

E-Content Committee Minutes

June 9, 2015

Attendees

Shelley Walchak, Pine River, Chair
John Major, Alysa Selby & Emily Veenstra-Ott, Bud Werner/Steamboat Springs
Alfredo Pinto, Colorado Christian University
Yuliya Lef, Colorado Mountain College
Diane Levin, Eagle Valley
Jon Solomon, Englewood Public Library
Amy Shipley, Garfield County
Heidi McNinch, Grand County
Sharlene Harvey & Jennifer Murrell, Mesa County
Kristen Baldwin, Rampart Library District
Joyce Dierauer, Summit County
Jo Norris, Vail Public Library
Tiffanie Wick, Western State Colorado University
Alison Farnham, Wilkinson/Telluride
Pascal Brammeier, Marmot
Tammy Poquette, Marmot
Jimmy Thomas, Marmot

Jimmy – Update on McGraw-Hill

The information about McGraw-Hill was distributed June 5th (see email – “McGraw-Hill ebooks order 2015 by Marmot Library Network”) as a reminder of what we ordered a year ago from McGraw-Hill. We went through the title list that McGraw-Hill sent to us and try to come as close as possible to a title list that matches the clusters that we ordered the way McGraw-Hill is bundling them for us. The problem with that we ordered three clusters last year and now they only make entire collection updates. What we end up with if we are going to buy these in collections, related to the clusters that we buy, is a \$12,000 order. Jimmy sent out a reminder (see email from June 7th – “McGraw-Hill Usage stats for 2014”) after someone asked for the stats that we saw on the McGraw-Hill titles. Someone else asked for what's the dollars per circ that we have been spending. The circ stats were not being logged by Pika like they used to be by the previous version of VuFind, but I was guessing that even \$50 a circ. The majority of the libraries do not want to buy McGraw-Hill as a cluster. Instead, there was a pretty responding consensus for go with acquiring McGraw-Hill titles individually through OverDrive. At this time, we are going to leave the McGraw-Hill titles that are already sitting on the content server open. They are available, they can be checked out and downloaded and we can buy new editions from overdrive and they will become part of the collection. Members thought that they should be weeded at some point but in maybe a couple years or a year. We do not think we should keep them forever, but we do not think it's time to get rid of them quite yet.

Action Item: Jimmy will notify McGraw-Hill rep that we look forward to buying books from them by way of overdrive.

Jimmy – Update on Britannica

I do have a spreadsheet from Jade Lewandowski that were set-up and priced for public libraries specifically, or for all 99. She misinterpreted sites as institutions but it's still the same problem. It's the difficulty of organizing a lot of diverse attitudes about what needs to be bought next and getting a consensus wrapped around clusters of books like this is a of segment of the catalog that Britannica sent out. The applied science collection which we could buy unlimited access to for near \$10,000 which is about 26 books. Jade did this with what were the most popular collections in public libraries in particular and said here's what it would cost to buy this collection, this still has the opportunity to build some collections of unlimited circ titles that have value either in school classroom settings, or the things that we do with

our max access collection. This looks promising, but it's got all the same problems as we see with McGraw-Hill that it's difficult to get all the players together for a list of titles that is broadly applicable to all marmot members. We did have a small group meeting about Britannica with Shelley, Jo and Chris. Is there anything about that conversation that we wanted to share?

Jo - I think that our consensus at that time really was to approach Britannica the same way we are now going to approach on McGraw-Hill, and buy individual titles that meet individual library, or what we perceive as individual library needs to be shared among the library's patrons. We did see even before this last wrinkle with McGraw-Hill at maintaining collections and coming up with money was just more difficult than going through OverDrive and buying single copies.

Jimmy – I would like to post a table of publishers that Marmot has evaluated with some kind of a status of have we bought from them direct before and as of the last time this post was considered is the door open or closed. I would love to be able to answer on a page on our wiki that McGraw-Hill, we did buy in 2014, we did decide not to buy more direct in 2015, but we did decide to continue buying through overdrive and that is a consensus of the group as the current status. In the meantime, I think the status of McGraw-Hill and Britannia is to encourage member to buy through OverDrive.

Action Item: Jimmy will work with Tammy to come up with a page in the wiki with a table of publishers.

