

# Recommendations of the Steering Committee's Digital Collections Workgroup

## April 2017

The Digital Collections Workgroup met on March 30, 2017 to consider a list of topics and to create a recommendation for the 2018 buying pool.

The identified topics that the Workgroup considered include:

- Non-English Language Materials
- Adult Literacy Materials
- 2018 Buying Pool Amount
- New Vendor Criteria & Consideration of Other Vendors
- Plan for Dealing with Holds and Advantage Collections' Role

The 2017 patron and library survey data summaries, as well as a new vendor research document and an Advantage and shared collection development process document is included with this document. Usage statistics, a collection review and other information supplied to the Workgroup are available [here](#).

### Non-English Language Materials & Adult Literacy Materials

The workgroup reviewed and discussed the [Collection Review](#) spreadsheet. Audiobooks had a 27% increase in usage from 2015 to 2016 even though less money was spent on them in 2016. Conversely, ebooks showed only a 2.5% increase from 2015 to 2016, though significantly more money was spent toward them in 2016. This might be attributed to the fact that all audiobooks have a fixed checkout period of 14 days whereas ebooks can have up to a 21-day checkout period. In addition, more copies than unique titles were purchased of audiobooks. Although there are less titles to choose from, there are more copies available of each audiobook title. It should also be noted that there is a greater price range for ebooks than audiobooks, which could mean more unique titles are purchased of ebooks than audiobooks, but fewer copies of each unique title are purchased as well. Specific areas that were identified to review included non-English language materials and adult literacy materials.

### Non-English Language Materials

The statistics for the Spanish language collections in the Collection Review covered six months from June 2016 to December 2016 and didn't indicate high usage of either collection (adult or children's). To further investigate adding additional languages, the Workgroup reached out to organizations in the Spanish language community as well as added questions to the surveys to gauge interest in non-English language materials.

Key results from the library survey regarding non-English language materials are following:

- If titles were available in languages other than English, 66% of respondents said patrons would check out materials in Spanish.
- 33% of respondents think patrons would only check out titles in English, but 11% of respondents would check out Simplified or Traditional Chinese.
- 16 respondents offered other suggestions including French, Arabic, Somali, and Hmong.

Key results from the patron survey regarding non-English language materials are following:

- Respondents overwhelming only checked out titles in English (91%)
- 6% of respondents indicated that they would check out titles in Spanish, followed by titles in German (2%).
- Respondents that selected Other languages typically preferred books in French (2%).

The Workgroup discussed the results of the library and patron survey. Although there was a clear indication that usage of non-English language was low, the group felt it was important to note that the patron survey was not available in Spanish or any other non-English language.

Marketing of the Spanish language collection was discussed. It was felt that there was not enough promotion of the collection in 2016 and that the adult popular materials in Spanish should still be purchased to give the collection a chance to catch on.

**RECOMMENDATION: The Workgroup does not recommend purchasing materials in languages other than Spanish and English. \$5000 should be put toward adult popular Spanish materials. Additional measures should be taken to promote and market the collections. The Workgroup recommends the following actions:**

- **Request OverDrive generate a list of top circulating Spanish language titles to purchase.**
- **Create a featured collection on the website.**
- **Create a marketing plan for Spanish materials.**
- **Run mid-year usage statistics to see how promotion should be changed.**

### **Adult Literacy Materials**

Adult literacy materials was a topic for review suggested by the Digital Library Steering Committee. The Workgroup decided to survey literacy organizations about their specific needs. Wisconsin Literacy, Inc. was contacted and is willing to assist the Workgroup in reaching out to the many adult literacy organizations around the state in order to determine the need and interest for adult literacy materials in Overdrive.

Including adult literacy materials in the collection would be to include items that are currently outside of the scope of collection. Because of this, the group decided to postpone this discussion until the scope has been reexamined.

**RECOMMENDATION: At this time, do not include adult literacy materials as they are outside of the current scope of the collection.**

### [New Vendor Criteria & Consideration of Other Vendors](#)

The 2012 New Vendor Criteria created by the former WPLC Vendor Committee was examined and updated with additional criteria based on results from the library and patron survey.

### **New WPLC Vendor Criteria**

#### **1. Ease of use**

- Product should be fully developed with a high ease of use for patrons and staff.
- User ease, such as one click downloading is important.

## 2. The “Kindle” Factor

- A large proportion of current downloads from the OverDrive E-Book collection are Kindle editions.
- Products need to offer Kindle compatibility or some extraordinarily valuable feature that compensates for lack of Kindle compatibility.

## 3. Use Statistics

- Availability of use statistics at the level of the individual library level.
- Availability of use statistics Library ID.
- Availability of use statistics for specified periods of time.
- Availability of use statistics by format.

## 4. User Authentication

- Must be able to authenticate users in real time from their library card ID numbers.

## 5. Collection Development

- In addition to the features the current vendor offers, any new feature is of interest such as simultaneous use, multi-format (periodicals, graphic novels, etc.).
- Transfer of titles. If vendor claims that they can transfer titles from one vendor to another, detailed information is needed to consider the new vendor. Questions to ask: Does the new vendor do the transfer? Are there restrictions that need to be considered because of publishers?
- Does the product provide exclusive access (especially if it is multi-user access) to certain publishers, authors or titles?
- What is the holds model?

## 6. Cost

- Cost and perceived value to libraries and digital media users is to be considered.
- Current cost per partner is also to be considered.
- Platform fee and annual maintenance fee?

## 7. Additional Criteria

- **Simultaneous Use** -The ability for multi-patrons to access titles should be investigated and considered.
- **Mobile App** – Availability of a mobile app on multiple mobile devices.
- **Storing Passwords** – The ability for the software to store patron ID and passwords in both the web version and App.
- **3<sup>rd</sup> Party Software** – Does the vendor require a separate, 3<sup>rd</sup> party software?

In addition, the Workgroup included alternate platform and vendor questions in the library survey to ascertain the Wisconsin library community's interest in pursuing a new platform.

