FEATURE

A Comparative Study of the Implementation

Management, and Evaluation of Evidence-Based Acquisition Ebook Plans in Academic and Research Libraries

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Ebook evidence-based acquisition (EBA) models have emerged as an important strategy for providing broad access to ebook content while preserving librarian autonomy and agency. As opposed to demand-driven acquisition programs, which have received significant study within the collection management literature, EBA programs are less researched. A survey of academic and research librarians' experiences with EBA was conducted to explore adoption decisions, motivations, management, selection, and overall impressions of EBA programs. Results suggest that EBA programs are becoming more popular and that motivations for their adoption are varied. The results underscore notable challenges and preferences in terms of budgeting, management, and title and program selection. Further work is suggested to deepen the profession's understanding of how EBA programs fit within multiple ebook acquisition approaches.

Introduction

Ebooks have become increasingly common in academic libraries over the last two decades, with the uptake accelerating because of COVID lockdowns.[1] During this time, new models of ebook monograph acquisition—made possible by the new format—came into existence, including demand-driven acquisition (DDA) and evidence-based acquisition (EBA) alongside more established and "traditional" models, such as packages and firm orders.[2] DDA programs have reached a level of maturity, while at the same time evolving considering changes in the marketplace and publisher offerings (e.g., changes in short-term loan allowances). The DDA model is well studied, but EBA is a newer collection method, so the literature regarding it is limited.[3]

EBA models, sometimes referred to as evidence-based selection or user-based collection management models, are monograph-purchasing models in which a library licenses access to a large corpus of ebooks, usually from a single publisher, for a set period, typically a year. At the end of the term, the library selects titles for which to acquire permanent access, using the funds pledged in advance. EBA has emerged as a compromise between pure demand-driven approaches to ebook acquisitions and individual selection.[4] These models allow for some cost containment while also providing a wide range of content and flexibility in selection, along with more publisher revenue stability. These advantages may be coupled with potential negative aspects, including low return on investment (ROI), time- and

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resource-consuming management of multiple publisher plans, and content limitations on the part of publishers that exclude most popular titles.

The National Information Standards Organization (NISO), in partnership with vendors, publishers, and librarians, has developed best practices relating to DDA of monographs.[5] The standard addresses a wide array of germane issues, including the management of discovery or candidate records at both the institutional and consortial levels, service implementation (to more transaction-based services for vendors, including the introduction of new features such as usage purchase triggers), and better measurement of usage. The NISO standard makes some reference to EBA, as a variant or alternative of the DDA model, but there were few EBA implementations, aside from some experiments, at the time of the NISO publication (e.g., University of Denver, Brigham-Young and the Orbis Cascade Alliance are notable examples in the 2014–2015 period). Our findings suggest that a set of more widely shared best practices or standards for EBA would benefit the library community, particularly standardized usage data calculation and reporting by vendors.

Literature Review

Early experiments with EBA frequently refer to this model in different terms, for example, as a sunk cost model, rather than specifically as "EBA."[6] Although the term was used earlier to denote general data-driven collections strategies for collection development,[7] the first mentions of EBA as we know it occurred at conferences in 2014,[8] journals in 2015,[9] and collection development references and guides in 2016.[10] Almost all of the literature since has consisted of case studies primarily focusing on the technical issues of implementing EBA or overall performance of the plan.[11]

The focus of this study is the issues surrounding selection of EBA programs, management of said programs, identification of individual titles for purchase from those programs, and renewal or cancellation of programs. Although many of these articles offer glimpses of the libraries' methods, only three recent articles report substantially on them.[12]

EBA Program Selection and Strategy

Carrico et al. provide a good overall set of considerations when beginning an EBA plan, including:

- Is the primary goal access, ownership, or a combination of both?
- Does the library's primary goal include a greater ROI for purchased ebooks and/or streaming videos?
- Do the librarians prefer unmediated user-driven acquisition models or some mediation in purchasing decisions?
- Are current ebook subscription packages providing value to users through repeat use, justifying annual expenditures?
- Are librarian-selected individual ebook titles seeing enough usage to justify their purchase?
- Are there specific publishers whose content is highly valued and consistently used?[13]

Although some studies note that they chose their specific EBA programs using general criteria, such as number of titles or affordability, a couple describe using formal rubrics to select their EBA programs. The majority of articles on EBA that comment on how the programs were selected mention a preference for the inclusion of a large number of titles and an affordable price point. Pilgrim and Dolabaille, reporting on their EBA work at the Alma Jordan Library (AJL) at the University of the West Indies, St. Augustine Campus in 2019, describe the use of a more sophisticated rubric:

- Subject scope: coverage of subject areas was important because the St. Augustine Campus offered a wide range of courses. It was suggested that the broadest range of titles would be the best option when selecting an EBA program.
- Quantity and currency: the number of titles and currency of the collection. The collection chosen needed to be current and not include too many dated publications.
- Patron access: the duration of the program during which time patrons would have access to the titles.
- Vendor relationship: the existing relationship with the vendor.[14]

Pilgrim and Dolabaille note that they were aware of a different rubric created by Robbeloth, Ragucci, and DeShazo to choose EBA programs for the Orbis Cascade Alliance of libraries. However, Pilgrim and Dolabaille chose not to use it. That previously published rubric included the following criteria: "diversity of publishers, DRM [Digital Rights Management]-free, ILL [Interlibrary Loan] rights, price and title stability, ADA [American Disability Act] compliance, interface quality, record management, usage report quality, deposit amount, (title) pricing, and total cost."[15]

Title Selection

Title selection was not mentioned or only briefly touched on in almost all of the twenty-eight EBA-related publications reviewed for this article. Most authors reported selecting in an automated fashion, beginning with the most used titles and continuing downward until the commitment is exhausted. However, Jacobs and Hellman document the development of more involved title selection criteria and process rubric for selection from their EBA programs at San Francisco State University.[16] The criteria combine usage, including usage patterns over time, multiple alternate usage counts, cost-per-use (CPU) calculations, and subject selector picks. General collections staff purchased high-use titles preferentially and then provided more sophisticated usage indicators for the selectors to aid in their selection among mid-use titles. Pilgrim and Dolabaille developed a similar process at their library; acquisitions staff create lists of unowned titles sorted by main subject disciplines for selection by the liaison librarian. Pilgrim and Dolabaille state:

> Although there was no evidence in the literature of the liaison librarian's involvement in the selection process, [Jacobs & Hellman, 2023 having not yet seen print], at the AJL, it was important to include these stakeholders because of their thorough knowledge of the subject collections and their core responsibility of collection development.[17]

Before focusing on the EBA program renewal decision process for their consortium, which was the main thrust of their article, Birchhall, Devarenne, and Wegmann briefly describe their title selection process:

> For selecting titles to add to our permanent collection at the end of the EBA period, we collect data on title usage, overlap with print and electronic holdings, and number of Orbis Cascade Alliance libraries holding the title to indicate ILL availability. This data is used on a title level to select items and not used to evaluate the EBA program as whole.[18]

Whether this analysis is done by the subject librarian or collection manager varies by library but is nearly omnipresent.

