

Massachusetts Statewide eBook Project & Collaborative Collection Development

IDS Project Conference
Syracuse August 2013

Massachusetts Library System-MLS

Massachusetts Library System (MLS)

Marlborough & Whately, Massachusetts

508-357-2121

Deb Hoadley, eBook Team Leader

dhoadley@masslibsystem.org

Greg Pronevitz, Executive Director

greg@masslibsystem.org

MLS Background

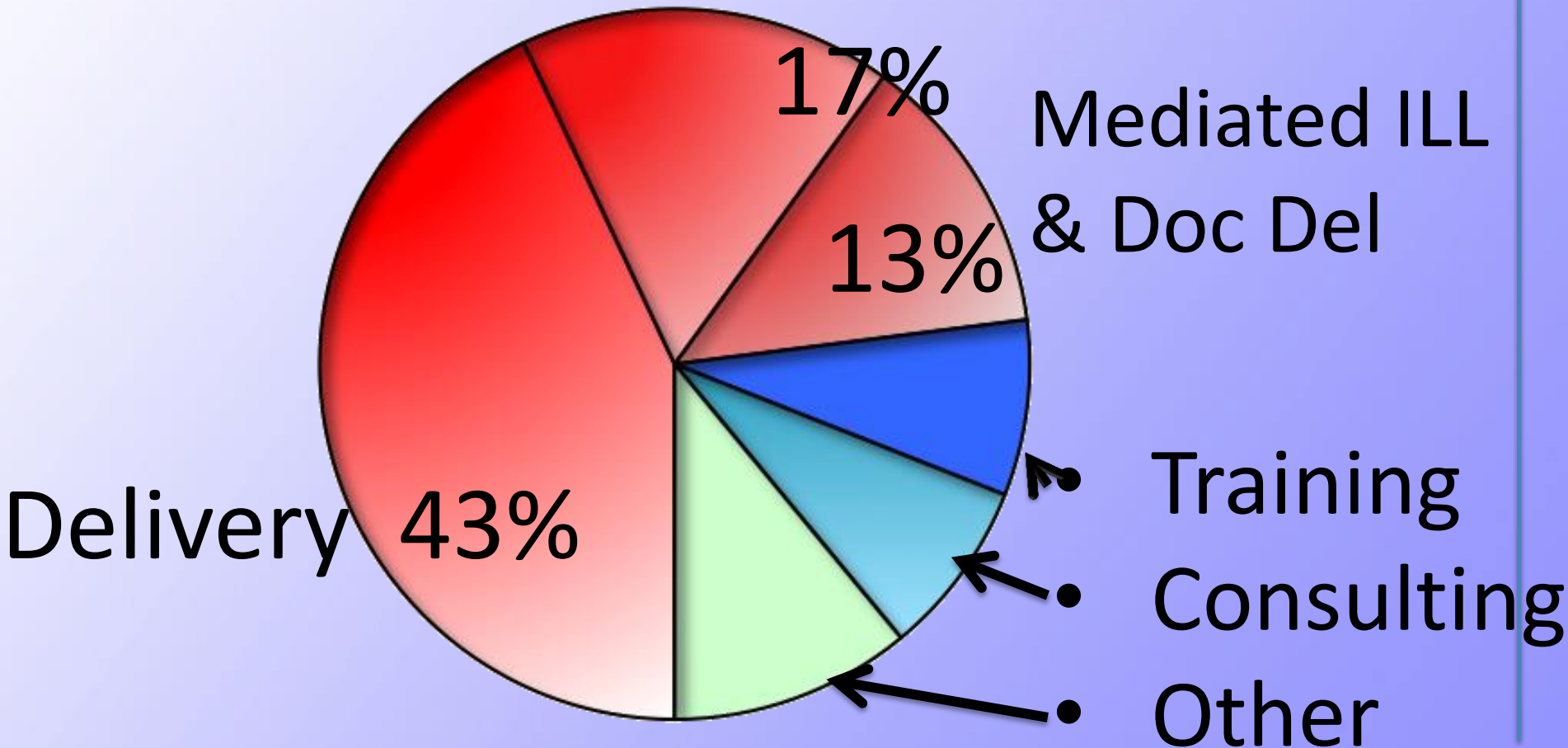
- 1997 – Three state-funded public library regions become six multitype regions—*Much like NY 3Rs consortia but without the ILS.*
- 2010 – Six regions become the MLS with over 1,600 members
Budget cut by one-third
 - Staffing cut in half
 - Locations cut from six to two
 - Most services are continued (some at lower level)

