

[eBooks and Libraries](#)

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ALA TechSource Workshops: **eBooks and Libraries**, parts 1 January 25 and part 2 February 1 | **Sue Polanka**

Yesterday I passed a few hours waiting for the blizzard to come in by looking at the 'required reading' the eBooks and Libraries workshop discussed in the [Follow up post for Part 1: Purchasing eBooks](#) and [Sue's slideshow](#). I have several pages of notes about distributors and aggregators, about what academic libraries want from eBooks, some very interesting information about patron-driven acquisition (not available with OverDrive) and finally some thought provoking findings from a study the Chief Officers of State Library Associations funded called "[COSLA: eBook Feasibility Study for Public Libraries](#)." Our State Librarian, Jo, was one of the participants. I'll have to ask her about this very cool report the next time I see her!

Additional reading that I've enjoyed:

1. Chris Rippel has some interesting things to say about [eBooks in Libraries](#)
2. Brenda shared this post [Kindles and Androids and Nooks \(Oh My!\)](#) from bestofpublib – good overview
3. From Royce – [Six Trends to Watch in 2011](#) by a book publisher (michaelhyatt.com) – so 'insider info' of sorts
4. Finally, the [eReader Resources](#) from nekls.org, including some great articles by staff and guest authors

The COSLA study posited that "when enough people choose convenience over a sharing model, the relevance and mission of public libraries are in jeopardy" (p.6). The study concluded that these are needed:

- a low-cost way to lend devices or a way to let people try them out (like the NEKLS Tech Toy Box)
- improved ease of use for discovering and getting eBooks from the library
- expand access through larger collections and buying pools (hmm, like a Shared Regional Catalog?)
- apply leverage to vendors and publishers for improved pricing, licensing, reasonable Digital Rights Management that allows shared use (ILL)
- explore how libraries can move from being content suppliers to "creating spaces that invite social interaction around learning and living literature" (p.6) with expanded explanation on p. 48)
- The ideal device for lending would be simple to use, durable, cheap, rechargeable, cordless and accessible

- eBooks provide 24/7 library services to people who NEVER come to the building
- “improving the eBook browsing and downloading experience for library patrons is critical for competing more effectively with commercial alternatives” (p.10).
- “If public libraries no longer need to worry so much about an archival role or providing popular materials, how should they fulfill a noble mission to support a vibrant ‘life of the mind’ in their communities?” (p. 13)
- why don’t libraries work together to become the champions of self-publishing? For example, “Librarian Maggie Balistreri of Poet’s House in New York City depends entirely on donated works to build her poetry collection and pays back her poets and publishers at every turn, including an annual collection development event that showcases all the new work she collected over the past year, organized by publisher” (p.39).
- Living Literature: “At the heart of public libraries is a belief that democracies benefit from having a place that celebrates the open exchange of ideas. How can we find new ways to do this that go beyond collections?” (p. 48)
 - “Aarhus Public Libraries in Denmark launched the Transformation Lab, an open, flexible space for experimenting with new modes for public libraries.”
 - “Four broad roles for library staff emerged from the Transformation Lab experiments in Aarhus, Denmark: disseminator, host, facilitator, and advisor. ” (p. 48).

Finally, the **Archived Webinar** by Sue Polanka, Wright State University Libraries – **Purchasing eBooks**

- While 66% of libraries offer eBooks, only 7% of people polled said they were downloading books from the library! Check out [Sue’s slideshow](#) for the rest of the statistics...
- We are at the **eBook tipping point** because they are POPULAR and because some benefits like 24/7 access and “no shelf required” are overcoming issues like business models, DRM, formats, etc.
- **eBook Types:** downloadables – purchased with one book, one user access, ebooks and audiobooks in various formats v. “view only” ebooks – use and view on a Web browser, multiple users, include reference, academics, classroom materials
- **Vendors:** EBL (academic), OverDrive (public), eBooks on Ebscohost (formerly NetLibrary), Ingram MyiLibrary (academic and downloadables), ebrary (variety of content)
- **Business Models:** one book-one user/checkout (public OverDrive model) | multi-user (Academic/Reference/K-12, defined number of user) | unlimited use | Collections (bundles or sets) | Subscriptions (buy set collection or set and titles may change) | Patron Driven (more to come later) | Short-Term Loan (inquire about access fees with the vendor, may be waived or weighted.)
- **Patron Driven Acquisition:** Developed by academics experimenting with ILL: Libraries select titles, MARC records are put in the catalog, use of a book triggers purchase, pre-determined triggers/price points/limits/time spent browsing the book/printing from the book with vendor, ensures guaranteed use of purchased content, but still needs coll. dev. for a balanced collection. Expect to spend time monitoring and tweaking the plan

(small budget, pilot program, 1-5% of book budget). (I read more about this in the pre-reading and I really like this model and am sad that OverDrive doesn't provide this service, just has hold thresholds that lead to auto purchases of additional copies.)