EBA Program Evaluation

To evaluate EBA programs, Birchhall, Devarenne, and Wegmann focused on comparability not only between their two EBA programs, but between EBA programs and other subscription services. To that end, they analyzed what data they could extract from EBA programs, what they could learn from it, and how it would affect the renewal decision-making. In the end, they produced reports that listed unique titles used, percentage of collection used, usage distribution, and number of titles by usage (under fifty) that they provided to their decision-makers.[19] Jacobs and Hellman[20] considered some of the same metrics, but hit difficulty with the opacity of COUNTER usage reports, particularly because they are affected by the EBA platform and individual vendor decisions on which clicks count. These considerations are echoed in many of the responses we received to our survey, as each library with EBA programs discovers the complexities of making best use of them. However, there is little evidence of research conducted to learn what other libraries are doing, through the literature or informally.

Methods

This study presents the results of a survey of librarians at a wide range of academic libraries. The researchers created and distributed the survey using Qualtrics in the summer of 2024. Survey results and codebook are available via Mendeley.[21] The survey and study were submitted to the institutional review board (IRB) of Emory University, and it was determined that the study was exempt from IRB approval. The researchers distributed the survey via several professional forums and email lists.[22] The survey was open from July 10, 2024, to August 26, 2024. Participants were given the option of including their names and email addresses for possible follow-up interviews, and institution names were collected to ensure that only one response per institution was counted for quantitative results. Participant and institutional identities were not used in the analysis of responses, although relevant characteristics of the institutions, such as student full-time equivalent (FTE), were considered when reviewing results. If more than one response was given from an institution, the numerical responses from the higher-ranking position, typically the department head, were used, but free text responses from all surveys were included in the analysis. Survey results were cleaned in Microsoft Excel to remove uncompleted surveys and to facilitate analysis. Examples of cleanup steps taken include normalizing spellings, removing extraneous text from responses that asked for numbers, and converting numbers from words to numerals. Calculations and visualizations were made using Excel.

RESULTS

Institutional Characteristics and Ebook Practices

The survey yielded eighty-four completed surveys with results from eighty-one unique institutions. As shown in table 1, participants (n = 81) represented a variety of Carnegie Classification institution types, but the largest number of participants was from those with R1 classifications (44.4 percent). R2 institutions were also strongly represented (27.2 percent), but relatively few participants were from master's-only granting institutions (7.4 percent), baccalaureate-only granting institutions (9.8 percent), or community colleges (1.2 percent). A final 9.9 percent were from outside of the United States and did not fall neatly into these categories.

Table 1. Breakdown of Research Level of Survey Respondents

Classification	Count	Percentage
Community college	1	1.2%
Baccalaureate-only granting institution	8	9.9%
Master's-only granting institution	6	7.4%
R2 doctoral granting institution	22	27.2%
R1 doctoral granting institution	36	44.4%
Other (if outside of United States)	8	9.9%

Figure 1 shows the student FTE distributions. The largest number of participants was from institutions with a student FTE greater than 20,000 (42 percent). Medium-size institutions with a student FTE

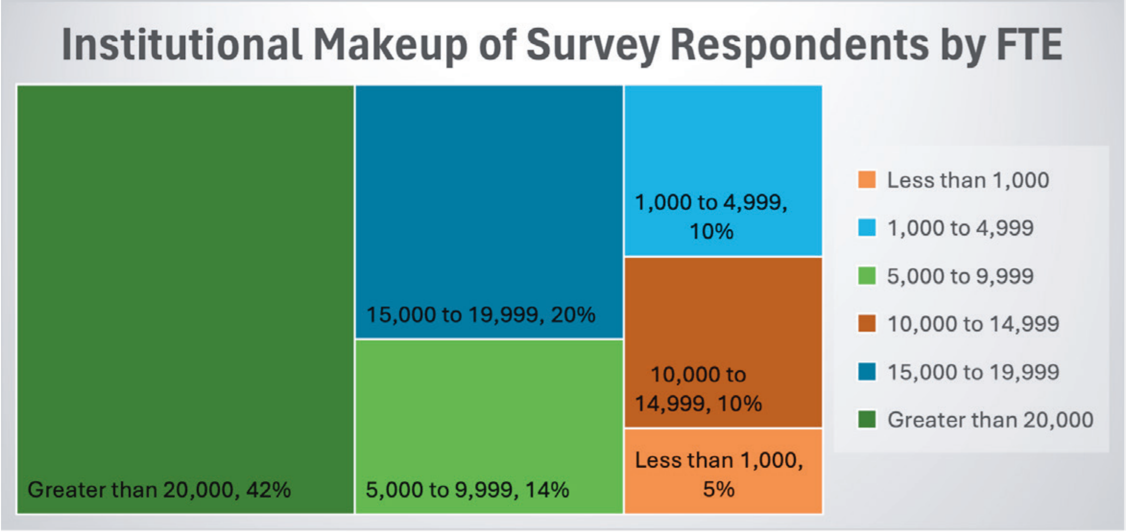

Figure 1. Institutional makeup of survey respondents in terms of FTE.

of 15,000 to 20,000 were also well represented (20 percent), with the remaining smaller institutions. Collection budgets at those institutions varied widely, but the largest portion had collections budgets in the $1 to $5 million range (39.5 percent) or $5 to $10 million range (19.8 percent). Table 2 shows the full collection budget distributions.