Key results from the library survey about alternate platforms are following:

- 36% of respondents would not encourage the WPLC to research a new platform for Wisconsin's Digital Library, 25% of respondents would encourage it, and 39% of respondents were unsure.
- Of respondents who would encourage WPLC to research a new platform and those that were unsure, 76% would like to know if there is an alternative platform that would reduce patrons' wait time to get the titles they want. 58% would like to know if there is a platform with a mobile app that is easier for patrons to use, and 54% would like to know if there is a platform with a web interface that is easier for patrons to use.
- Of respondents who would encourage the WPLC to research a new platform, and of those that weren't sure, 70% suggested 3M Library Cloud, 55% of respondents suggested Baker & Taylor Axis 360, 45% suggested BiblioBoard. Among other suggestions provided by respondents, the most common was Hoopla (7%).

Using the revised new vendor criteria, research on four new vendors was conducted. The vendors contacted were the top four listed in the library survey results. The Workgroup reviewed the research provided and the pros and cons list to determine if a more extensive process should be undertaken at this time to consider other vendors and platforms. The information gathered is included in the *Initial Vendor Research 2017* document.

**RECOMMENDATION: One of the Workgroup's goals for this year is to investigate ways to reduce holds. After reviewing the research and other platforms, the group felt that no other vendor offers an affordable model that will solve this main issue. It is believed that it is a better investment currently for WPLC to do more advocacy with the publishers. The group recommends not pursuing a new vendor but to keep apprised of the changes these vendors offer.**

### Plan for Dealing with Holds and Advantage Collections' Role

A focus for the Workgroup this year is to think about ways to better share communications between consortium and Advantage selectors as well as possibly considering ways to rethink the areas in which selectors select. This work supports one of the recommendations from this group last year, which was to improve the communication and best practices between Advantage and consortium selectors, so it is an appropriate role for this Workgroup to assist with further developing this plan.

The group took into consideration the potential modification of the formula for the buying pool amount above \$1,000,000 that the current Formula Workgroup is recommending to the Board. Knowing that money could be re-allocated to Advantage accounts to purchase holds, the group felt there was even greater importance of identifying and establishing best practices between Advantage and consortium selectors.

Several questions were identified about the relationship between the consortium and Advantage accounts. To move forward with coordinating communication between these two bodies, the Workgroup reviewed the goals outlined in the *WPLC Advantage and Shared Collection Development Process* document and identified additional questions and pieces of evidence to acquire.

**RECOMMENDATION: The Workgroup needs additional time to address and research the identified questions to create a best practices plan for consortium and Advantage selectors. The Workgroup recommends once this research is complete and a plan is created, that the two bodies implement the**

**plan to address the current holds issue and to promote better communication and collaboration among the two bodies.**

### 2018 Buying Pool Amount

From the collection review and research that the Workgroup studied this year, it is clear that the focus needs to be on the scope of the collection and the relationship of Advantage accounts and the consortium. The workgroup has agreed to extend their time commitment this year to focus more energy on analyzing the current collection, its usage and how Advantage accounts can positively contribute to reducing the high holds ratio.

**RECOMMENDATION: While many expressed a preference to increase the buying pool to add to the shared collection, all recognized the challenges of increasing the buying pool in the current political climate. Therefore, the Workgroup recommends that the buying pool budget remain at \$1,150,000 for 2018. In addition, the Workgroup will continue work to make recommendations on how Advantage accounts can contribute and achieve a better focus for the collection.**

## Initial Vendor Research & Criteria 2017

One of the identified initiatives for the Digital Collection Development Workgroup was to research and identify potential new vendors for the WPLC and to make a recommendation of action to the WPLC Steering Committee regarding vendors. The Workgroup added specific questions to the 2017 WPLC survey to librarians regarding current and potential platform features.

From the 2017 WPLC Library Survey, 24.66% of respondents responded *yes* to the question, “Would you encourage the WPLC to research a new platform for Wisconsin's Digital Library?” 36.30% said *no*, and 39.04% were *unsure*.

Of those who responded *yes*:

- 76.19% of the respondents want to know if there is an alternative that would reduce patrons' wait time to get the titles they want.
- 53.57% of the respondents want to know if there is a platform with a web interface that is easier for patrons to use.
- 58.33% of the respondents want to know if there is a platform with a mobile app that is easier for patrons to use.
- In addition, respondents want a platform that doesn't cause download issues for patrons when updates happen, has a better “listen now”/ streaming option, and saves passwords.

Respondents were also asked what platform they would encourage the WPLC to research. The top four vendors were Baker & Taylor, BiblioBoard, bibliotheca & 3M, and Hoopla. Using the following criteria adapted from the former WPLC Vendor Selection Committee, the four identified vendor platforms were contacted for initial information.

### **New WPLC Vendor Criteria**

#### **1. Ease of use**

- Product should be fully developed with a high ease of use for patrons and staff.
- User ease, such as one click downloading is important.

#### **2. The “Kindle” Factor**

- A large proportion of current downloads from the OverDrive E-Book collection are Kindle editions.
- Products need to offer Kindle compatibility or some extraordinarily valuable feature that compensates for lack of Kindle compatibility.

#### **3. Use Statistics**

- Availability of use statistics at the level of the individual library level.
- Availability of use statistics Library ID.
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#### 4. User Authentication

- Must be able to authenticate users in real time from their library card ID numbers.

#### 5. Collection Development

- In addition to the features the current vendor offers, any new feature is of interest such as simultaneous use, multi-format (periodicals, graphic novels, etc.).
- Transfer of titles. If vendor claims that they can transfer titles from one vendor to another, detailed information is needed to consider the new vendor. Questions to ask: Does the new vendor do the transfer? Are there restrictions that need to be considered because of publishers?
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The identified vendors were provided with the criteria for new WPLC vendors. The following are their responses to the criteria.

## Baker & Taylor

### 1. Ease of use

Axis 360 is a robust platform serving the needs of many of the largest libraries in the US, including San Francisco Public Library, San Jose Public Library, Queens Public Library, Johnson County Public Library, Houston Public Library and Miami-Dade Public Library. Axis 360 also provides statewide eContent lending to eRead Illinois with the RAILS consortium and the Commonwealth eBook Collection for the State of Massachusetts.

This February, Jefferson County Public Library in Colorado made the decision to move their entire digital collections from OverDrive and Cloud Library to Axis360 after doing a comprehensive digital vendor review, including a focus group evaluation that ranked Axis 360 highest for overall user-experience. The Axis 360 app offers patrons the streamlined functionality they need to discover and enjoy digital content instantaneously, no matter where they are, in three steps or less! With the all-in-one Axis 360 app, users can browse, check out and read or listen to eBooks and audiobooks using their Apple and Android devices, including Kindle Fire tablets.