Shelley – Update on WMA

We have two representative at OverDrive. They are Mo Hamdan and Andrew (Andy) Bucher. Shelley got in touch with Mo Hamdan about the WMA titles. The report that he sent out sounded very reasonable to her. Shelley knows that the members were concerned at the last meeting, because we thought there was 600+ titles that were no longer going to be available through OverDrive. It turns out that the latest amount is 157 titles that they could not get publishers to change the format. One thing Mo did not put in this memo (see email – June 4th “WMA Sunset Information”), is how much credit we would get for the 157 titles. The number Shelley remembers seeing is \$.50 per title. I think that the basic purpose that OverDrive was after was to make sure that we provide content that the majority of people were using. If you looked at that ping file from Shelley’s email, with the checkout stats for the last year, the WMA titles were only 2 or 3%. Shelley welcomed anyone's comments. She wonders if anyone else wants her to do any more follow-up?

Joyce - My only question is that ultimately, if it's a 157 titles that would be about \$78 for a credit, where does that credit actually go? Does it go to the Marmot Digital Library collection that I use to buy the extra copies, or goes it get divided amongst everybody that worked on purchasing those titles? I don't understand how that credit is given to us.

Action Item: Shelly will check with Mo to find out who gets the credit. She believes the money will go to the MDL collection. She will send an email to the E-content Listserv.

Jimmy - Overdrive costs

He sends out an OverDrive budget report to the directors every quarter. He displayed the one that was sent out at the end of Q1 showing actual amount spent. Marmot tracks every quarter and Jimmy reports to the directors what each library has been spending. We are now on the verge of sending out an invoice for the budget. The entire budget of \$155,000 which includes the libraries on the spreadsheet. The point of this is to say there is about \$35,000 worth of items we need to buy regularly to fulfill holds and renew titles. These titles need to be renewed if they're still popular. Joyce and Alysa now do that by alternating month by month doing these purchases on behalf of the entire consortium, spending the money which is 22% of what you all intended to spend for the year.

Jimmy - Does anyone remember why I was going to talk about this at this meeting, or have I answered questions that were on your mind?

Joyce - could be something she brought up. She wonders if \$35,000 is truly enough to cover the amount of items that Alysa and I are seeing that need to get extra copies, because there are so many holds on them?

Jo - I have another question, the last time I was in ordering in quarter two my whole order was basically looking at how many holds were out there on titles that we needed extra copies for, I realized that it's been Joyce and Alysa normally. She spent over \$700 a month ago buying extra copies for things that had enormous hold queues.

Jo - question for the group: so there is another to approach it. Do we put a certain percentage towards the monies for Alysa and Joyce to spend, and then go in our own and say I'm willing to spend my money not on a new title but on an extra copies. Does it hurt to do this?

Jimmy - I don't think it hurts at all. I think there is something about the acquisitions process that is very organic. You all are buying stuff based on a lot of factors, and the overall collection rises in a way that serves everybody, but I don't think it's in conflict for you, Jo, to be focusing on hold queues. How much more we need to coordinate this is a great question. I don't know.

Shelley: at ACDC the way we did it was everybody contributed a portion of their of content dollars to a fund. Then we set up a control that was something like when we reached X number of holds on that item. We automatically ordered a new item out of pooled money there were a of couple factors that went into it, number of holds and total number of copies and we set up the controls.

Jimmy - that is the holds fulfillment option of OverDrive which marmot libraries tried a few years ago. We turned it on in 2012 for about three months. The amount of money that people were comfortable allocating to this the hold fulfillment logic automatically spent the budget in the first day or two of the month. There was no room for the rest of the month for people like Joyce to look more carefully to see what needed to be done rather than letting the money get spent very quickly automatically without any oversight.

Jimmy - Joyce am I remembered that correctly?

Joyce - very correctly. The other thing that has changed since than is that Random House & the original Penguin titles now we have these things that are leases. That changes everything again because we never had things expiring.

Alysa - echoes Joyce's concern the amount of money that we spend renewing our leases, we have so little left over for holds it's pretty disconcerting that after you spent all your money, you still see hold ratios in excess of 10 - 1. Alysa supports Jo's concept that if you don't want to buy new titles and you just want to fulfill holds feel free to do that. She also wants to be able to expand the collection and broaden it for the other popular titles that people are seeking within our library.

Joyce - totally agrees with Alysa that we have to find some kind of balance we have many people who use this service, who are waiting for new items. This people are very disappointed, because there are no new items for them to read.

Amy - Publishers Weekly has the best seller list, and she goes through those to see what she can find in overdrive and try to buy as many as she can. She finds that her budget gets eaten up really fast by doing that. She agrees with Alysa that she is broadening the collection by getting new popular items. She is trying to say that as a group we are not doing anything wrong. She does not know that we need to change anything about what we're doing. We need to keep talking about it and thinking about it, and potentially budgeting more each year towards it.

