



## **Package vs. Title-by-Title Purchasing Considerations for E-Monographs** *Endorsed by the Collection Development Committee (CDC) and the Collection Licensing Group (CLS), November 2013*

The following checklist is useful when considering whether to pursue package vs. title-by-title purchasing options for online monographic content.

**Package purchasing may be preferred over title-by-title purchasing when the package provides all or most of the following benefits to UC:**

### **Financial benefits**

- The cost is comparable to or less than current spend with the publisher(s) in question, or is equivalent to or less than other e-options at volumes likely to continue to be purchased
- The cost is sustainable from year to year, with good cost control for annual price increases

### **Collection value**

- There is a critical mass of existing purchasing from the publisher or publishers
- the composition of the package offers significant collection value in terms of suitability, breadth and/or volume of content, quality and reliability
- The package will add titles of value that are currently unavailable, increasing the extent and breadth of valuable acquisitions for a comparable (or reasonable) spend
- The purchase will not crowd out other important acquisitions, because comparable funds are likely to be spent on these titles in any event, or because the titles in the package have a sufficiently high collection priority

### **Consortial benefits**

- Usage is anticipated to be significant and broadly distributed across the participating campuses
- The package will extend access to desired content at campuses at which it is currently unavailable, increasing the value of this content for a comparable (or reasonable additional) spend
- Purchasing as a package will create value for all participating campuses by increasing access, lowering costs, or both

### **Strategic benefits**

- Supports our goal of facilitating largescale conversion to e-monographs where there is critical mass and sufficient demand
- Advances scholarly communication goals, by supporting non-profit and/or transformative publishing models
- Advances licensing principles and best practices (e-ILL, course-related uses, perpetual rights, and absence of DRM)
- Supports UC Libraries ebook principles and preferred practices
- Is in a subject area whose users are comfortable relinquishing print; or alternatively, offers print at reduced pricing or as a free archive
- Includes content that UC Libraries are committed to preserving for the long term, regardless of current use.

### **Usability**

- The platform offers state-of-the-art functionality
- The platform supports acceptable usage rights and conforms to UC Libraries principles

### **Administrative efficiencies**

- The publisher works well with monograph vendors, including timely information about e-availability and any content exclusions, allowing profiles to be adjusted to avoid unwanted duplicate purchasing
- Ebook publishing is timely in relation to print, allowing UC to avoid unwanted duplicate purchasing

**Title-by-title purchasing (including approval and demand-driven approaches) is preferred when packages are unavailable, or when selective purchasing is likely to provide greater benefits in these areas:**

**Financial benefits**

- Additional cost control is needed beyond what package purchasing might offer
- Maintaining a package license on an ongoing basis is expected to be infeasible due to cost and/or anticipated cost increases

**Collection benefits**

- The publisher and/or content is in the long-tail of purchasing and/or usage
- Content is expected to continue to be available for purchase on an ongoing basis without going out of print, reducing the risk of a selective or demand-driven approach

**Consortial value**

- Allows UC to acquire fewer copies of a given set of titles at lower cost while adequately meeting systemwide demand

**Strategic benefits**

- Supports the desire to experiment with the cost, user impact, and service benefits of demand-driven collection building on a consortial basis
- The platform includes desired licensing terms in terms of usage, ILL and course use, perpetual rights, absence of DRM, etc.
- A mixed print and electronic environment is needed to support a range of disciplines and user needs
- Advances scholarly communication goals, by supporting non-profit and/or transformative publishing models
- Advances licensing principles and best practices (e-ILL, course-related uses, perpetual rights, and absence of DRM)
- Supports UC Libraries ebook principles and preferred practices

**Usability**

- Purchase through an aggregator provides service benefits in terms of availability of a broad selection of titles from multiple publishers on a single platform with good usability and usage rights

**Administrative efficiencies**

- An integrated approach and workflow for print and e-purchasing is desired (e.g. by working with vendors on approval or DDA models)

**Posted 12/5/2013:** <http://www.cdlib.org/services/collections/ebookpackage.rtf>

**Contact:** Wendy Parfrey, CDL (wendy.parfrey@ucop.edu)