The Axis 360 app is rated at 4.5 stars on the Apple App Store, and includes:

- One-time login with your library ID
- In-app eBook reader and digital audiobook player
- No Adobe ID required
- Instant audiobook playback – no waiting for downloads

Axis360 eBooks can now also be read within any current web-browser both on and offline, eliminating the need for patrons to download an app to view content and making Axis360 content available on any device with a web browser.

### 2. The “Kindle” Factor

It is important to consider that only a small percentage of downloads of Kindle-format are for use on devices that are able to support only the Amazon format. Checkouts are often consumed on iPhones, iPads, Android tablets, Kindle Fire devices, PCs and Macintosh computers running the Kindle app. We have been told by library customers that up to 90% of Kindle checkouts are actually being read on devices that can also be used to read eBooks from Axis 360. The Axis360 app is compatible with Kindle Fire tablets and is available for direct download to those devices from the Kindle app store.

Axis 360 content can also be easily accessed for on or offline reading on any device with a web-browser.

In addition, Axis 360 also provides the ability to read eBooks on elnk devices that utilize standardized formats and DRM approved by the publishing industry and library governing organizations.

Several prominent library systems that have moved off of OverDrive to Axis360, and have therefore eliminated library support for Kindle elnk devices, have done so successfully by effectively managing the communication to patrons during the transition. By clearly indicating the library’s values and the benefits to the library from Axis 360 (ease of use, privacy protection, reduced cost, and community sharing) that offset the loss of the Kindle elnk functionality these libraries have been able to migrate with very little negative patron feedback. In fact, the most recent customers to consolidate on Axis 360

have seen their digital circulation exceed prior highs on the OverDrive platform within a few months of launch.

### 3. Use Statistics

Baker & Taylor has developed highly sophisticated technology tools to support consortia, and Axis 360 is the digital platform being used in Illinois for the RAILS' eRead Illinois program and in Massachusetts for the Commonwealth eBook Project; both are statewide multi-type library programs. In response, to the needs of these organizations, Axis 360 offers a wide variety of reports for consortia including the ability to get usage statistics at both the consortium and the individual library level, the ability to get statistics for specified periods of time and the ability get usage statistics by format. The consortium can also run circulation reports, circulation summary reports, "unbound members" circulation summary reports, scoped titles reports, and active checkout reports. The complete list of self-serve reports available to both individual libraries and the consortium is below.

- Inventory List Report
- Inventory List Summary Report
- Circulation List Report
- Circulation List Summary Report
- Hold Report
- Hold Summary Report
- Inventory Circulation by Month
- Top 10 Circulating Subjects
- User Review Report
- New Users By Month
- Total Users By Month
- New Users By Month Graph
- Total Users By Month Graph
- Adoption By Month
- Adoption By Month Graph
- Active Users Report
- Total Active Users Graph

Because of privacy concerns, the ability get usage statistics by Patron ID is not a self-serve report, but Baker & Taylor does deliver reports by barcode on a regularly scheduled basis if required. We do have libraries requesting this data to feed into analytics tools. If the library's ILS vendor has fully utilized the Axis 360 API's, this usage information should also be available through the library's ILS.

In addition, all Axis 360 libraries are assigned a dedicated *Digital Relationship Manager* who will regularly analyze both individual library and consortium activity using analytics tools available internally at Baker & Taylor. The Relationship Manager will then schedule meetings with the appropriate library staff to review the data and recommend action steps to improve the impact of the library's digital collections as necessary.

Other features for designed for consortia include:

- Mixed library sharing (public, K12, academic, special)
- Multiple ILS systems in sharing group
- Independent member authentication
- Collaborative collection development
- Unbound (individual member library) collections for local-access content
- Seamless shared and local collection access
- Donation from local to shared use
- Content scoping for K12 schools
- Member and consortium level reporting

#### **4. User Authentication**

Axis360 is able to authenticate users in real time from their library ID card numbers and offers API integration with the major ILS and discovery vendor platforms in the US public library market. So, the patron can seamlessly discover and check out digital content from within the library's catalog.

Patrons using Axis360 do not have to download any additional software, such as an Adobe certificate; and those authenticated through a SIP process do not need to create a separate Axis360 account. They simply enter their Library ID and pin, and they can discover, checkout and read.

Users will only be prompted to provide an email address if they place a hold on a title so they can receive notification when their title becomes available. Even then, supplying an email is optional, and Baker & Taylor does not use the address to contact patrons for any other reason. This helps ensure patron privacy is preserved. For patrons using the Axis360 app, sign in is only required on first launching the app. Users will not be asked for login details a second time unless they logout of the app or delete it from their device.

#### **5. Collection Development**

##### **Content Licensing**

Axis 360 hosts over 77,000 digital audiobooks and more than 1.3 million eBooks. For the most part, content availability and licensing options are the same for the three major library aggregators in the U.S. Occasionally, because B&T has long term relationships with many publishers, we will learn of one that is solely on our platform (Baen Books for instance); but these are not exclusive arrangements. In general, publishers are opting to be in all the library channels that support their preferred licensing model and adequately protect their content from piracy.

However, at Baker & Taylor we are currently developing a technology infrastructure that will expand libraries' choices when it comes to digital acquisitions in ways we believe will be unique in the market place. Later this year, libraries using Axis 360 will be able to license content on a "pay per-use" basis when the publisher permits. This will enable libraries to affordably deepen their backlist and midlist offerings (with no holds or turn-aways) on the same discovery and reading platform that hosts their current bestsellers. In addition, we will begin beta-testing a patron driven acquisition program that allows a library to designate titles to be included in its repository with the actual purchase being triggered by the first patron checkout, eliminating the guesswork that goes into determining which titles to purchase without hindering the patron experience by requiring an intermediary "recommend to buy" step.

##### **Collection Development Tools**

Baker & Taylor's Title Source 360 is a revolutionary way to order multiple product formats from one trusted source. Through the latest innovative technology, Title Source 360 provides users with fast, accurate and personalized search results, and makes ordering easier than ever. Find the products you need and order them quickly and easily with a streamlined checkout process.

Baker & Taylor's Title Source is the most extensive database of bibliographic acquisitions information for U.S. publications. This database includes book, e-book, spoken word audio, DVD, and music CD titles. Each record gives current print status (i.e. Not-Yet-Published, Out-of-Print), in-stock availability, and latest list price. Title information is updated daily.