MLS Roles

- State funded but not a state agency
- Building a community of Mass. Libraries
- Agile, responsive, innovative services
- Empower libraries
 - Training & Professional Development
 - Advisory Services
- Champions of Resource Sharing

Resource Sharing “Я” Us

Online Content



Resource Sharing in Massachusetts

- *Excludes library to library sharing via OCLC*
- 10 Shared Automated Networks
 - 600 libraries; 58mil circs/yr; 7mil loans/yr
- Virtual Catalog - 80,000 loans/yr
- MLS Services
- Physical Delivery - ~14,000,000 items/yr
- Mediated ILL - ~30,000 loans/yr
- Journal Article Document Delivery - ~5,000/yr
- Statewide Online Content – 13+million retrievals/yr

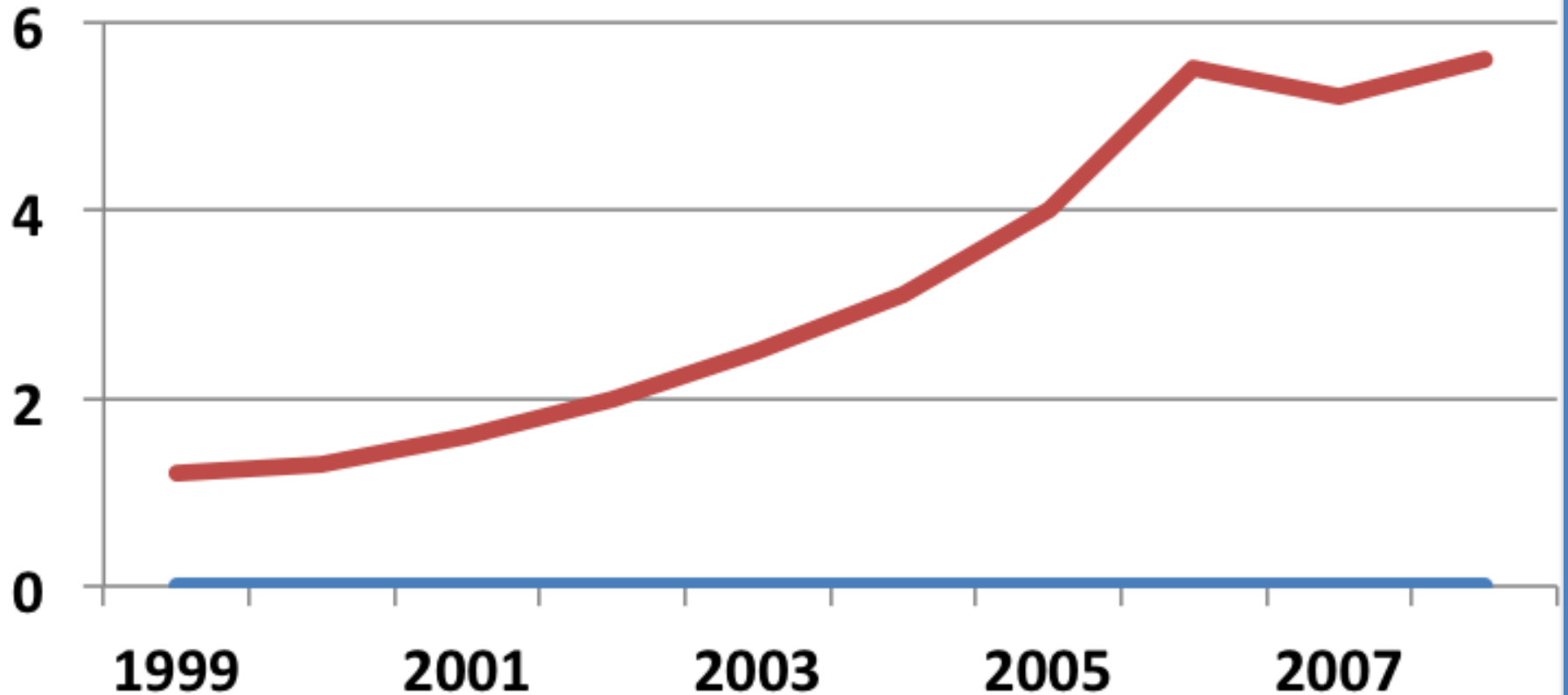
The Risk to Resource Sharing

- Flattening of circulation and ILL for physical items after years of double-digit growth
- Growth of e-collections and use of electronic resources
- Many Content Silos without allowance for ILL and statewide use