Table 2. Breakdown of Overall Collections Budgets of Survey Respondents

Collections Budget	No. of Respondents	Percentage
$1 million or less	10	12.3%
$1 to $5 million	32	39.5%
$5 to 10 million	16	19.8%
$10 to $15 million	11	13.6%
$15 to $20 million	7	8.6%
Greater than $20 million	2	2.5%
Other (non-US currency)	3	3.7%

Although the survey focused primarily on EBA programs, only sixty-nine of the eighty-one participants (85.2 percent) said their institution was currently participating in an EBA. A majority of participants who responded to the question (n = 80) reported having discontinued at least one EBA in the past five years (55.5 percent). Five participants (6.2 percent) reported that their institution did not currently have an EBA but had discontinued at least one in the past five years. Seven participants (8.8 percent) reported their institution had neither participated in nor discontinued an EBA in the past five years. Because our survey was distributed preferentially to librarians managing EBA programs, the actual percentage of libraries without EBA programs is likely significantly higher. Survey participants (n = 81) were asked a series of questions about their ebook collection practices. When asked to estimate the percentage of their collections budget that went toward ebooks, most reported spending less than 20 percent on ebooks (82.7 percent); the most common amount selected was 5 to 10 percent of the collection budget (33.3 percent). Participants were asked to estimate how their ebook spending was split across four common acquisition methods: firm orders, EBA programs, DDA programs, and packages. Practices varied widely; on average, packages claimed the biggest portion of ebook funds, but some institutions spent more on firm orders or EBA programs (see table 3). EBA programs typically claimed between 5 and 35 percent of funds, but some spent much more and, as noted earlier, some did not participate in any EBA programs.

Table 3. Ebook Acquisition Models Reported By Survey Respondents

Ebook Acquisition Model	Minimum/Maximum	Mean	Standard Deviation	Median
Firm orders (n = 81)	0%/100%	23%	22.8	16%
Evidence-based acquisition (n = 81)	20%/80%	22%	19.7	20%
Demand-driven acquisition	0%/75%	7.6%	11.5	2%
Ebook subscriptions/packages (n = 81)	0%/100%	37.6%	29.4	32%
Other	0%/64%	4.2%	11.5	0%

Note: Although not specifically delineated or suggested, “other” might include ebook approvals.

Individual respondents provided estimates of proportions of ebook budgets dedicated to various available acquisition strategies. Surveyed libraries still dedicate substantial percentages of their budgets to firm orders. In terms of the balance between DDA and EBA, EBA seems to be preferred. As one R1 respondent noted, EBA is preferred over DDA from several positions: "(1) predictability of cost, (2) entire ebook frontlists from subject-diverse publishers, (3) no DRM, [and] (4) helping selectors free their time to focus on selections from smaller/more diverse publishers" (R1, >20,000 FTE).

Most respondents currently participating in at least one EBA (n = 66) indicated they participate in more than one (84.8 percent). Figure 2 shows the distribution of number of EBA programs, with the mode (31.8 percent) participating in two EBA programs and some participating in many more. Several participants commented on the number of EBA programs at their institutions, with one participant saying, "We would like to expand our EBA programs in coming years but are limited by budget cuts" (R1, 15,000–20,000 FTE). The commenter who noted a desire to grow these plans was motivated by a "diminishing level of engagement in collection development by subject librarians" with the "modest firm order allocation . . . not getting spent by selectors" (R1, 15,000–20,000 FTE).

Participants at institutions currently enrolled in an EBA program (n = 69) reported many variations of EBA programs, with almost half participating in at least one consortia EBA (46.4 percent) and slightly more than half reporting participating in a multipublisher EBA (50.7 percent). Regarding consortial EBA programs, one participant wrote, "In addition to local plans with locally allocated budget, we benefit from additional EBA programs through a consortium without contributing any local funds" (R1, >20,000 FTE).

Figure 3 displays responses from participants (n = 66) when asked when their institution began its first EBA. The earliest reported was 2010. Most likely, this EBA was an early experiment with an

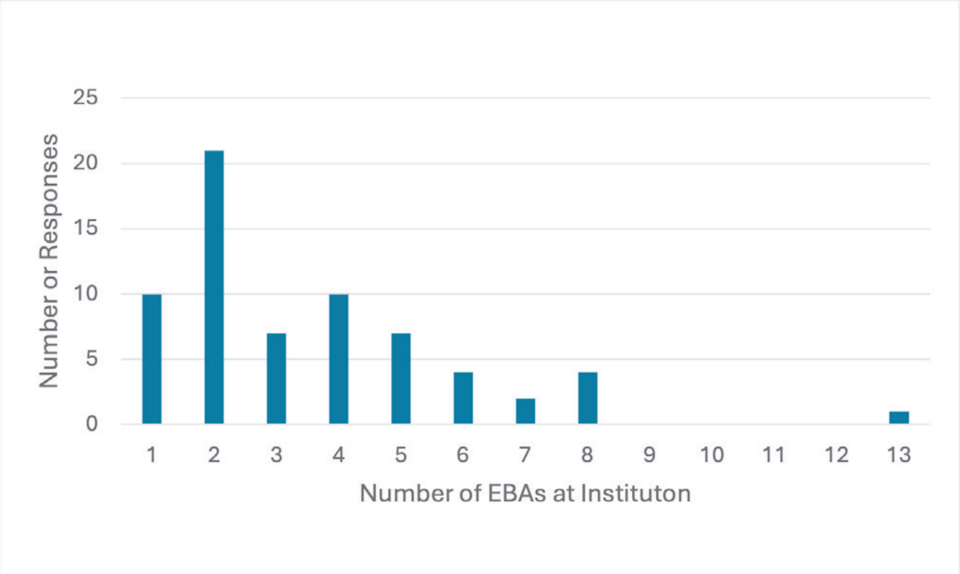

Figure 2. Number of EBA programs currently in use (at time of survey).

