

MA eBook Project Evaluation

Presented for review by the Statewide Resource Sharing Committee - June 12, 2014

Background

In September 2012, the Statewide Resource Sharing Committee (SRSC) created a business plan that outlined a vision and principles for a statewide eBook program and recommended a pilot project to explore solutions and develop recommendations for statewide implementation. This report outlines the pilot project and provides an evaluation of the project and recommendations for expansion to all libraries in the Commonwealth.

Pilot Libraries

SRSC identified five “alpha” libraries who each selected nine additional libraries for the pilot program. There were also a few changes midstream. In the end, 49 libraries of all types throughout Massachusetts participated in the pilot project.

Network	Academic	Public	School	Special	Total
C/W MARS	4	11		1	16
CLAMS	1				1
MassCat			3		3
MLN	1	6			7
MVLC		3			3
NOBLE	2	2	1		5
OCLN	1	5			6
SAILS		1			1
Not networked	1		4	2	7
Grand Total	10	28	8	3	49

eBook Products

Three vendors were selected from an RFP process to provide content and functionality for this pilot project. As of May, there are 164,351 eBooks and other digital items available for download/circulation.

Vendor	Product	Lending Model(s) and Features	Items Available
Baker & Taylor	Axis360	<ul style="list-style-type: none"> One-book-one-user 	3,039
BiblioLabs	BiblioBoard Library	<ul style="list-style-type: none"> Unlimited simultaneous use - leased and owned content* 	25,796

		<ul style="list-style-type: none"> • Creator module 	
Proquest	EBook Library (EBL)	<ul style="list-style-type: none"> • Short-term loans and horizontal lending of owned content* 	135,516

* No content was purchased from BiblioLabs or Proquest as part of the pilot program.

All content from the three products was added to the MA eBook Project catalog (<http://ebooks.masslibsystem.org/>) maintained by MLS and hosted by Bywater Solutions. In total, 162,823 records for eBooks and other eContent are currently available in the system for pilot library users.

Timeline

05.2012	Resource Sharing Unbound - MLS Spring Conference
10.2012	Business plan developed by SRSC
01.2013	MLS chosen to administer project; Deb Hoadley designated project leader
03-04.2013	RFP for eBook vendors issued
05-10.2013	Contracts negotiated
07.2013	Task forces established: <ul style="list-style-type: none"> • Collection development • PR, promotion and training • Sustainability and funding
09.2013	Product training began (Ongoing)
11.2013	Pilot launched; launch party
12.2013	LSTA grant submitted
04.2014	MBLC legislative agenda unveiled - End the Digital Lockout
06.2014	Pilot ends
07.2014	Tentative launch of eContent program

Evaluation

SRSC developed three broad evaluation criteria for the pilot project shown below.

	Not	Somewhat	Achieved
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	Achieved	Achieved	
1. Library patrons have access to a user-friendly eBook borrowing platform.		X	
2. Library patrons have access to a broad collection of eBook titles. Patrons of the 50 pilot libraries have access to an opening day collection of 10,000 titles.			X
3. Staffs of participating libraries are informed about the eBook project and can assist their patrons to use it. Staff has access to training to introduce the eBook project. Staff is supported by promotional material to help launch the project.			X

1. MLS and the pilot libraries have engaged actively with the three vendors in the pilot program to identify enhancements and to address challenges with each platform. In general, the vendors have been very receptive to those efforts and have made many changes to incorporate our feedback. There are, however, challenges that remain such as a more seamless authentication process, and it is our hope to work with our vendor partners on ongoing improvements. There are surveys in progress to gather feedback from library staff and users.

2. Pilot libraries have access to more than 150,000 titles in the collection.

3. The PR, Promotion and Training Task Force developed a launch kit, promotional materials and documentation for the products in the pilot project. Vendors, task force members and other pilot library staff members offered numerous training opportunities for interested pilot library staff members.

Usage Statistics

Below are the download/circulation statistics from the three products in the pilot project. These statistics reflect varying launch times and intensive training times throughout the pilot project, so it is premature to extract meaning. However, it does appear that use is on the rise for all products, and we now have baseline data that can be used to monitor progress in the longer term.