Massachusetts

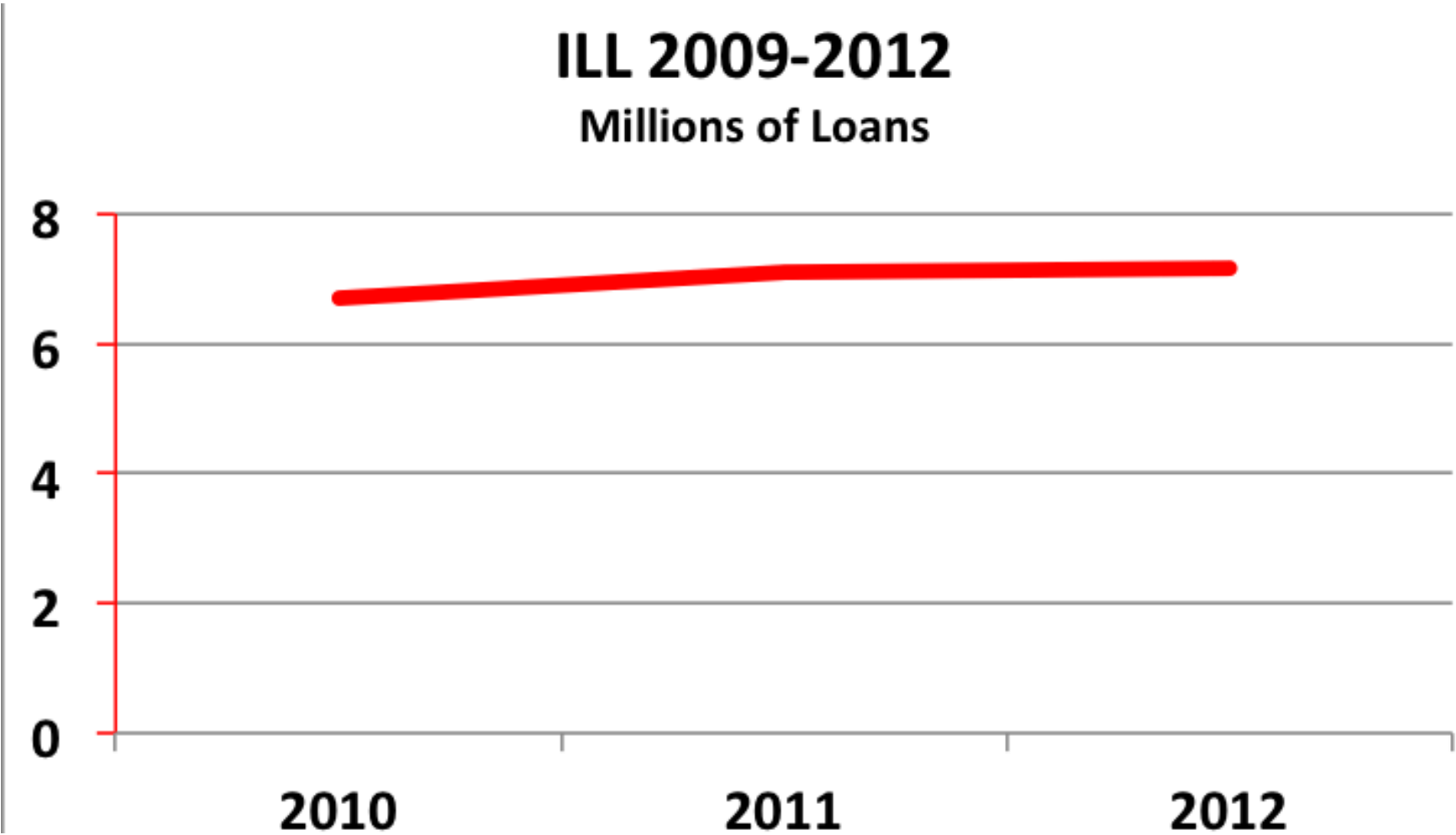
ILL 1999-2008

Millions of Loans



Massachusetts

ILL 2009-2012
Millions of Loans



Circulation & Holdings in PLs

- Total circulation has leveled off at 58 million
- Statewide ILL level at about 7 million
- eBook circulation tripled (2011-2012)
- Non-print holdings grew by 10%
- Print holdings grew by <1%

Many Silos

- 8 of 10 shared ILSs host OverDrive collections
- Numerous group licenses for databases
- Over 100 academic libraries with separate eContent licenses
- 1,000 K-12 libraries building content by district and individually
- Boston Public Library eCard = Shared silo

Statewide Resource Sharing Committee (SRSC)

- Called by State Agency – Mass. Board of Library Commissioners in April 2012
- Charge
 - To study current trends in technology and use of it; publishing and electronic dissemination of information; today's environment and how these impact Resource Sharing. Determine up to 5 strategic goals
- Membership
 - Shared Automated Networks
 - Four Library Types
 - Boston Public Library
 - MLS

The May 2012 Event

Resource Sharing Unbound

- Jamie LaRue – Douglas County Colorado
 - Ownership
 - Buy direct from publisher
 - Local Content
- Jim Neal – Columbia University and 2CUL
 - Radical resource sharing

The Call to Action

- Strong reaction from attendees
 - We should launch a DCL project in Massachusetts
 - Let's do it now!
- Opportunity to add local content
- Let's take a first step toward a statewide solution

SRSC Recommendations

- Three Committee Recommendations to enhance access to library content
 1. Statewide Library Card
 2. Discovery System
 - 3. eBook Platform**
 - Business Plan Approved
 - MLS as manager

Uniqueness

- Four library types
- Scale – 1,600 libraries
- Statewide access
- Multiple ILSs plus numerous standalone libs