### Title Source 360 Benefits:

- Largest database of book titles and media products
- Fast, customized search results based on prior searches or user profile
- Intuitive interface
- Inventory view and title searching within cart
- Product release calendar
- Special offers and promotions
- Live customer support
- Customized profiles
- Streamlined order management
- Simple batch entry upload and ordering process

The Title Source 360 database contains detailed, comprehensive, up-to-date information on over 8 million book titles, 1.3 million eBook titles, 77,000 digital audiobook titles, 265,000 DVD titles, and 780,000 music titles. Data elements also include: 45 key search indices (including LC and Dewey classes), eleven filter criteria (including license model for digital content, stock status, publication date, binding, format, and grade level), and duplicate checking between orders and selection carts.

### Integrated Print and Digital Selection

Using TS360 for digital title selection can streamline the library's workflow, allowing the library staff to make selections of all formats of a title – print and digital - at one time. TS360 also offers a unique utility for selection staff: **Print to Digital Cart Conversion**. After selecting print editions for new titles, the selector can convert their cart from physical to digital with the touch of a button. The print cart is transformed into available eBook and digital audiobook formats for those titles so that orders for these editions can be placed at the same time. TS360 brings together the metadata for all formats in a single view and clearly indicates if the library has previously placed orders for any of them enabling the selector to make well informed choices at the point of order.

All of the TS360 features the library uses when ordering physical materials from Baker & Taylor are available for digital ordering, including notification carts, grids, cart sharing and transfer, and varying user permissions. In addition, the library can opt to get notifications of expiring titles and holds alerts within TS360.

Baker & Taylor offers libraries a choice of online ordering options to suit the library's acquisitions workflows. Libraries may select and order with full duplication control via Title Source 360, or they may select in TS360 and order with the library's ILS system via EDI. **Ordering via EDI from the library's system will provide seamless creation of on-order records, electronic ordering, acknowledgments and invoicing, eliminating keying and providing accurate encumbrances for participating libraries.**

Libraries opting to merge their workflows for print and digital content selection realize savings in both staff resources and improved digital collections, as librarians can easily make better informed choices with alternate format history at hand.

### Customized Selection Lists

Our comprehensive service package includes collection development and selection assistance for your library. Programs simplify selection workflows by delivering new-title notifications directly to the Title Source user logins of library acquisitions staff. Collection development librarians at Baker & Taylor are

available to craft recommended title lists for all subjects, audiences and genres on demand (recent release and retrospective titles) and may include specific title listing requests. Selectors at the library are able to customize, save, share and combine selection lists, or perform title-by-title discovery, cart building and ordering.

#### FirstLook Lists

On a monthly schedule, selection profiles are executed and can be sent to Title Source user IDs at your libraries. These profiles are constructed based on the following selection criteria: citation in major review media such as Booklist, LJ, Horn Book, Kirkus, SLJ, PW, and/or Baker & Taylor programs such as Booking Ahead, Forecast, and/or Growing Minds, and titles from key publishers.

#### Other List Services

The library will also receive Quick Axis weekly email alerts about publisher discount promotions and our Fast Facts newsletter about trending titles receiving a lot of a media attention. Baker & Taylor maintains over 500 Awards and Honors lists, 17 Bestsellers lists, 100 Children's and Teen's lists and 31 General Adult lists, as well as over a dozen genre-specific publications that can be viewed as carts in TS360.

#### Profiled Automatic Ordering

Libraries may choose to set up Automatically Yours profiles (automatic delivery upon publication, based upon selected authors or series) for digital content, ensuring the library's collection always has the most popular titles as soon as they become available. In Popular Adult Fiction, choose from more than 200 authors in popular genres such as Romance, Thriller, Horror and Historical Fiction. In Adult Nonfiction, choose from more than 300 Travel, Education, Reference, Study Aid, Test Prep and other series. In Children's and Teens choose from more than 250 series, and in Digital Spoken Word choose from more than 160 popular authors.

Libraries may establish automatic fulfillment or notification plans for any of the authors or series in the categories below:

#### Adult E-Series

300+ Popular Romance, Travel, Education, Reference, Study Aid and other series  
eg. Harlequin; Fodor's, Insight; DK Travel, Lonely Planet; JK Lasser's, Ernst & Young Tax Guides...

#### Children's and Teen E-Series

250+ Popular Fiction and Non-Fiction series

#### Adult Popular E-Authors

200+ Popular Authors

#### Digital Spoken Word Popular Authors

160+ Popular Authors

#### **Content Transfer**

Baker & Taylor successfully migrates existing eBook and digital audiobook content from other aggregator's platforms to the Axis360 platform for libraries large and small on an ongoing basis. Some of the largest libraries in the country where successful migrations and transition communications plans for patrons have been completed include Queens Public Library, Marion County Library and Miami-Dade Public Library.

The process for the library is simple:

1. In consultation with B&T, determine the transition date for each platform
2. Sign letter authorizing to B&T to negotiate content transfer with publishers on the library's behalf
3. Obtain inventory reports from current vendors with license type, circulation history and holds data
4. Arrange for termination of service with current providers on determined date
5. Provide confirmation that the prior service(s) have been terminated

Baker & Taylor manages all the rest, including the activation of metered title licenses with remaining circulations or time remaining until expiration. Many libraries that have completed this process with B&T have seen digital circulation on Axis 360 rapidly rise and ultimately exceed previous digital circulation levels, sometimes within as little as 3 months of transition. We attribute this success to the expertise and support B&T staff provides to libraries as they transition to Axis360, enabling the library to generate excitement about the new platform and minimize disruption for digital patrons. A history of success working with large migrations differentiates B&T's digital services from others in the marketplace

#### **Exclusive Access**

Baker & Taylor has successfully negotiated consortium purchase and sharing of e-content on behalf of its Axis 360 consortia customers with Hachette and Macmillan. We understand that some consortia using other vendors have had to restrict purchasing of materials from these publishers to be for individual library use only. Baker & Taylor will negotiate with the publishers to allow shared-use of content for WiLS if Axis 360 is chosen as a vendor.