	11/2014	12/2014	01/2014	02/2014	03/2014	04/2014	05/2014
Axis360	30	183	446	364	367	388	406
BiblioBoard Library	455	917	1494	1010	820	826	974
EBL						51	150
Total	485	1100	1940	1374	1187	1265	1530

Successes

1. One of the greatest successes of this project was the engagement of the pilot libraries with the project and with one another. This project was a great example of multi-type library collaboration. In addition, the three task forces were very productive during the pilot program, laying the groundwork for the future. In short, this was a participant-driven project.
2. Another great success is our engagement with our vendor partners. In particular, Baker & Taylor and BiblioLabs have been very responsive to suggestions, very active in our training efforts and also very active in their efforts with publishers on our behalf.
3. Advocacy has been another important component of the project. The pilot libraries were engaged with the legislative agenda, and Baker & Taylor successfully expanded access to publishers that were previously unable to libraries in consortia. In addition, MLS expanded its collaboration with other major U.S. consortia including a shared booth at Book Expo America to promote cooperation between libraries and publishers.

Lessons Learned

1. Contract negotiations and other critical items took longer than expected, pushing back the time frame considerably. Some pilot libraries were fatigued by the drawn out project, and scheduling became challenging as the launch of the pilot project faced the different calendars in play, such as the school year and the academic calendar.
2. Because it is a pilot project, there were often just a few staff members at each library that were engaged. This likely slowed implementation and use of the products. However, this is to be expected in a pilot project.
3. The process of pilot library selection focused on library type, but didn't factor in the networks and geographies of the state. This has led to some misunderstandings and perceived inequity.
4. Authentication is currently not optimal, and we continue to work with the vendors on a scalable approach. (Note, however, that the networks have been very cooperative in handling authentication needs for their pilot libraries.)

Financial Report

This project was funded jointly by MLS and MBLC via an LSTA grant.

	LSTA Funds	MLS Funds
Baker & Taylor	\$ 119,829.18	\$ -
BiblioLabs	5,000.00	\$125,065.00
Proquest	1,034.85	-
Other	778.32	25.00
Total	\$126,642.35	\$ 125,090.00

Sustainability and Funding Recommendations

Governance

We recommend that this project continue as an ongoing statewide program with the Massachusetts Library System and the Massachusetts Board of Library Commissioners providing funding for infrastructure, support, and, if possible, for content. A memorandum of understanding outlining the roles and responsibilities of all stakeholders will provide a roadmap to success. We further recommend the establishment of a steering committee, referred to herein as the eContent Program Steering Committee, comprised of participating libraries that shall govern the program in concert with the Resource Sharing Team at MLS.

Vendors

We recommend that the project launch with the three vendors used in the pilot project as outlined below. Additional vendors may be added driven by participant demand and as funding allows.

Baker & Taylor: Axis 360

In anticipation of the launch of this project, MLS has negotiated the following terms that outline progressive pricing as participation in the eContent Program expands.

	Up to 350 Libraries	351 to 700 Libraries	701 to 1050 Libraries	1051 or More Libraries
Annual Platform Fee	\$50,000	\$95,000	\$135,000	\$160,000
Monthly Content Commitment	\$75,000	\$100,000	\$150,000	\$200,000

Baker & Taylor content is available via the one-book-one-user model, and they have committed to work with us on content portability should we decide to move content we have purchased to another platform, within the rights of the publishers.

BiblioLabs: BiblioBoard Library and Creator

In anticipation of the launch of this project, MLS has negotiated the following terms that outline progressive pricing as participation in the eContent Program expands.

	Up to 350 Libraries	351 to 700 Libraries	701 to 1050 Libraries	1051 or More Libraries
Annual Platform Fee	\$180,000	\$180,000	\$180,000	\$180,000
Monthly Content Commitment	\$50,000	\$100,000	\$150,000	\$200,000

Monthly Creator Fee	\$20,000	\$40,000	\$60,000	\$80,000
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BiblioBoard content is available via the unlimited simultaneous use model and can be available via geolocation.