Joyce - would like to add one more thing. She does still buy a lot of audios, because we do have many people who spend a lot of time in their cars for various reasons the love the downloadable audios as well. She is not spending all her money on eBooks. Audiobooks cost a lot of money. There must be a lot of other people in other libraries doing it as well, because I see significant holds showing up on them as well, so I have to buy extra copies of those too.

Shelley – we do as well at Pine River

Jimmy - would like to endorse or second what Amy just said. I think we're doing the best we can with the money available. I think this of the great time to look at the policy stated here and endorse it for the remainder of the year that we've got. It's tempting to say could we simplify the charter for Joyce and Alysa to only look at holds, or only look at renewing the copies that expire and plus the max access. The way we are rigged right now 22% of whatever budget each member states is preallocated to whatever Joyce and Alysa are buying. If people are comfortable with the way this is stated right now, than that is all we can do today.

Joyce: I have one more thing to bring up. As she is looking at the titles of the leases that are ending, she is looking at how many times they have checked out. In many cases some of the kids stuff we bought last year has not checked out very much, so weighing whether it's worth buying it again. If it did not cost that much the first time, she is thinking we'll give it another time and see and some cases it cost a fair amount, and only checked out two times. She would like some input from the group, should there be a number of checks that should happen before we determined that a title is worth keeping in the collection? We do that with the regular collection what is that magic number, I don't know yet.

Member: more than two.

Emily - suggestion that maybe not a number of times an item needs to checkout, but perhaps a cost per use, and decide what that number should be.

Jimmy- every year or so, he asks if we shouldn't have an overdrive collection development policy and what in particular would be nice. Joyce and Alysa if you both wrote down briefly, but here's what we do this is basically the practice we're behaving with, it's not a policy it's what you're doing and even if you wrote that down in a form that people could respond to you. A handful of facts. Alysa - sure that makes total sense. Joyce agrees.

Action Item: Alysa will draft a document about what is happening behind the scenes when renewing and ordering items from Marmot through OverDrive. Joyce will review it. At the next meeting, we could take a look at it.

Item 4: at the last meeting the discussion was a statement that Hoopla allows individual libraries control a pay-for-view model how should Marmot do controls on monthly expense limit, check outs, etc. Pascal got back to use to reported that Hoopla financial controls are only available through Hoopla and not Pika.

Jimmy – thinks it was just a question, and Mark and Pascal are at the point where the they have not done anything with development to allow control to come through Pika.

Pascal - That's correct. We are not allowed to do it through Pika, but will look into it in the future.

Jimmy - not allowed or logically not appropriate to do?

Pascal - from my understanding, we would not be able to do it, because it's Hoopla's controls and with our interactions, we interact with the site and then the financial controls are on their services.

Alysa – she talked to Mark about this too when we were given this information, and Mark said if the APIs had the price per circ in the record, than Pika could put those controls in place. They would just not make those records

viewable. if I remember correctly, the APIs do not have the price, so it would be an all or none switch to feature all of this record in the catalog, and I think we all agreed to go ahead and feature them, and deal with the prices as we see our bills and reevaluate.

Item 5: reserved for discussions outside of the agenda. A lot of emails that we're going around about on expired patrons. I don't think we ever really came to a decision.

Alysa: This started when a Bud Werner board member called and got upset with one of their department heads, because she went to download an overdrive eBook and her account has expired. She could not believe that she could not fix it at 10:00 PM when she wanted to download her eBook, before she went to bed. This prompted the whole discussion about the controls that are in place, not only from Pika but from Overdrive, and what could we do about that situation. We thought about the patron due date, which is one of the options that Jimmy purposed.

Alysa - Any director of a library wants their patron's data to be as accurate as possible it comes down to set of choices.

We as the Marmot collective have agreed to block patrons from downloading OverDrive materials if their patron accounts have expired and that is a collective decision we had to make as a group as part of OverDrive.

Option 1: is we change our minds on that policy.

Option 2: our OverDrive rep, Andy, told Alysa that Advantage libraries could have their own person settings, but it would require a reformatting of our APIs until records are loaded into Pika.

Option 3: Renew online. However, Sierra never supported that function, so it's not an option. Mark thought it was an option in Sierra, so Alysa asked Brandon if he could investigate. There still is no solid answer on that front.