#### **6. Cost**

##### **Cost and Value**

In order to provide a definitive cost for Axis 360 services that aligns with the WPLC's vision for digital services, Baker & Taylor would like to have additional information such as the number of libraries that would be participating and the estimated number of transactions that would be supported on an annual basis.

Baker & Taylor does charge an annual Hosting, Access and Services fee, but does not charge for any setup or other maintenance or upgrade fees. In general, annual hosting charges for Axis 360 are far below the annual costs of competitor platforms.

#### **7. Additional Criteria**

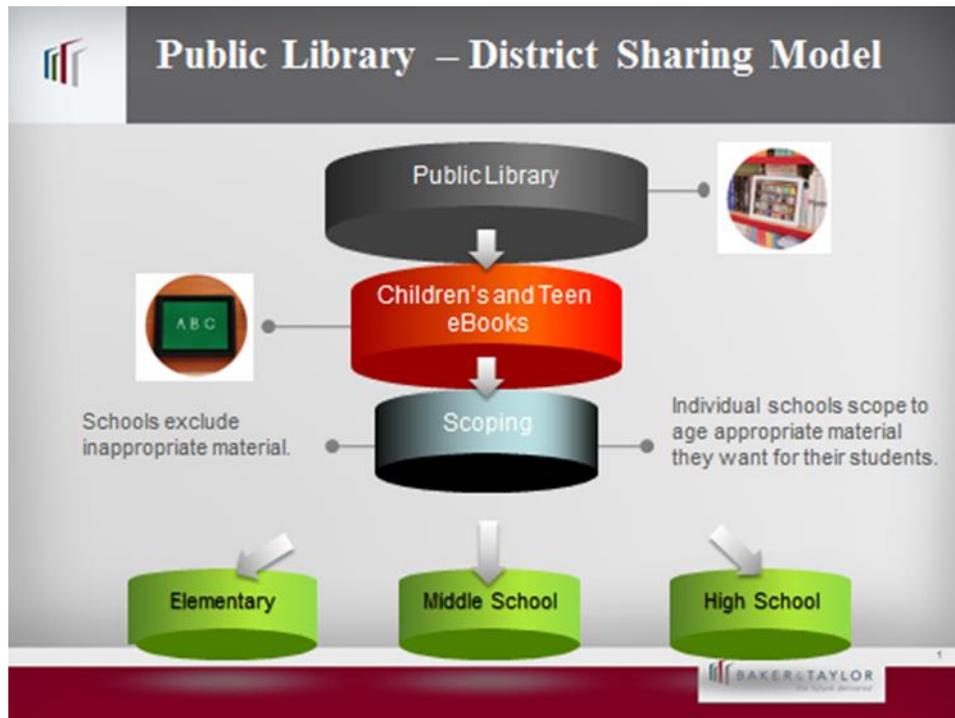
##### **Simultaneous Use**

The Axis 360 platform can support simultaneous use content. However, there is little available with this license type in the public library marketplace. Baker & Taylor is able to negotiate with publishers for temporary simultaneous access for community reads programs and may be able to extend these efforts further for simultaneous multi-user access to content if library budgets support it.

We can help Wisconsin communities take better advantage of the multi-user licensing available to schools through our *Community Share* program. To enable communities to get the most out of budget dollars that are being spent on digital resources, Baker & Taylor has developed a unique Community Resource sharing model. The program builds links between local schools and the public library so that

children’s and teen materials at the public library can be accessed by students at school directly through their own local Axis 360 connection. In the community sharing program, Baker & Taylor has developed functionality that allows each school to have its own Axis 360 site, branded and scoped to meet its students’ needs. We offer these separate sites, all with access to content made available from the public library repository, at no extra charge. The communities working with us in this way have seen a four-fold increase in circulation of children’s and YA eBooks. The program is invisible to public library patrons but can be life-changing for kids in schools who do not have easy access to the kinds of materials public libraries purchase—the reading-for-entertainment titles that make it fun. The school can then focus its resources on licensing the curriculum content that is more frequently available with simultaneous use licensing. This content can be hosted alongside the shared public library digital collection.

The diagram below depicts the basic setup for these programs. We bring a wealth of expertise from both B&T and Follett to help make school sharing a success for everyone involved. From facilitating student authentication to providing statistics that enable the public library to demonstrate the impact it is having specifically in schools, B&T is the only vendor in the marketplace with the tools in place to make public library/school sharing truly work.



**Mobile App**

Patrons can easily read or listen within the Axis 360 app. Upon checkout, content is automatically downloaded to the patron’s device. Automated download prevents frustration for offline access once a user is away from an online connection.

The Axis360 eBook reading software enables patrons to manage the look of the title they are reading. Tapping the center of the mobile device screen brings up the settings features where users can opt to change font size, boldness, font style and text justification. They can also choose page color, brightness level, landscape layout, and tap advance style. The magnifying icon brings up a “search within the book”

feature, and the book icon allows for easy navigation by chapter, bookmark or notes. A progress bar displays across the top of the screen within the book viewer, and the top right hand corner provides a bookmark icon for easy page marking. Users can place notes within the book, highlight text, or refer to reference sources by simply pressing on desired text.

For users with visual impairments, the Axis360 app supports screen reading software incorporated in the patron's device. In-app text to speech functionality is in the final phases of development to further facilitate access and enhance the user-experience for people with disabilities.

The Axis 360 mobile application can currently be downloaded on any current iOS (v. 7+) or Android (v. 4.0+) platform, including Kindle Fire, and on computers running Windows operating systems. For patrons with dedicated reading devices that do not have browser functionality, eBooks can also be viewed on any Adobe-based platform accepting downloadable ePubs or PDFs.

### **Storing Passwords**

The Axis 360 mobile app stores patrons' login details. Once a patron has launched the mobile app and successfully logged in once, they will only be prompted to re-enter login information if they purposefully logout of the app or if they delete the app from their device. If a patron is accessing Axis 360 via the web, Axis 360 allows the patron's browser to store his or her login details. As long as they are logged into the browser properly, the Library ID and the Pin should auto-fill for them at log-in.

### **Third Party Software**

Reading and listening with Axis 360 does not require patrons to download third-party software. The Axis 360 reading software does not use Adobe DRM.

However, if a user intends to read on a dedicated eInk reading device that requires Adobe DRM, they may download Adobe Digital Editions to manage access to an ePub or PDF version of an eBook downloaded from Axis 360. Users of the Adobe service generally account for less than 1% of a library's Axis 360 circulation with declining usage since Baker & Taylor released of the Axis 360 browser reader.

