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## Striving for Insights and Contending with Limitations: The Assessment of a Collaborative eBook Project

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# Striving for Insights and Contending with Limitations: the Assessment of a Collaborative eBook Project

by Lorraine “Lorri” Huddy (CTW Librarian for Collaborative Projects, CTW Library Consortium) <lhuddy@wesleyan.edu>

*“You can’t always get what you want...But if you try sometimes you just might find; you get what you need.”* — “You Can’t Always Get What You Want,” lyrics by Mick Jagger and Keith Richards.

The focus on assessment within academic libraries has turned the task of pulling usage reports into the skill of interpreting the data provided. Assessment requires a balancing act between identifying what you want to measure and understanding exactly what you have to work with. The **Rolling Stones** were right: *sometimes* “you get what you need.” This truth resounded during an eBook pilot project assessment for the **CTW Library Consortium**. Although the assessment was not possible, as envisioned, the information made available was well-utilized.

## Collaboration Leads to an eBook Pilot

The **CTW Library Consortium** is comprised of three small liberal arts institutions in Connecticut: **Connecticut College**, New London; **Trinity College**, Hartford; and **Wesleyan University**, Middletown. Established in 1987, in part, to share physical collections through a daily delivery service, the libraries’ collections are currently utilized by 7,100 undergraduate and 300 graduate students.

In 2008, a grant for collaborative collection development (CCD) from **The Andrew W. Mellon Foundation** led to the proposal of a consortial eBook pilot project. As **CTW** began investigating possibilities for sharing eBooks, a desire to be proactive towards eBooks was tempered with caution. Librarians reported requests for print when the eBook was available, adding that some patrons stated a preference for print. While this supported our belief that reading for academic purposes is different from reading for leisure, we considered this could also be due to eBooks whose publishers are forced to redact content when licensing issues arise. In either case, this might require purchasing the same titles in multiple formats. There was also anecdotal evidence that a growing familiarity with leisure eBooks was raising expectations for academic eBooks (i.e., “Which library eBooks can I download to my Kindle?”). This indicated that some users were transitioning from print. But would they readily accept the terms and conditions for using academic eBooks?

While exploring eBook vendors, patron-driven acquisition (PDA) was added to the pilot. Given the **Mellon** grant and PDA’s potential as a CCD tool, the libraries agreed that it made sense to test the viability of this new option. **CTW** selected **MylLibrary, Coutts Information Services’** eBook platform, as its partner, and in January 2010 the CCD eBook pilot began.



## Measuring Success; Assessing the Statistics

The overall assessment goal was to gain insights about users’ online behaviors that might reflect they were steadily transitioning toward eBooks, thus supporting **CTW’s** decision to use PDA for title-by-title eBook purchases. To measure the pilot’s success, the libraries hoped to gather quantitative and qualitative evidence of our users’ growing acceptance of eBooks and PDA as a viable collection development and acquisitions model.

## Evaluating Users’ Acceptance of eBooks vs. Print

We hoped the **MylLibrary** platform would capture information about the use of eBooks that could only be imagined for print titles. These were regularly returned with margin notes, underlined sentences, and sticky notes — would platform tools be used to do this in eBooks, too? Qualitative measures would allow us to virtually “look over their shoulders” through time spent online and platform features usage. Acceptance of eBooks would also be measured using quantitative data (e.g., titles accessed, session and page counts). With these in mind, here are some of **CTW’s** questions about usage of the PDA titles, the data gathered, and the overall success or limitations encountered:

**Usage of titles viewed and purchased:** How extensively are **MylLibrary** eBooks used in terms of sessions and pages viewed? Are titles being used repeatedly?

- **Data Collected:** Titles Purchased; Titles Viewed Once; Sessions and Page Views per Title

- **Success and Limitations:** The **MylLibrary** platform produced various usage reports (including **COUNTER**), but the most helpful for **CTW’s** purposes was Usage Report #1 — “*Find out what patrons are viewing by day, month, and year.*” Details per session included: title, publisher, IP number, login date, session number, and total pages viewed. It was pulled monthly, to check invoices, and then uploaded into a master spreadsheet that tallied usage per title over time. It provided concrete evidence about titles being accessed repeatedly (as per total sessions) and heavily used (as per total pages viewed). Averages and percentages were easily calculated, and data could be manipulated for other statistical measures (e.g., ranges).

**Usage by each library and across CTW:** How many purchased titles are being used by each campus...by the entire consortium? Which campus is using the **MylLibrary** collection most extensively?

- **Data Collected:** Purchased Titles Used on One Campus, Two Campuses, All **CTW** Campuses; Total Titles Used and Sessions per Campus vs. All **CTW** Titles Used and Sessions.