 - Authentication
 - MARC Records
 - Interface
- Shared ownership
- Short-term funding

Benefits

- User-friendly, statewide shared eBook collection
- Statewide committees to determine policies
- Purchase, leasing, and other options
- Entrée to local content
- Preserve our vital resource sharing
- Efficiencies of centralized services
- Improved technology

Pilot Project

Components of the pilot project

What was the pilot going to look like?

- ❖ 50 Pilot Libraries representing public, academic, school and special libraries
- ❖ RFP for Platform and Content
- ❖ Task Forces
- ❖ Training & Implementation
- ❖ Assessment

Decisions & Timeline

What did we want to accomplish when?

- ❖ Not feasible to launch our own DCL model – too little time
- ❖ Put out RFP for a commercial vendor (s) for platform & content
- ❖ Exposure to many models and content, not just singular focus
- ❖ October 2012 – RSPC Business Plan accepted
- ❖ Original Timeline – May 2013 launch
- ❖ Current Timeline – September 2013 launch

Call for Proposals

How did we proceed with the RFP?

- ❖ RFP issued in April (2 charges: Platform & Content)
- ❖ Vendor Q & A Webinar
- ❖ Responses due April 29
- ❖ Evaluation of proposals by RFP Task Force – May
- ❖ Presentations by 7 out of the 13 responders – May
- ❖ Choose vendors and begin contract negotiations – June
- ❖ Pilot Project – September – December (push out to Mar 2014?)
- ❖ Statewide Rollout – Jan 2014 ? – December 2015

Pilot Expectations

- ❖ 50 multi-type library pilot project for 6 months
- ❖ Statewide Rollout over two years
- ❖ Budget for 18 months - \$400-600,000
- ❖ Other:
 - 10,000 titles
 - 10 automated networks
 - ILS integration
 - Multi-type content
 - Training & Publicity
 - End-user training
 - Evaluation/Feedback

Future

What factors determine our future?