### **Partnership**

Most importantly, at Baker & Taylor, we view Axis360 as a partnership with libraries. All of Axis360 development is library driven, and the Library will have an opportunity to attend monthly calls to weigh-in on development priorities. In addition, the library will be assigned a Relationship Manager (RM) who serves as a direct contact within B&T for all questions related to digital products and your ongoing business with us. Your Relationship Manager can help with training and community outreach, and will provide any additional support the library may require if it encounters any issues with Axis 360. It is the service and expertise that comes with Axis360 that truly differentiates it from other platforms.

Baker & Taylor actively supports the goals of ReadersFirst, and advocates on behalf of libraries for equitable access to digital content for loan to patrons, and for business models that meet their needs.

- Baker & Taylor provides full API integration for Axis 360 with ILS vendors, discovery layer providers, mobile app providers and individual libraries seeking seamless access for users.
- Baker & Taylor recognizes that libraries should be able to access the content that they purchase on the platforms they choose, and so supports the transfer of content licenses when publishers allow.

- Baker & Taylor does not require users of its services to create new credentials in order to access digital content, nor does it use or share any patron data to promote its services or the services of partners to the library's patrons.
- Baker & Taylor provides an ADA-accessible digital content solution for users with disabilities. Our services were designed with the assistance of the National Federation of the Blind, and our product development team includes an accessibility specialist.
- Baker & Taylor continues to work with libraries and industry champions to seamlessly integrate eBook services into systems designed by libraries and for libraries, including SimplyE and the Queens Library App, with the mutual goal of improving patron experience with eBooks.
- Baker & Taylor is proud to donate its digital content hosting and circulation services technology to support the White House's Open eBook Initiative, providing free reading materials for underprivileged children throughout the United States in partnership with First Book, the Digital Public Library of America and New York Public Library.

## BiblioBoard

### 1. Ease of use

- We've created a consumer grade product rooted in ease of use and obsessed with user experience. 1) We believe patrons should be able to access multiple media types on a single platform. Whether it's ebooks, videos, audio, or images. The notion of sending patrons to multiple platforms to view multiple media types may be the status quo but we believe that experience is unacceptable. 2) You shouldn't have holds on electronic content. Trying to explain to a digital native that they can't view an electronic file because someone else has checked it out it like trying to tell them they can't take a breath because someone else just did. 3) Mobile matters. Pew research shows that > 50% of those that have visited a public library website in the past year used handheld mobile devices. It has to work on smartphones and tablets. All of our content is available for reading with a single click and can also be contained in collections for easy browsing

### 2. The "Kindle" Factor

- BiblioBoard works on any Kindle Fire that is running on Android 4.0 or greater.

### 3. Use Statistics

- We provide Counter statistics by Library ID, specified periods of time, and format. We also offer detailed google analytics.

### 4. User Authentication

- Yes. We can authenticate however you'd like whether it's IP, SIP, EZproxy, Patron API, Geolocation, or referring URL

### 5. Collection Development

- All of our content is available for unlimited simultaneous use. We license content from over 350 publishers, including graphic novels from publishers such as DarkHorse, Valiant, Rosarium, BlueWater, Papercuts and many more. We also have a substantial collection of K12 content including HiLo books from Orca and Saddleback as well as more traditional K12 content from publishers such as Creative Company, Quarto, and Cherry Lake to name a few. Aside from traditional content we also have collections containing greater than 20,000 pieces of primary source content that get a ton of usage. For a deeper look at our catalog you can look here <http://catalogs.biblioboard.com/>. We also have a program in partnership with Library Journal called SELFe that helps libraries engage their local writing community -- <http://self-e.libraryjournal.com/>. This program not only helps libraries discover talent in their local community but also supports programming and helps aspiring authors accomplish their dream of being an author. SELFe also helps libraries identify quality indie books from around the world. Last year less than 25% of the best selling ebooks on amazon were from the big 5 publishing companies. Libraries that are only focused on collections from the big 5 are missing greater than 75% of most read books. Lastly, we have a program called creator that allows the library to move beyond authors and engage other creatives in their community whether it's musicians and artists, or oral histories and archives.
- Transferring. Any items that the libraries owns and has license to deliver on another platform can be delivered on BiblioBoard. One thing to consider is DRM. Many platforms have relationships with publishers that require single checkouts of content and is part of the license

agreement they have with that vendor. We are happy to work with you on any of this content, but keep in mind that everything delivered on BiblioBoard is unlimited. We can also manage the transfer of that content.

- BiblioBoard customers have exclusive access to all of our LJ SELFe collections, BiblioBoard Core and many other of our 350 publishers.
- BiblioBoard does not have a holds model.

## 6. Cost

- If every public library in the state were to purchase BiblioBoard inclusive of SELFe and Creator, the combined list price for the two products and platform fees would be \$486,500 annually. Given the current landscape we realize this is likely out of the realm of possibility for WILS. We also recognize that it is unlikely that every public library will buy our products but it is the opportunity for us. Given this, we propose a combined fee of \$150,000 per year (70% savings vs. list) -- This would include ALL WILS libraries, not just Publics. This price includes a branded submission form for each library, the Indie Wisconsin collection containing the best indie books in the state, and the LJ Select collection including the best indie books from around the world. The LJ Select collection would start with about 500 books organized by genre into General Fiction, Mystery, Horror, Thriller, Romance, Sci-Fi, Fantasy and YA and will continue to grow as more books are selected. Also included in this price is 23,200 pieces of curated Historical content that are all available unlimited multi-user.
  - Other content price varies based on terms with our publishers, but is incredibly affordable. Dark Horse Comics (one of our higher priced modules) as an example would be \$8,500 annually. This provides unlimited, simultaneous access to 765 (and growing) comics to all of your members via the web and app on all mobile devices. Hypothetically, if there are 1,000 member libraries, the cost for Dark Horse comics is only \$8.50 per library per year -- a little bit more than a penny per book.

## 7. Additional Criteria

- All of our content is unlimited simultaneous use and available on the web and mobile apps. A patron can store their password in both web version and the app, though we do not store any patron information. We do not require a separate 3rd party software.