- **Success and Limitations:** Report #1 provided IP numbers per session, which allowed tracking usage by library, thus identifying titles used across the Consortium. A report that pulled and collated title usage by IP range would have been useful, but, instead, the campus per session was manually noted. This data was manipulated to tally and graph individual and consortial use.

Usage of the same titles on two or more campuses has increased to 30 percent over two years. The majority of titles with the highest total usage were recognized as being assigned by faculty. One campus is embracing eBooks more readily and accounts for 67 percent of our **MylLibrary** usage; the other two campuses split the remaining 33 percent almost equally. After discovering this, bill payments changed from an even, three-way split, to a split based on usage patterns.

**Online usage of eBooks/use of eBook platform features:** How long are users staying online in the eBooks? How many **MylLibrary** accounts have been created? Which platform tools are being used? How much printing and downloading are taking place?

- **Data Collected:** Time per Session; Number of **CTW MyLibrary** Accounts; Usage per Platform Feature; Counts for Pages Viewed, Pages Printed, and Pages Downloaded per session.

- **Success or Limitations:** This part of the assessment was the most hindered by a lack of data. Usage Report #1 provides date stamps but not start/end times or total time per session. It reports “Pages Viewed” per session, which collates all pages viewed, printed, and downloaded. **MylLibrary** could not supply a more detailed report or data on platform feature usage.

In an effort to gather qualitative information about user behaviors, **CTW** interviewed undergraduates on each campus about their use of eBooks. This proved helpful, but to substantiate the information gathered, objective data from an eBook platform would be needed.

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## Evaluating PDA as a Viable Collection Development and Acquisitions Model

Ascertaining PDA's sustainability potential in the libraries meant examining how well the PDA profile had performed in terms of providing titles that fit CTW's collection development needs. A financial assessment was needed to determine overall costs and savings while considering desired outcomes for collection development.

**PDA profile assessment:** Do MyiLibrary titles fall within CTW's profile parameters? Do purchases fit within CTW's overall collection development goals? How many purchases are used by two or more campuses?

- **Data Collected:** MyiLibrary titles were reviewed; if questioned, OASIS (Coutts' title knowledge base) provided how it matched CTW's PDA profile. Prices were checked to assure they did not exceed CTW's cost parameter. For use across the consortium, IP numbers were monitored (see "Usage by each library and across CTW").

- **Success and Limitations:** Profile matches had to be checked title-by-title, so this occurred only if a title seemed out of scope. Then parameters were tweaked to resolve profile issues. Overall, the shared profile has been a success: most titles fit within the scope of CTW's print collections. The only recurring issue is from price increases after eBooks are added to the PDA program. Coutts has taken steps to monitor eBook prices more closely, send notifications, and offer the option to purchase or deactivate the title in question.

**Unique titles vs. overlap with CTW holdings:** Are MyiLibrary eBooks providing access to new content? How many MyiLibrary purchased titles are unique to CTW holdings?

- **Data Collected:** CTW holdings were checked manually to determine how many MyiLibrary purchases were unique to the consortial collection.

- **Success and Limitations:** To increase the likelihood of purchasing unique MyiLibrary content, Coutts' de-duplication service removed any titles held in duplicate or triplicate across CTW; however, this customization could not be automated, so CTW agreed that only eBook holdings would be de-duplicated. Since this increased the possibility of purchasing the same title in eBook and print, gathering data on unique MyiLibrary titles ended after de-duplication changes were implemented.

**Usage by subject area:** Are certain LC subject areas getting more activity than other areas?

- **Data Collected:** Titles Viewed and Sessions by LC Subject Area (compared to all active MyiLibrary titles)

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# against the grain people profile

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## Lorri Huddy

**BORN AND RAISED:** Born in upstate NY — lived in the Rochester area until 1996. My husband's career meant moving to NJ (where he's from) and then to CT.

**PROFESSIONAL CAREER AND ACTIVITIES:** MLS from Rutgers University — initially planned to become a Children's or Young Adult Librarian, but switched to the School Media Specialist and Reference tracts. I worked in a few public libraries (Children's, Young Adult, and Adult reference) and as Head Librarian at a private high school. Academic librarianship happened somewhat by chance after moving to CT — I was hired part-time for reference work at the Trinity College Library and really enjoyed working with the students. Trinity hired me as a Reference & Instruction librarian, and I also took on responsibilities as E-Resources Coordinator. The transition from print to online was creating a new form of librarianship which I found to be simultaneously exciting and challenging. I left Trinity after five years, to work on behalf of all types of libraries for the CT State Library, as the eResources Coordinator for iCONN, the CT Digital Library. I stayed only a few years because I missed the reference/research aspects of being a librarian. The CTW Library Consortium hired me in 2007 to coordinate their collaborative collection development grant activities. Due to new consortial projects, I'm still there and know how fortunate I am. The three libraries are filled with talented and hard-working people — working with them is just one of the benefits of my job.

