. Items that are yet to be determined:

- What to delete, and when to delete it.
- Acceptance policy for gift books. It is now possible for people to give Kindle e-books as gifts. This issue has not come up yet at

Hunter Library, but if it should, the library would follow its existing gift policy.

- Duplication of formats. Initially, the library decided to limit duplication, but this policy may be revisited in the future.
- How to use the Kindle DX. It is still being used for short-term check outs. It was originally intended for use with newspapers and magazines, but subscriptions to those formats were problematic. It is under consideration for delivering visual works, such as graphic novels.
- Device upgrades. As previously mentioned, Amazon has been good about replacing devices as they break, but at some point the library will need to consider upgrading to newer devices. This will depend largely on the library budget.

Conclusion

What began as an experiment at Hunter Library has now evolved into a fully-integrated service. Workflows have been established for maintenance of all parts of the service, and money from the leisure reading budget has been earmarked to purchase additional e-books. Feedback from our users has been positive, so the library plans to continue the service. Until the next big thing in reading technology comes along!