## bibliotheca & 3M

### 1. Ease of use

- Anyone using the cloudLibrary™ app can instantly download digital content and borrow with one simple click. Other vendors use a time-consuming, multi-click process.
- The ease of use of the cloudLibrary™ platform simplifies the process for both patrons and staff.

### 2. The “Kindle” Factor

- When having this conversation about “Kindle” specifically, eInk Kindles, it is important to know that this particular device user base is only a small percentage in comparison to the rest of the devices that patrons are using to check out their eContent. When looking at that proportion of total number of “Kindle checkouts” publishers have shared with us that only a small percentage of them are actually on eInk Kindles. Instead patrons are using the Kindle App on their smartphones (Androids, iPhones) and tablets (iPad, Android) to checkout their items because the Kindle store is easier to use than the current platforms app.
- When looking at the “Kindle” Factor choosing a specific format during the checkout process causes much confusion for patrons and staff, not to mention the many patron privacy issues associated with the Kindle format. Research shows that eInk usage has greatly decreased over the past few years. According to Amazon data, the number one reading device is now the smartphone, which 7 out of 10 Americans have.
- **cloudLink™** -We have a revolutionary consortium cloudLink™ tool which greatly reduces hold ratios by allowing individual branch libraries to have private cloudLibrary digital collections prioritized for their patrons, while still having access to the consortia content. cloudLink™ allows libraries to have their own digital library with their name and branding, and allows for the purchase of their owned content all with the flexibility to share that content with other branch libraries as it becomes available. Only that library’s patrons may place holds on their owned content, thus giving them prioritization. However, when digital material demand lowers and those materials are unused, they may be shared across the library system seamlessly through our browse area of the apps. This allows other branch libraries to share books and get more circulation from ones collection when demand is waning, thus increasing circulation. There are many other great features of cloudLink™ that we would like to present to the committee.
- **Pay Per Use Hybrid program**- Pay per use allows for simultaneous access and the library or consortia just pays a small fee per checkout rather than purchasing the title. Our pay per use model will be a hybrid model, meaning you will have your ownership content alongside the simultaneous content so patrons always have something to borrow! One of the many benefits of this hybrid model is that the ownership content has priority to circulate first, and then if there is still demand for specific titles the pay per use content will kick in to fill that demand. We are the only vendor to have a hybrid model like this. This offering is a great way to vastly expand the eBook and eAudiobook collection without large upfront collection development costs. Most importantly it is helping solve the issue of patron complaints of long hold times for eContent.
- **Customization**- The cloudLibrary™ customer interface offers a customizable experience for patrons within the Browse area of the apps. Patrons can select and deselect certain content categories to build up shelves of their interests. They may change favorite categories to only see

categories that they enjoy. In addition, all categories can be filtered in different ways per the patron's preference. Other customization options and benefits may be presented to the committee.

### 3. Use Statistics

- We have many reports available to our customers which include all of the above. Full demonstration of reports and the functionality is available.

### 4. User Authentication

- We have the ability to authenticate users in real time with their library card ID numbers, for a one time login process. No email addresses or passwords are required.
- We also have a new feature that allows for temporary patron registration (depending on the libraries ILS) for those without library cards to create a temporary card which helps drive new users for libraries.

### 5. Collection Development

- As mentioned before we have an optional pay per use collection allows for simultaneous access for patrons on select content. This model is a hybrid model, meaning libraries have their ownership content (which has priority to circulate first if one of those ownership titles ends up on the pay per use catalog) alongside the simultaneous content so patrons always have something to borrow. The pay-per-use catalog will include both eBooks and eAudiobooks. There will be a small price per checkout.
- We have done more content transfers than any other vendor on the market in the past two years. We have the experience to execute content transfers in a timely manner, while handling the work of the transfer for the customer. Content types that are available for content transfer are both eBooks and eAudiobooks. Both metered content and perpetual content can be transferred as well, following all publisher guidelines. We have a full content transfer guide which we would like to present to the committee.
- With our pay per use model we are bringing publishers who have never before entered the simultaneous use market.
- Holds model is displayed in the number of days. cloudLink™ model brings many advantages in regards to holds ratios.

### 6. Cost

- cloudLibrary™ will work with the Wisconsin Public Library Consortium to put together pricing that will bring **great benefits and savings** to the group. We would like to present this pricing structure to the committee and board.

### 7. Additional Criteria

- As mentioned earlier, we have a hybrid simultaneous pay per use option for libraries, alongside an ownership model, something no other vendor offers.
- Mobile Apps are available, and sync on up to 6 different devices.
- Patron ID and PIN's are stored. It is a one time login process.
- We do not require 3rd party software.

## Hoopla

### 1. Ease of use

- The Hoopla website and apps have been built from the ground up with both ease of use and discoverability in mind. Users will find Hoopla very familiar feeling and easy to navigate from format to format and category to category.
- Patrons can easily borrow and then stream or download content with a simple click of the button and without the need to leave the Hoopla app or to move to an external source to enjoy their title.

### 2. The “Kindle” Factor

- Hoopla supports Kindle devices beginning with the Fire HDX and through the current family of Fire Tablets.

### 3. Use Statistics

- Each Wisconsin partner would have an account set up to offer reporting specific to that library. Our reports are offered in real time through a Library Portal ([www.library.hoopladigital.com](http://www.library.hoopladigital.com)) that can be accessed by the library at any time.
- Within the Library Portal (reporting site) there are various data points that can be used to pull reports to fit the library's needs.
- Hoopla usage reports can be run in various ways including the ability to designate a specific period of time.
- Real time usage and spending statistics can be accessed by the library at any time via our Library Portal.

### 4. User Authentication

- Hoopla Digital authenticates via a SIP II or API connection at the time of registering for a login using a Library Card Number and PIN (if the library requires on) We re-authenticate each time a patron borrows content from the service to assure their card remains in good standing with our partner library.

### 5. Collection Development

- Hoopla Digital offer simultaneous access to nearly 600,000 titles spanning Feature Films, Episodic Series, Audiobooks, eBooks, Music Albums, Comics and Graphic Novels. All without the need to load multiple Apps or to visit multiple websites for each format.
- There is no Transfer of titles as all 600,000 titles available to all patrons simultaneously.

### 6. Cost

- There are no annual, platform or maintenance fees involved in offering Hoopla Digital. The library is only charged a per circ cost when a patron 'borrows' the title.