Proquest: EBook Library (EBL)

There are no platform fees or content minimums associated with this contract. Content is available to purchase and via short-term loan. Purchased content is available via EBL's horizontal lending program that sets a number of lends per title each year and allows for simultaneous use. Short-term loan content is available as pay-per-use. The eContent Program Steering Committee can designate which content is available via short-term loan, gaining control over potential costs.

Public Relations

The pilot project PR Task Force was actively engaged with MBLC's PR committee. This is an integral part of the success of a statewide project building a strong presence and unified look. It is recommended that this close relationship continue.

Funding Model

The following funding model provides a sustainable beginning for the project. The steering committee will evaluate adjustment needs in subsequent years.

Bucket	Type	Description	Contribution	Count	Total Contribution
A	Academic	\$50,000 or less	\$500	18	\$9,000
B	Academic	\$50,001 to \$100,000	\$750	20	\$15,000
C	Academic	\$100,001 to \$250,000	\$1,000	27	\$27,000
D	Academic	\$250,001 to \$500,000	\$2,500	15	\$37,500
E	Academic	\$500,001 to \$1,000,000	\$5,000	9	\$45,000
F	Academic	\$1,000,001 to \$2,000,000	\$10,000	11	\$110,000
G	Academic	\$2,000,001 or greater	\$15,000	12	\$180,000
	Academic			112	\$423,500
H	Public	5,000 or fewer POP	\$250	124	\$28,061
I	Public	5,001 to 10,000 POP	\$500	68	\$29,897

J	Public	10,001 to 25,000 POP	\$2,500	108	\$237,426
K	Public	25,001 to 50,000 POP	\$5,000	46	\$193,127
L	Public	50,001 to 100,000 POP	\$7,500	20	\$106,003
M	Public	100,001 to 250,000 POP	\$15,000	4	\$33,618
N	Public	250,001 or greater POP	\$40,000	1	\$40,000
	Public			371	\$668,133
O	School	500 or fewer FTE	\$100	437	\$38,655
P	School	501 to 1,000 FTE	\$300	360	\$92,450
Q	School	1,001 to 1,500 FTE	\$500	104	\$42,430
R	School	1,501 to 2,000 FTE	\$700	27	\$16,344
S	School	2,001 to 2,500 FTE	\$900	13	\$7,822
T	School	2,501 or greater FTE	\$1,000	4	\$2,165
	School			945	\$199,867
	Total			1428	\$1,291,500

The contribution for academic libraries is based on materials budget as taken from IPEDS data. The contributions for public libraries are based on population served reported to MBLC and are graduated by EQV per capita provided by the Department of Revenue for those municipalities that fall below the median. The contributions for school libraries are based on student FTE reported to the Department of Elementary and Secondary Education and are also graduated by EQV per capita for those municipalities that fall below the median. Special libraries are not included in this fee structure as their purposes and collection needs vary greatly. We anticipate approaching them by sub-type and group (e.g. MAHSLIN) on major collection purchases to gain entry to the program.

Incentives for participation include the following:

- Year 1 entry - low pricing
- MLS and MBLC cover all platform fees
- Discount to groups
- Year 1 - priority setting and policy development

The Year 1 **group discount** would be as follows:

- **Up to a 25% discount for large groups with a minimum of 10 participating members**

If not every member of the group participates, the discount will be adjusted proportionally by the percentage of members joining.

FY 2015 Priorities

There are a number of important efforts that we expect to begin or continue in FY 2015 in order to ensure a successful program.

5. **Continued strong participant engagement**

The Steering Committee will evaluate and make recommendations for the future success of the statewide program. Nora Blake, MLS MassCat Manager, will join the Resource Sharing Team and work with participant libraries on support and training. MLS Technical Advisors and support staff will work to develop an efficient support and system to allow the widest possible participation by libraries and patrons.

6. **Continued strong vendor engagement**

Stephen Spohn at MLS will work with vendor partners on ongoing technical improvements and publisher relations.