❖ **Measuring Success**

- Collection – meets needs of users
- Device compatibility
- Ownership when applicable
- Availability of content
- Ease of end user
- Vendor customer service
- Multi-type library application
- Flexibility

❖ **Sustainability**

- Publics are spending <5% of materials budget on eBooks
- Shift from traditional one library purchase to statewide collection
- Other state support – finding the right source and niche

Vendors

Who are we negotiation with?



Contracts negotiations

What are the contract considerations and MLS Terms & Conditions?

- ❖ User Friendly
- ❖ Ownership & Transferability
- ❖ Short-term Loan
- ❖ Simultaneous users
- ❖ Interlibrary Loan
- ❖ Pricing – affordable, reasonable
- ❖ MARC records
- ❖ Authentication – Geo-location – Checkout
- ❖ Accessibility

Communications & Task Forces

What did we develop?

❖ **Communications:**

- Meetings & presentations
- MLS Guide –<http://guides.masslibsystem.org/ebookproject>
- MLS eBook Blog –<http://www.masslibsystem.org/ebook/>
- MBLC Newsroom –<http://mblc.state.ma.us/newsroom/>
- Pilot Library Internal Blog
- Google Docs
- Email listserv for pilot libraries

❖ **Task Forces:**

- PR, Promotion & Training
- Sustainability & Funding
- Collection Development & Policies

Shared collection development

How did the Collection Development Task Force define this?

- ❖ “Content Is King”
- ❖ Include the words “online” or “digital” to be all inclusive, not just eBooks
- ❖ Identify models – short term loan, DDA/PDA, ownership, local content curator & creator
- ❖ Publisher limitations
- ❖ Thresholds
- ❖ Cross Institutional
- ❖ Shared access
- ❖ Consortial/Statewide
- ❖ Duplication
- ❖ Acquisitions & Reconsiderations
- ❖ Balance needs
- ❖ Membership input & voting concerns

Content Selection Policy Guidelines

What are the guiding principles?

- ❖ The collection will serve users of all ages
- ❖ The collection will support a wide variety of learning and recreational needs
- ❖ The collection serves as a supplement to local library collections—it is not intended as a replacement for local library collections
- ❖ Ownership of content is a preference, but not a requirement

What are the issues that need to be addressed?

- ❖ Digital formats and file sizes (including file quality)
- ❖ Selection criteria
- ❖ Deselection criteria
- ❖ Holds queue length/automatic purchase
- ❖ Lending periods
- ❖ Metadata requirements
- ❖ Suggestions for purchase from library patrons/library staff
- ❖ Donations from patrons
- ❖ Sharing locally licensed collections
- ❖ Locally created content
- ❖ Public objection to selected material

Value of shared collection

Where the rubber meets the road?

- ❖ Consortial vs. Local – more affordable?
- ❖ Long-term vs. Short-term Loans – advantages to ownership – when and what types of collections?
- ❖ Expand current model or contract with different terms – what publishers are available, how relevant and current is collection, make sense to look at aggregators?
- ❖ Central Site Workflow vs. Individual Workflow – Centralized system easier? More flexible? Sustainable?
- ❖ Discovery Layer vs. One ILS – is there a discovery layer that can be implemented down the road to make this all easier?

Publisher negotiations

Where do we go from here?

- ❖ Be involved in conversations with other states doing similar projects
- ❖ Join the [Readers First](#) community
- ❖ Join ALA's [Authors for eBooks](#) effort
- ❖ Educate the public
- ❖ Educate local publishers and authors
- ❖ Encourage pricing models that are affordable and reasonable
- ❖ Promote ownership and accessibility to ALL content
- ❖ “Just in time” is a solution

Opportunities

Where can we go from here?

- ❖ Biggest challenge – Sustainability
- ❖ MLS Organizational Changes
- ❖ Integrated search (Discovery) for all MA content
- ❖ Boston Public Library eCard
- ❖ Statewide library card
- ❖ Expand to out-of-state lending partners
- ❖ Patron-centric eBook platform
- ❖ Partnerships with local content providers
- ❖ Beyond eBooks
- ❖ Name of project – “eBook Revolution”?

Questions??

Thank you!

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