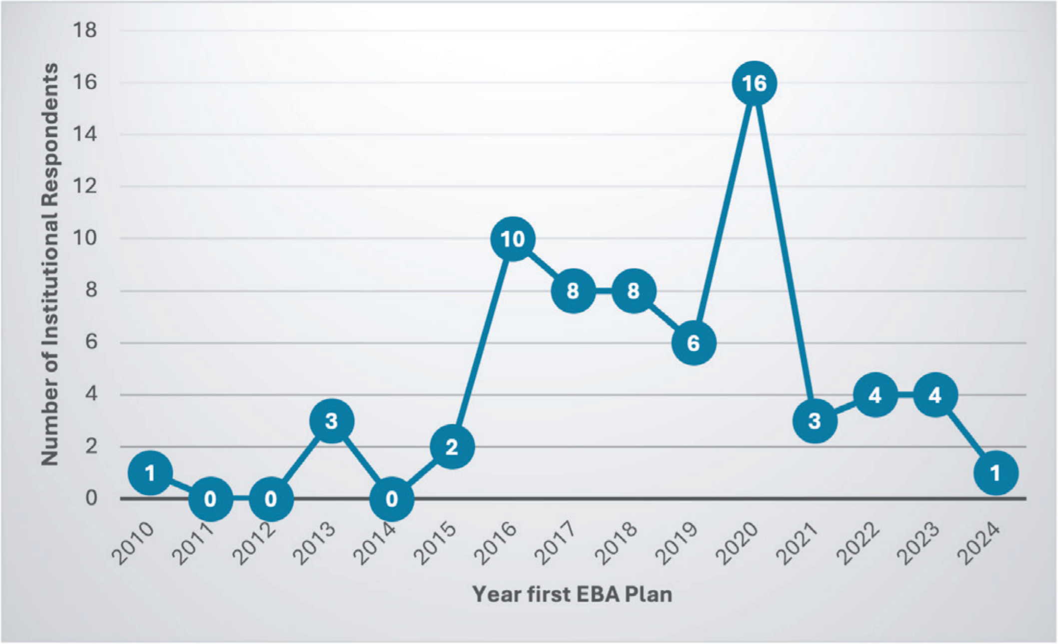

Figure 3. Date of library's first EBA.

upfront deposit and not referred to as an EBA, except in retrospect. There was a bump in 2016, with ten (15.2 percent) reporting starting their first EBA that year. The most cited year of starting a first EBA was 2020 (24.2 percent). This start date could be attributed to the pandemic, although when asked regarding motivations, the "response to closure" scored last. Full details are displayed in figure 3.

Respondents were asked about their motivations for adopting an EBA. Responses (n = 69) are represented in figure 4. A desire to "expand access" was the most common response (84.1 percent), followed by wanting to "align to user needs" (71.0 percent), and "save selection time" (50.7 percent). A desire to "increase eBook use" (23.2 percent) or "diversify collections" (24.6 percent) was reported by fewer participants, although one did comment, "EBA programs are a way to provide a diverse array of books to users to cover subject areas that might not have seen recent attention by librarians" (R1, 15,000–20,000 FTE). Only ten institutions (14.5 percent) reported starting their first EBA in "response to library closures (e.g., COVID)," despite more institutions reporting they started their first EBA in 2020, the first year of COVID-related library closures. Some did comment that COVID closures encouraged them to expand use of EBA programs. One reported, "I was initially skeptical of EBAs, and I admit that the first one we did was experimental, but the pandemic really pushed us into more of these, and I think to the good" (R1, >20,000 FTE).

EBA Plan Evaluation and Motivations

Participants who reported currently participating in an EBA were asked about their motivations for starting their initial EBA, selecting all applicable motivations from a list of choices. Participants were also asked about factors considered when evaluating whether to begin an EBA and rated them on a scale

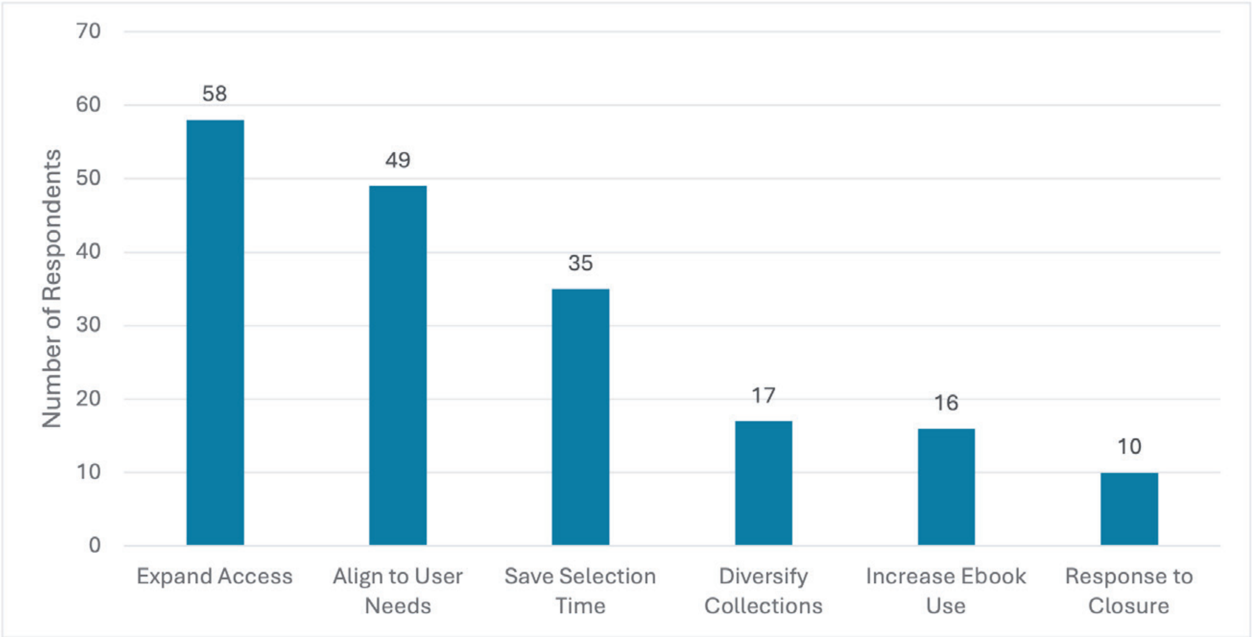

Figure 4. Motivating factors for adopting an EBA.

of 1 (not that important) to 5 (very important). Results are available in figure 5. The most important factors, with mean scores between 4 and 5, were deposit cost and alignment with the library's current collection areas. Other important factors, with average ratings between 3 and 4, included:

- copyright years included
- availability of MARC records
- filling of collection gaps
- completeness of corpus
- ease of selection process
- price of individual ebooks
- access to backfile content

Less important factors for EBA evaluation, with means between 2 and 3, were EBA management through a third-party vendor (nonpublisher direct), customization, and duplication with the print collection. Some participants reported the importance of balancing several factors related to cost, collection development, and management. As one wrote: "It is very important when I consider an EBA whether it is accessible through my knowledge base; how much it costs; and how much content (and copyright years) is included" (baccalaureate only, 1,000–5,000 FTE).