Alysa – she imagines that if libraries really wanted this feature that perhaps it's really more discussion for the discovery committee.

Jimmy - I wonder if the compromise between both would be to allow expire patrons to download eBooks in a way that they are not allowed to check out physical books, library property. We do pay a lot of money for these resources. We would have a few random patrons who get away with checking out an eBook, even though their account has expired. This would be lightly aggravating, but not as damaging as letting physical materials leave the library.

Jimmy – Alysa, did we determined that we could just tell overdrive to ignore the patron expiration date to allow checkouts regardless of expiration date?

Alysa – yes, that was the initial email that she sent out. That is the easiest setting to change. That is the simplest solution. She has to be honest we had this discuss a year ago and overwhelming people did not want to allow people to download materials from overdrive if their patron account had expired.

Alysa - she feels like Jimmy does that they pay a lot for these materials, it's not like our stuff is walking out of the library, we not going to lose it. They are not getting fines for it, so who cares if their patron account has expired. Let them download those OverDrive materials. She knows that not everyone shares that perspective.

Shelley - Alysa, your comment in one of the emails about sending a notice to patrons to let them know that their account is about to expire. If that is an option, is there some way we can do that? if a board member comes up to say I try to download in eBook last night at 10:00 pm and my account was expired, well sorry, we send you a notice two weeks ago that your account was about to expire. That would at least put the responsibility of them, and it would also still keep track of the fact that they are actually eligible free library users in our on area. If that is something acceptable, we need to know whether not we can do that with the notice?

Amy - we recently asked that question from the prospective, can staff be notified at checkout that the patron will be expiring soon? If this notice could happen, before they check out items, so the due date won't default to their expiration date. Right now, Sierra can't even do that, so she does not think it can send a notice to patrons to let them know their account is expiring.

Amy – She had a couple of thoughts. What if we implemented an online account renewal that could be renewed for 30 days with a warning that at a patron needs to do a full renewal at the library in 30 days. That would allow them to check out their eBook at that immediate moment when they are in that emergency situation, but let them know it will not be a permanent thing. Alternatively, there is a message field in the fix field of the patron record that indicates to staff that the record needs to be checked. If we allow an online update of the patron record via Pika, it could trigger that fixed field to be changed in Sierra to notify staff that the information still needs to be verified.

Jimmy - I like it

Emily - I liked Amy's ideas. However, that only works if patrons are checking out at the circ desk. It does not work for the people who check out using shelf-check and it doesn't really solve the initial problem with people who use the digital collection almost exclusively. How do you allow them access to their digital content when library is not open?

Shelley - could we at least check with iii to see if we can send a notice to patrons about their account is about to expire?

Tammy – while I was at the IUG conference at one of my sessions, I remember hearing that Sierra will have the ability to send notices that a patron is going to expire.

Action Item: Tammy will find out if Sierra will have an option to send out notices that a patron account will be expiring.

Action Item: Pascal will give some thoughts to at the point where the user would be denied a checkout because of an expiration date, run a little subroutine to fill out a form to renew your account for 30 days (of the concept using the patron updated API today plus 30 into the patron's record), before handing them off to overdrive.

Note: Jimmy is not asking Pascal to write the code, just to put a little thought into how much effort it would take to develop a feature like that and will bring back the next meeting.

Two things to consider:

- 1) level of effort which is an important way for you to gauge what members are asking of the Marmot development group
- 2) News about the you're about to expire notices

Alysa - the 3rd item should be all of us going back to our directors and asking about a very simple option to turn off the setting in overdrive, is that an option for your library? She thinks we need to have that conversation as well, since that is the simplest solution to the problem.

Action Item: Marmot will put out a SurveyMonkey to directors to make sure we reach all 27 directors. Alysa will send the questions to Tammy to put in a SurveyMonkey.

Shelley - we have 2 minutes left and I want to report on Zino. The Zino question was whether this committee wanted to see a Zino, Flipster and an OverDrive periodicals demo sometime this summer? Do we do another RFP

this year for Zinio vs Flipster vs OverDrive Periodical? A group decision was made not to go forward with any demos this summer, or RFP for emagines this year.

Any other items?

Jimmy - we noticed that GoTo Meeting was much better with Marmot using a wired connection. However, we are still issues with people have trouble knowing how to join the meeting.

Action Item: Tammy will look into a way to have a static link for our meetings using a personal meeting room. She will also send out a link to a video about how to use GoTo Meeting.

Our next meeting is July 14th at 1 p.m.