**FAMILY:** Married to Bob Huddy and we have with three grown children: Jessica, a graphic designer, and Justin and Evan, both mechanical engineers like their dad. (Is there an engineering gene? It runs in our families — both grandfathers are engineers too!)

**PETS:** Our empty nest is re-feathered with 3 four-legged companions: Zoltan, a Manx cat; Drea, a Maine Coon cat; and Ruby, a Brittany/Vizsla mix.

**IN MY SPARE TIME I LIKE TO:** I love to travel, but, currently, most trips involve visiting out-of-state relatives. I also like gardening, yoga, hiking, kayaking, and cross-country skiing — none of which I do enough of! Favorite past-times are watching foreign and independent movies, preferably at Trinity's Cinestudio (a wonderful old-time movie theater complete with a crimson velvet curtain!) and listening to podcasts of NPR radio shows.

**FAVORITE BOOKS:** *One Hundred Years of Solitude* by Gabriel Garcia Marquez, *The Brothers K* by David James Duncan, *Middlesex* by Jeffrey Eugenides, *The Prince of Tides* by Pat Conroy, absolutely everything by Wally Lamb. Currently reading: Bill Bryson's *At Home* and A.S. Byatt's *The Children's Book*.

**PET PEEVES/WHAT MAKES ME MAD:** I have two automobile-related pet peeves: drivers who don't use their car blinkers or who are on cellphones or texting while driving.

**PHILOSOPHY:** Help change things for the better (and if you can't help, don't make things difficult for those who are trying.)

**MOST MEMORABLE CAREER ACHIEVEMENT:** Getting my MLS while my children were young and managing to balance the demands of school, family, and work.

**HOW/WHERE DO I SEE THE INDUSTRY IN FIVE YEARS:** We'll be in the midst of an economic recovery, but academic library budgets will be slow to recover. Administrations may not re-fund these to pre-downturn levels until endowments are more than fully replenished. So libraries will still be forced to make difficult decisions regarding the resources they can afford to provide. There will be a need for vendors to think creatively; to offer more pay-per-view and alternative access options for all types of online resources (not just eBooks). The academic eBook market will continue to grow — along with users' expectations. The user experience will play a significant role in determining how high and continuous this level of growth will be. 🌱



- **Success and Limitations:** Monitoring usage across LC subjects would allow collection development efforts to increase eBook offerings in areas with the most activity. This proved more of a challenge than anticipated because, instead of LC call numbers, descriptive LC classes are assigned to **MyiLibrary** titles. Many were incorrect, while others were too generic (e.g., “1961-2000”). **OASIS** was utilized for LC call numbers, which were copied into **CTW**’s master usage spreadsheet. The most time-consuming task resulted from a changing PDA collection. As a result, comparing titles viewed to all active titles was done infrequently. When it was analyzed, we were pleased to discover that eBooks within all subject areas were being used, and, usually, in proportion to all titles available in each area.

**A cost analysis of eBooks:** eBook pricing practices were of great interest, due to budgets, and because all three libraries prefer softcover for print purchases. **CTW** had agreed that **MyiLibrary** titles would be purchased after two views. There were concerns about this since it did not account for accidental usage (one-page views); **MyiLibrary** did not offer Short Term Loans (STLs) to offset such usage; and a year into our pilot, we learned other **MyiLibrary** customers had a three-view agreement. Yet, savings were expected from splitting **MyiLibrary** invoices and because fees were not charged when titles were viewed only once. **CTW**’s cost analysis would take into account the extent to which titles were used after purchase and the financial benefits of eBooks that were used once but not purchased.

**Comparing eBook prices to print:** How many **MyiLibrary** purchases were available in softcover? How do **MyiLibrary** eBook prices compare to hardcover and softcover prices? Which publishers price their eBooks “too high” compared to print versions?

- **Data Collected:** **OASIS** provided all the prices needed. In addition to monitoring title-by-title eBook vs. print prices, average prices across formats were calculated, as well as an Average Cost Per Use for purchased titles.
- **Success and Limitations:** Prices were added to the master usage spreadsheet, which allowed us to monitor individual and total costs over time and calculate average prices and cost per use.