Management criteria were also emphasized by another respondent as a principal factor for evaluation:

> EBAs are most difficult to manage when the publisher does NOT work with our primary book vendor, as it is difficult for our selectors to know/remember what titles are included in the EBA, if the indicators are not in the book selection/ordering system. (R1, 15,000–20,000 FTE)

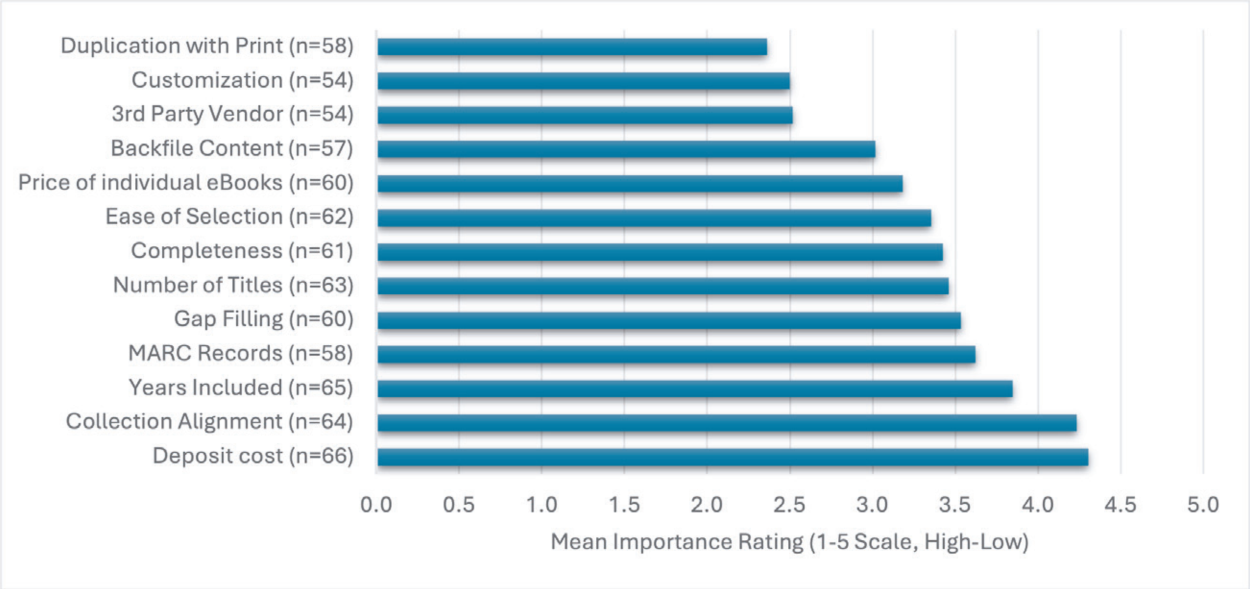

Figure 5. Factors that influence the choice of an EBA (means, 1–5 scale).

EBA Title Selection and Renewal or Discontinuation

Participants were asked about practices for selecting titles for perpetual access at the end of the EBA evaluation period. Participants (n = 68) were asked who was responsible for title selection and were allowed to choose more than one option (table 4). Most reported selection was done by a collections librarian (86.8 percent). A third reported that subject or liaison librarians were involved (35.3 percent). Fewer reported involving other technical service staff (22.1 percent) or selected other (20.6 percent). Only one reported having nobody assigned (1.5 percent).

Participants were asked about what factors they used for selecting titles and were asked to score the importance of criteria on a scale of 1 (not considered at all) to 5 (very important). These results are available in figure 6. Current year usage was the most important factor, with a mean rating of 4.5. Relatively important criteria, with mean ratings between 3 and 4, were whether titles had been used or adopted for courses, whether there was access to the title through another database, whether there was evidence for use over time, whether the titles aligned to collection needs, and how use was distributed throughout the year. The least important factors—with mean scores between 2 and 3—were CPU, subject/liaison librarian feedback, format/type of book, and duplication with print ownership.

When participants (n = 68) were asked what statistics were used to guide decision-making, almost all reported using the vendor-provided reports (95.6 percent). Some calculated CPU (38.2 percent) and fewer pulled their own COUNTER statistics (22.1 percent). Only five reported using another form of locally harvested usage data (7.4 percent). Although most respondents reported use of vendor data such as COUNTER reports in evaluating selections and/or renewals, other metrics such as historical denial (turnaway) data, more granular usage data (e.g., unique title requests, not just total title requests), and longitudinal data (e.g., data over multiple EBA periods or cycles) were identified as potentially important in overall EBA assessment. Some librarians have developed complex approaches to title selection, but cost-effectiveness and ROI remain paramount factors for overall plan assessment.

Participants who prioritized the speed and ease of the selection focused solely on use. A typical response noted, “We pretty much go by the total usage as reported by the vendor when deciding which ebooks to purchase at the end of the year.” Although saving selection time was given as a reason for many libraries to begin an EBA, several comments about title selection noted that the selection process could be difficult. One noted, “I think it was overall a good deal, but the selection process was more time consuming than I expected.” Another reported that for one of their EBA programs, “as the years go on, it is harder to find ebooks to purchase in the EBA as high use ones are already owned” (R1, >20,000 FTE).

Table 4. Responsibility for Selecting Titles at End of EBA Period

Role	No. of Respondents*
Collections librarian	59
Subject librarian/liaison librarian	24
Technical service staff	15
Other (multiple groups for review, continuing resources groups, acquisitions, graduate student for collection management, etc.)	14
No one assigned	1
Total	113

*Number of responses is greater than the number of survey respondents (n = 81) due to the ability to choose multiple responses.