### 7. Additional Criteria

- Every title available on Hoopla Digital features simultaneous use
- Hoopla Digital offers Apps in the Apple App Store, Google Play Store as well as the Amazon App Store. Hoopla is compatible with devices running iOS, Android and Fire operating systems.
- Username and password can be stored in both the website and the App version of Hoopla Digital. The website or App can be left/closed and then returned to without the need to log back into the service.

- When viewing a video (Feature Film or Episodic Content) via the hoopla website, the browser being used (Internet Explorer, Google Chrome, Firefox, ect.) may require a plugin similar to Adobe Flash Player in order to view the content. There is not a need for this when using the hoopla app as viewers, readers and player are built in.

## Vendor Summary

### **Baker & Taylor**

- Pros
  - Instant Audio playback, no downloads
  - eBooks can be read in a browser, an app is not needed
  - Provides an array of statistics
  - Allows transfer of content and negotiates with publishers
- Cons
  - Does not include Kindle format
  - Charges annual Hosting, Access and Services fee

### **BiblioBoard**

- Pros
  - All content is available for reading with a single click
  - Uses Google Analytics
  - Unlimited Simultaneous Use/ No holds
  - Allows transfer of content depending on DRM
- Cons
  - Cost

### **bibliotheca & 3M**

- Pros
  - Optional Pay-Per-Use feature
  - ID and Pins stored for ease of login process
  - Allows transfer of content and manages process
- Cons
  - Does not include Kindle format
  - Similar Holds format as current vendor

### **Hoopla**

- Pros
  - Simultaneous Use/No holds
  - Real time usage and spending statistics
- Cons
  - No Kindle format
  - No transfer of current owned content
  - Per Circ Cost model

# Outline for WPLC Advantage and Shared Collection Development Process

## 2017-3-23

As the Wisconsin Digital Library grows and continues to struggle with meeting the demands of high-use titles, it is time for a reaffirmation of the purpose of the collection as well as consideration of new procedures and policies that could potentially help with the issues facing the collection. At the same time, the WPLC Board is considering a formula that will allot a certain amount of money to the Advantage Collections of each partner. This change requires some thought about policies and procedures related to Advantage Collections. This document is an outline of the goals of a process to consider these issues. It includes questions for workgroup consideration, along with evidence needed to answer these questions. The intent of the document is to provide a framework for moving forward toward meeting these goals.

**Goal 1: Reaffirm or clarify the statement of purpose for the Digital Library Collection. Determine ways to market this statement of purpose to libraries and the public.**

Given the continuing concerns around holds, we would like the workgroup to review the statement of purpose for the Digital Library Collection, and to clarify or reaffirm the statement in order to provide guidance to the Selection Committee on purchasing and to also determine ways to increase understanding of the purpose of the collection among libraries and the public.

**Goal 2: Change Selection Policy and procedures to reflect statement of purpose**

**Question for consideration:** Given the holds issues that we continue to face, do we want to purchase fewer unique titles and focus more on funding additional copies?

**Evidence to collect:**

- How much did we spend on titles vs copies in the last two years?
- Looking at the unique titles we purchased in 2014 and 2015, how many current holds do these titles have? What is the frequency of the amount of holds?
- Is there any difference in amount of holds by genre?

**Question for consideration:** Do we need to change policies or procedures for Request To Library to help with holds and to reflect the decision above? Should there be more patron-driven selection for titles?

**Question for consideration:** Should we be thinking about popular titles in different tiers and purchase differently? For example, might we focus funds on popular titles (at one or both levels) rather than “super sellers” to provide better holds ratios on more titles and worry less about meeting demand on titles where we never will?

**Question for consideration:** What is the best purchase model for bestsellers? Should we be purchasing One Copy, One User or metered?

**Evidence to collect:**

- Information on the general attrition of best sellers: how does use of these titles drop over time?
- A list of the 50 titles with the most holds, along with their cost per copy for metered and OCOU and total the spend we’ve made per title.

**Question for consideration:** Should the Selection Committee be restructured, based on these decision?

**Goal 3: Develop policies related to Advantage Collections**

**Question for consideration:** What is the overall purpose of Advantage Collections? Should the primary purpose be purchasing additional copies of titles in high demand? Should any unique titles be purchased at the Advantage level, whether system-funded or shared-collection funded?

**Question for consideration:** What is purchased with shared-collection funds that are placed in Advantage accounts? Do we include audiobooks?

**Question for consideration:** How might the two levels of collection (shared collection and Advantage) work together to help reduce holds? Some ideas for consideration:

- Purchasing a larger number of copies at the consortium level and then waiting to purchase more for a certain time period, with responsibility for adding copies at the Advantage level for that time.
- Purchasing a limited number of copies at the consortium level, with the expectation that Advantage accounts will take care of the rest.
- Allocating a maximum spend per title at the consortium level (instead of copies).
- Identifying “red alert” titles for Advantage selectors to purchase.

**Evidence to collect:**

- Holds fulfillment exercise\*: This could be done with a number of different parameters to see the impact of various ideas above.

**Question for consideration:** Who owns the titles in Advantage Collections? Does it matter what funds are used to purchase the titles? How does Advantage Plus or other programs impact this ownership?

Goal 4: Develop procedures related to Advantage Collections

**Question for consideration:** How can we make purchasing for Advantage selectors as simple as possible?

**Evidence to collect:**

- Options for creating carts: can carts be generated automatically by some parameters? What are those parameters?

**Question for consideration:** How do we assess the impact of spending and how well Advantage accounts are performing?

**Evidence to collect:**

- What reports/measures do we have to show how well an Advantage account is performing compared to consortium/other systems?

**Question for consideration:** Is there a specific schedule that the consortium and Advantage selectors should use to make the most use of the dollars? How do special sales factor into this?

Goal 5: Create materials to communicate these decisions to patrons and library staff

\*The basic methodology for the holds fulfillment exercise would be: Assume a new title is added to the collection, with 200 copies. It's very popular, so 4000 holds have built up before it is released. Assume everyone's loan period is 4 weeks, and that there are no early returns.

1. Create a list of randomly ordered holds by system by 2016 holds percentage ratio
2. Fulfill 1000 of those holds two ways:
  - a. All 200 copies are held at the Consortium
  - b. Copies are divided by new buying pool formula. Assume Advantage titles are purchased one week after the initial purchase by the Consortium.

This methodology could be changed to test various scenarios.