A desired outcome of the pilot was to acquire content in a cost-efficient manner. The Consortium was unaccustomed to purchasing eBooks on a title-by-title basis, so prices were gathered to learn how eBook prices compared to print. The intention was to control title costs by embargoing publishers whose eBook prices seemed “too high” given a title’s availability in print (**CTW** defined “too high” as eBook prices based on hardcover when softcover was available, or if eBooks were priced three times higher than softcover). Although **CTW** purchased titles that were perceived as “too high,” this was mitigated by two facts: the titles were used by patrons, and the costs were shared across the Consortium.

**Assessing the value of one-time views:** If **CTW** had to purchase all titles viewed once, what would it cost? What was the value of these titles compared to the cost of purchased titles?

- **Data Collected:** Prices of Titles Viewed Only Once (not purchased)
- **Success and Limitations:** **OASIS** provided prices of titles viewed once, which were easily tallied and tracked over time in the master usage spreadsheet. The overall value of one-time views is a source of satisfaction, as it consistently equals the cost of purchased titles.

**Assessing the cost of the two-view purchase trigger:** How many titles have not been used since purchase? How frequently were purchases triggered “accidentally” (as indicated by minimal pages viewed during the first two sessions)?

- **Data Collected:** Titles Not Used Since Purchase, Titles Purchased Due to One-Page Views
- **Success and Limitations:** Usage since purchase was easily tracked in the master spreadsheet. Titles used after purchase had three or more sessions; titles not used since being purchased had only two sessions.
- Using two years of data, **CTW** learned that 34 percent of its **MyiLibrary** titles were not used after purchase. This led us to look at purchases triggered by usage that could be accidental (i.e., one-page views). Of purchases due to one-page views, 4.5 percent were triggered completely (both sessions), while 27 percent were triggered partially. We determined this by manually reviewing pages per session for each new purchase — time-consuming, but worth it, when we learned that, of the titles triggered from one-page views, 66 percent had

subsequent usage. Knowing this — that two-thirds of these purchases were merely delayed — could persuade **MyiLibrary** to change **CTW**’s terms to three views before purchase.

These insights were used in conjunction with information learned at conference presentations on eBooks: other **MyiLibrary** customers had a three-view purchase trigger. **CTW** attempted to negotiate for this, but discussions failed to reach mutually agreeable terms. Given the relationship that had developed with our PDA partner, this was an unanticipated setback but did not end **CTW**’s program with **MyiLibrary**. Due to our satisfaction with titles purchased and **MyiLibrary**’s access model, it will stay in place while other programs are implemented.

### Closing Remarks

The constantly-changing eBook market indicated a need to thoroughly re-evaluate the Consortium’s options. Based on information gathered during the **MyiLibrary** assessment and a need to consolidate selection and acquisition workflows, **CTW** looked at other PDA possibilities and is implementing a new eBook pilot with **YBP Library Services (YBP)** and **Ebook Library (EBL)**. One of its appealing features is the libraries have the ability to avoid accidental usage that may trigger purchases. Users may browse for a short period of time without this counting toward the title’s purchase. If they stay in the eBook long enough, a STL will provide longer access to the title. Selectors will choose titles to be added to this PDA program using our **YBP** collection development profiles, and **GObi (Global Online Bibliographic Information)**, **YBP**’s online acquisition and collection development tool, will provide title notifications and pricing across all available versions.

Assessing the **MyiLibrary** eBook PDA pilot proved challenging because, as is often the case, it was time-consuming to collate useful pieces of information into a more complete picture for assessment purposes. From the start, it was known that gaining insights into users’ online behaviors would be difficult. **MyiLibrary** reports may lack data on platform feature use, but given our experiences with other e-resource statistics, this was not entirely unexpected; however, as platforms are created and modified, information-gathering mechanisms, similar to **Google Analytics**, should be considered. The data gathered would provide insights into users’ behaviors that would benefit publishers, vendors, and libraries.

With respect to the viability of PDA as a collection development model, redacted content from eBooks is problematic. The transition to eBooks is still underway; proper disclosure is needed for eBooks to become a trustworthy substitute for print. Libraries have a legitimate need to know which titles are affected, as an assurance that eBooks purchased via PDA (and ordered title-by-title) are equivalent to their print counterparts. A solution is the provision of such information from publishers to vendors and, ultimately, to their primary customers: libraries. 🐼

**University of Virginia**, way back before he went to library school. **Anne** didn’t put that in the online profile so it’s a **print ATG exclusive**. Small world!

<http://www.against-the-grain.com/2012/08/atg-star-of-the-week-anne-myers-librarian-for-acquisitions-continuing-resources-yale-law-library/>

Speaking of **Anne**, she registered for the **Charleston Conference** back in June (have

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