Participants were asked about their decisions to renew or cancel their EBA programs (figure 7). They were asked to rate factors in these decisions on a scale of 1 (not that important) to 5 (very important). The two most important factors, with mean scores greater than 4, were the overall CPU for the EBA and whether there was a deposit increase. The proportion of titles used, difficulty in management, and whether there was a change in available content were somewhat important, with mean scores in the 3 to 4 range.

As noted earlier, a majority of participants (n = 44) reported that they had discontinued an EBA in the past. They were asked for their reasons for doing so and were allowed to select more than one option. The most common reason, as shown in figure 8, for cancellation was low overall use (63.6 percent), with budget cuts given as the second most common reason (38.6 percent). Difficulty with management (25.0 percent) and large cost increases (18.2 percent) were selected less frequently. Many participants volunteered other reasons for discontinuing the programs. Several reported changes to programs’ contents or costs, but others noted that the program had “run its course” or that they had otherwise selected the titles they wanted to collect and “a second year was not necessary.”

DISCUSSION

EBA has become a substantial and legitimate component of ebook acquisition strategy at many institutions because it balances wide access to ebook content while allowing for individual selection and

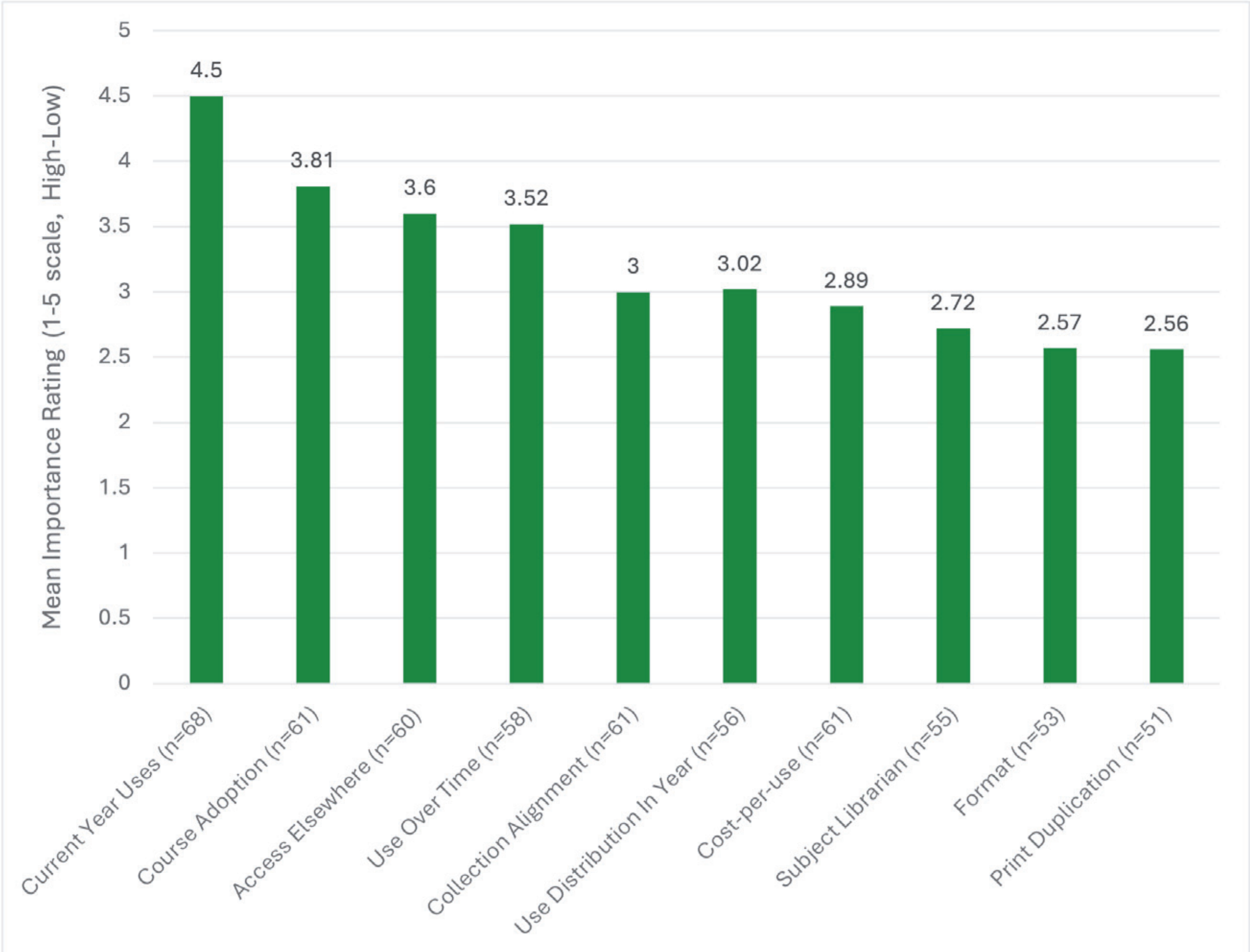

Figure 6. Factors for making end-of-term EBA selections (means, 1–5 scale).

perpetual access.[23] One respondent concluded: "As a large, diverse, research-intensive university, EBAs offer us excellent ROI as well as flexibility and purchasing based on evidence of use" (R1, >20,000 FTE). However, motivations for implementation of EBA programs alongside other models, including packages, firm orders, and demand-driven models, vary.

Although issues of content, duplication, use, access, research and curricular alignment, and data needs for evaluation all factor into adoption and evaluation of EBA programs, perennial budget considerations remain of central importance. As many respondents noted, budget control and budget predictability make EBA programs attractive and allow for greater access at a lower cost. Yet, these plans are managed as recurring subscriptions (frequently with regular market increases) that must be evaluated and assessed for their ROI and balanced against other collection needs. In several cases, EBA programs were abandoned because of being no longer fruitful as all relevant titles were chosen.