7. **Establishment of steering committee and content selection processes**

The Collection Development Task Force has laid a strong foundation for content selection.

8. **Continued collaboration with MBLC to define roles and promote to libraries and patrons**

The PR, Promotion & Training Task Force, in collaboration with Celeste Bruno at MBLC, has established priorities with MBLC and Buyer Advertising to continue working on a strong message and materials for library staff and end-users.

9. **Continued dialog with Library for the Commonwealth**

10. **Stronger engagement with our network partners**

We hope to engage them in conversations with vendors to help develop smarter authentication frameworks, workflows for metadata and related support issues.

11. **Continued exploration of eBook discovery solutions**

MLS is active on the Statewide Discovery Task Force and is also actively exploring emerging eBook platform and discovery solutions in the marketplace.

Appendix A. Pilot Libraries

49 libraries of all types throughout Massachusetts participated in the pilot project.

Library	Contact	Type	Network
Cape Cod Community College	Jeanmarie Fraser	AC	CLAMS
Eastern Nazarene College-Wollaston	Susan Watkins	AC	OCLN
Elms College	Tony Fonseca	AC	C/W MARS
Framingham State	Bonnie Mitchell	AC	MLN
Greenfield CC	Eric Poulin	AC	C/W MARS
Middlesex Community College	MaryAnn Niles	AC	NOBLE
Mount Wachusett CC	Heidi McCann	AC	C/W MARS
Quinsigamond CC	Andrea MacRitchie	AC	C/W MARS
Salem State	Nancy George	AC	NOBLE
WPI-Worcester	Don Richardson	AC	
Ames Free-Easton	Uma Hiremath	PU	SAILS
Arlington	Ryan Livergood	PU	MLN
Bellingham	Bernadette Rivard	PU	C/W MARS
Beverly	Pat Cirone	PU	NOBLE
Brockton	Betsy Marcus	PU	OCLN
Cambridge	Susan Flannery	PU	MLN
Canton	Mark Lague	PU	OCLN
Chelmsford	Brian Herzog	PU	MVLC
Colrain	Betty Johnson	PU	C/W MARS
Emily Williston-Easthampton	Kristi Chadwick	PU	C/W MARS
Forbes-Northampton	Molly Moss	PU	C/W MARS
Hingham	Dennis Corcoran	PU	OCLN
Hudson	Deborah Kane	PU	C/W MARS

Lee	Dan Paquette	PU	C/W MARS
Leominster	Susan Shelton	PU	C/W MARS
Lexington	Koren Stembridge	PU	MLN
Milford	Susan Edmonds	PU	C/W MARS
Natick	Jane Finlay	PU	MLN
Nevins Library-Methuen	Kirsten Underwood	PU	MVLC
Norwell Public	Rebecca Freer	PU	OCLN
Paul Pratt-Cohasset	Jackie Rafferty	PU	OCLN
Pepperell	Debra Spratt	PU	C/W MARS
Shrewsbury	Ellen Dolan	PU	C/W MARS
Springfield	Ann Keefe	PU	C/W MARS
Sudbury	Esme Green	PU	MLN
Tewksbury	Cindy Grove	PU	MVLC
Wakefield	Jeff Klapes	PU	NOBLE
Wellesley	Sue Hamilos	PU	MLN
Amherst HS	Leslie Lomasson	SC	
Avon M/H School	Tricia London	SC	MassCat
Beverly School District	Barbara Fecteau	SC	MassCat
Cambridge Rindge & Latin	Holly Samuels	SC	
Fay School-Southborough	Sharon Lux	SC	
Mount Greylock HS-Williamstown	Kathy Share	SC	MassCat
Oliver Ames HS-Easton	Joan Holt	SC	
Phillips - Andover	Elisabeth Tully	SC	NOBLE
Barnstable Trial Court Law Library	Meg Hill	SP	
Mitre Corporation	Richard Poisson	SP	
State Library of Massachusetts	Alix Quan	SP	C/W/MARS