An important caveat is that our data is limited to a single point in time. The prevalence of EBA adoption we saw may be an artifact of our distribution methods and respondents. Future studies might inquire

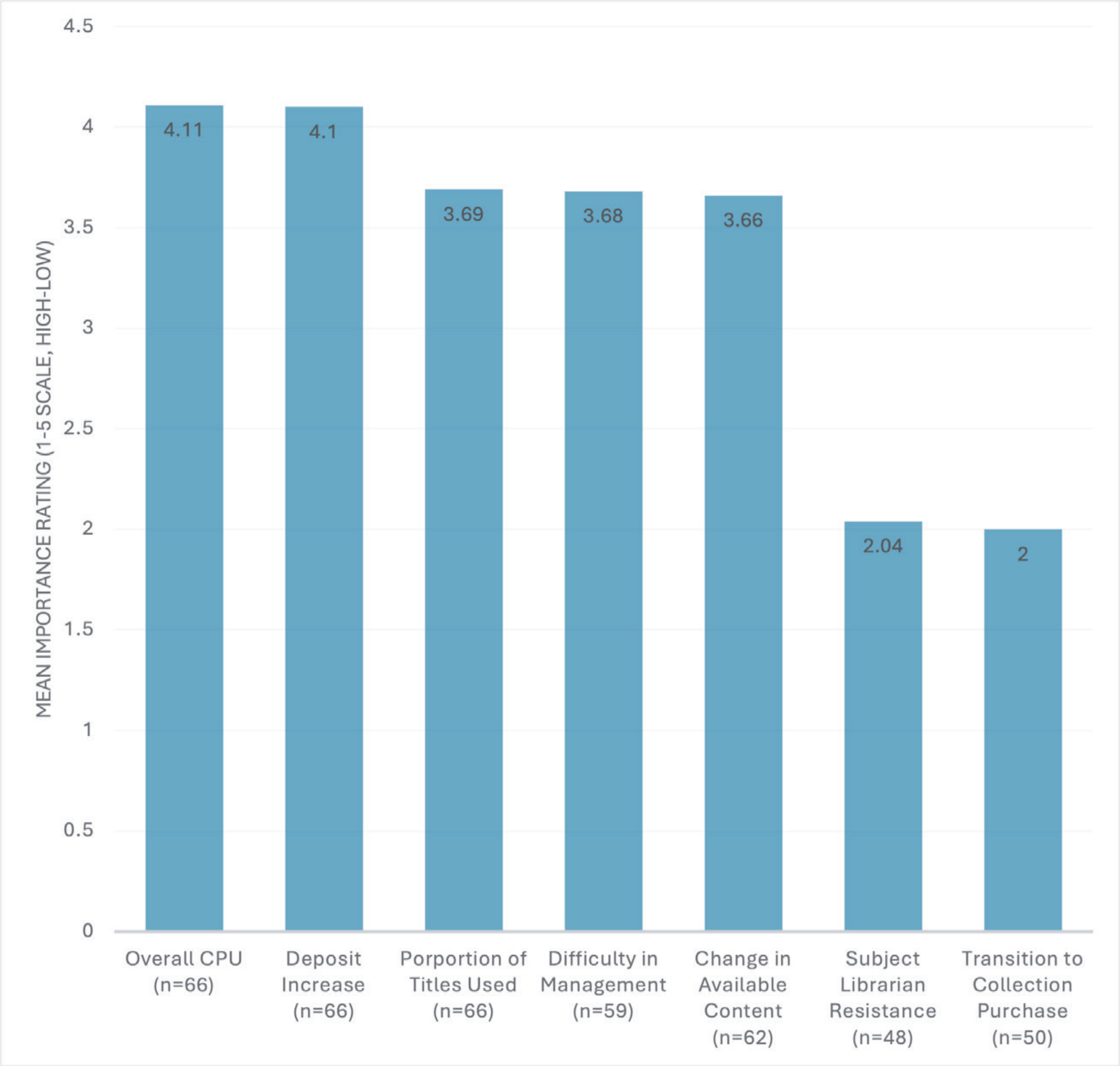

Figure 7. Factors that influence renewal of an EBA (means, 1–5 scale).

whether these proportions have significantly changed over time and expand the survey distribution further. Interestingly, packages continue to be the primary means of access to ebook content. However, the survey did not ask for a distinction between purchased or subscribed. As one respondent commented:

> EBA plans with specific publishers as both an individual institution and a member of a consortium have been successful from several positions: 1. predictability of cost; 2. entire ebook frontlists from large, subject-diverse publishers; 3. no DRM; 4. helping selectors free their time to focus on selections from smaller/more diverse publishers. (R1, >20,000 FTE)

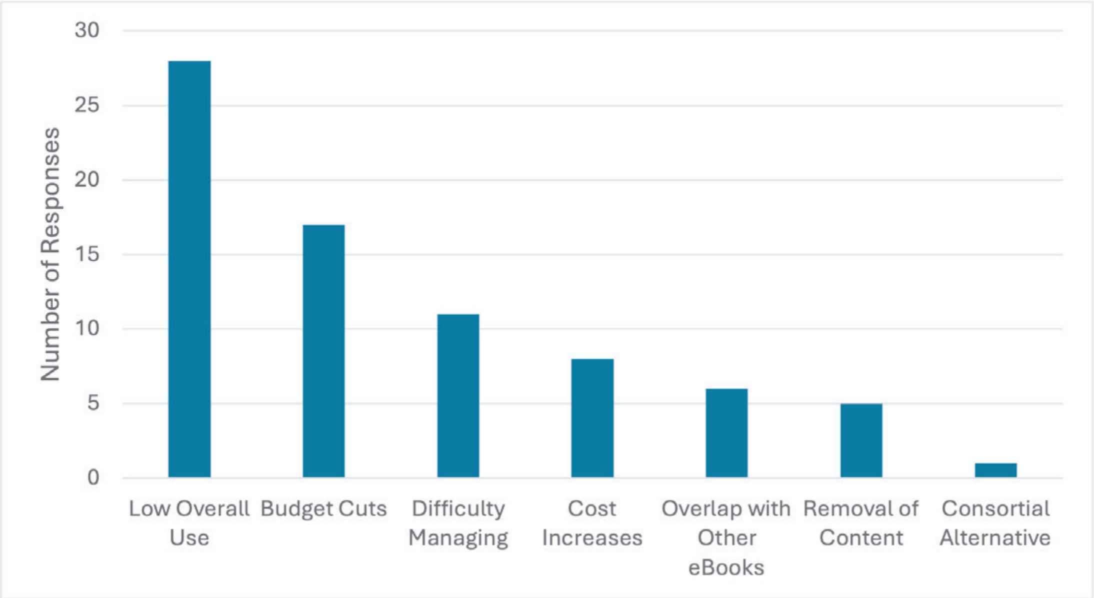

Figure 8. Reasons for discontinuing an EBA.

Another respondent emphasized that DDA programs have run their course:

> We have over the past two years expanded our EBA plans to new vendors and cancelled some due to cost increases and low usage. Overall EBAs are a better form of collection tool, than say DDAs because they provide more control over the spend. I do wish University Presses would be get [sic] more onboard with providing new content through EBAs. (R1, >20,000 FTE)

Although seeming to supplant the dominance of DDA, it appears that individual libraries may struggle with workflows and assessment as part of the EBA life cycle. As one respondent noted:

> Overall, we value just-in-time collecting like EBA, and are trying to do more of it, but due to the staffing challenges and vendor-driven aspects of these particular plans, our approach is not as evidence-based or efficient as it probably could be. (R2, 10,000–15,000 FTE)

Another noted that DDA had been preferred over EBA due to efficiency issues:

> We have generally preferred DDA plans to EBA plans because of the challenges in reviewing title and usage lists, particularly if they are bunched up at the end of the fiscal year. As we've gotten better at it (including streaming media EBA), this has lessened but is still a bandwidth challenge. (R2, 5,000–10,000 FTE)

With many libraries balancing multiple plans and managing multiple data reports and workflows for EBA programs, capacity and infrastructure become central issues (one respondent referred to these considerations as "bandwidth" issues). Management of EBA programs can be challenging and time-consuming (including title selection, duplication, records management). For example, initial EBA setups have multiple workflow decision nodes and multiple stakeholders and decision-makers.

Considerations include budget and cost, content and overlap, process and source of record retrieval (initial and ongoing content loads), and end-of-term purchases.

More specifically, the following emerged as key issues:

- Challenges for staff (e.g., technical services staff) due to variations in individual plans (publication dates included, MARC records delivery, term dates), selection deadlines, etc., all require local best practices and discussion.
- Adjustments to existing programs and assessment of EBA programs (e.g., content changes, ROI, adjustments to deposit) take time to perform.
- Renewal periods could be extended or terms extended to allow for more deliberate and careful selection of perpetual access titles and content adjustments, along with more standardized usage reporting.

Both our literature review and our survey found many libraries bringing subject librarians back into the ebook selection process with EBA after their exclusion from DDA programs. In many other cases, however, central collections staff handle selections.

> As noted, evidence-based acquisitions (EBA) plans work similarly to DDA plans, but the titles are vetted by the subject librarian before determining whether the eBook accessed via short-term loan for the user should become a piece of the permanent collection. If DDA causes loss of identity for subject librarians as "selector," EBA increases the selection value of the subject librarian . . . Subject librarians must be able to discern return on investment to ensure their budget allocation is used judiciously.[24]

Our results suggest that individual libraries and consortia should consider best practices around EBA programs, especially when managing multiple plans. Libraries should outline processes, workflows, and roles and responsibilities of staff across the EBA life cycle.[25] In addition, clear criteria for the selection of titles and defined roles and responsibilities in management and selection would benefit library staff. One such model for end-of-term selection is by Hellman and Jacobs; the authors outline criteria and a decision tree for such decisions, which includes collection managers and subject teams.[26] There could be a substantial opportunity for joint, collective publisher–library initiatives to develop standards, in line with the NISO DDA standards.

Birchhall, Devarenne, and Wegmann developed a set of prioritized data points for the annual comprehensive evaluation of their EBA that goes beyond traditional simple CPU or overlap with print and electronic holdings (both locally and for consortia).[27] They used newer variables such as curricular importance, CPU book (not just CPU for the collection), ILL availability, and consortial availability, and prioritized these against traditional measures so that their two plans could be assessed in concert with each other.[28] In support of this approach, several respondents argued that better technical support and more involved usage reports would certainly be welcome (e.g., more longitudinal data to assess long-term use, better duplication and deletion control, extended terms, fixed increases). Vendors and publishers should take these data points into consideration when providing data for selection.

Conclusions and Future Research

This study focused on uptake of EBA programs by (a subset of) libraries in isolation. Further research—both qualitative and quantitative—at a wider scale of participation may provide further insights and different patterns of EBA adoption and evaluation. In addition, our research did not delve into patterns of EBA adoption by library size and/or research level or classification (although we did receive a good number of responses across size and research level). Future investigations could potentially involve publisher aggregate data on EBA programs and trends to compare against librarian self-reporting of EBA adoption.

Considering the normalization of EBA as an ebook acquisitions strategy, another avenue of possible investigation is the effect of EBA on overall collection development. Usage patterns may be analyzed to investigate patron interests and new areas of concentration on campus. In addition, the increased popularity of EBA may have implications for resource-sharing. With a combination of candidate or access-only records and purchased records, there may be more complexity in fulfilling user requests across libraries. Learning how early adopters of EBA have developed long-term approaches to selection and renewal decisions would also be of interest. For instance, multiple respondents mentioned EBA programs losing value over time as the most used items are selected out. Is there an optimal length of time for subscriptions or length of pause before renewing to a refreshed corpus?

Vendor and publisher perspectives could be an area of future research as well. Best practices for managing EBA programs, reporting usage, and calculating optimal commitments as library budgets shrink have yet to be determined. The long-term profitability of EBA programs is also unknown.

Librarians have had to balance ebook access (and demand) with ownership in the face of constrained budgets. EBA has served as a model to mitigate some of these concerns, but it can be complicated due to the multiple issues of budget, selection, records management, evaluation, and stability. With that said, EBA could potentially be a more complex and sophisticated collection development tool than it currently is. Collaboration among publishers, vendors, and librarians should continue to develop to further facilitate management and effective assessment.

CRediT Author Contribution Statement

Christopher A. Palazzolo: Conceptualization, Methodology, Formal Analysis, Investigation, Writing – Original Draft, Writing – Review & Editing, and Visualization.

William Jacobs: Conceptualization, Methodology, Investigation, Writing – Original Draft, and Writing – Review & Editing.

Matthew J. Jabaily: Methodology, Formal Analysis, Writing – Original Draft, Writing – Review & Editing, and Visualization.

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