- **Short-term Loan** – lease or loan the book from aggregator or publisher for X-days for a percentage of the list cost, cheaper than ILL, more new content for less cost – See Resources Slide.
- Buying **Direct from Publishers** – Text books, one platform for content, include enhanced content, more room for negotiations...but more license agreements, eManagement hassles, different platforms, not option for trade titles. Not very feasible for Public Libraries – must use an aggregator.
- Buying from **Aggregators** – one platform, many publishers | single license | better viability of smaller publishers | Coll Dev services | ebrary and ebscohost have large-scale Discovery systems...but not all publishers' content released | delays | no negotiation | consortia limits | steep fees | who archives content as aggregators don't own it, the publishers do...
 - Publishers nervous about collective/consortia purchasing and are refusing to work with or limit size of consortia – example from State Library of Ohio overdrive consortia – libraries could buy into shared and at first academics could joint, but that stopped.
- **Q & A** - B & T's Blio – Sue has high hopes but slow to come to market and no word on when a library product will be out | lack of standards across vendors, how do we deal with it? Sue says to be vocal about it and speak to vendors or join advisory boards | Host an “ask the aggregator” session at your conference | Who is responsible for “IT issues”? patron questions about devices becoming library's role and overdrive provides support and training and a direct phone line for patrons
- **Consortial Purchasing Issues** - (think Audiobooks, Music and More) – publishers don't want to share, COSLA report mentions consortia issues and OverDrive, individual libraries have individual needs, attempts at approval plans and Patron-driven hard because of negotiation challenges, larger lines for popular titles (long holds=unhappy patrons with a new service!), and ‘negotiating the multiplier’ – have to buy a certain number of copies
- **Selecting Content** – Subscribe to a product (reference content), purchase subject collections/bundles OR individual titles, rely on patron-driven selection, utilize coll dev teams or use the aggregator's lists and collections and coll dev services (overdrive and ebsco offer this)
- **Evaluating Vendors** ([matrix on wrap-up page](#)) – Start with content, evaluate based on criteria, content, business models, user interface – test, test, test, DRM/restrictions, stats/use data and support
- **Budgeting** – No best practice yet (4% of Phoenix Public's budget on ebooks and majority at 3-5% with publics and academics at 6-10%), reallocate funds, expect to pay full price, purchase v. lease, short-term loan v. ILL, fees and ongoing costs? start with a pilot project to create a sustainable model
- **Barriers to Access** - cost | licensing | MARC | metadata | archiving | accessibility | restrictive DRM | devices | formats | loading/lending

- [Read this article](#) and visit libraryrenewal.org
- **Archiving/Perpetual Access** – Publishers OWN the content, so how do we ensure access in the future? Portico eBook archiving (non-profit that now archives eBooks, along with eJournals for a fee), Costs for housing eBook v. bound book, what if the aggregator goes bankrupt or lose their servers? – Proposed solution – broader/ International by Kari Paulson – alliance between publishers, aggregators and libraries through alternative platforms
- **Accessibility** – sensitive spot for librarians – some eBooks are NOT accessible, most readers are not accessible, HTML works best with screen readers, DAISY format is accessible, ePub 2.1 Charter eBook standard slowly gaining popularity, PDF (majority of eBook content, but jury is still out on accessibility for this, depends on mark up and structural elements)
- Conclusions – great, but challenging. Blogs and twitter feeds that Sue subscribes to include:
 - No Shelf Required – www.noshelfrequired.com
 - Teleread: www.teleread.org
 - Resource Shelf: www.resourceshelf.com
 - eBooknewser: www.mediabistro.com/ebooknewser/
 - The Digital Reader: www.the-digital-reader.com/
 - Go-to-hellman: go-to-hellman.blogspot.com
 - ALA TechSource blog: www.alatechsource.org/blog
 - LJ/SLJ ebook Summit: @LJSLJebookSummt on Twitter

Webinar Part 2 Pre-reading

1. [May a library lend ebook readers?](#) (which lead to another interesting blog post about innovation in libraries and “[When librarians are obstacles](#)”) – So, have you carefully read the license agreement on that kindle you bought for the library? How do you interpret “solely for your personal, non-commercial use”? If you are considering a device-loaning pilot, have you talked to an attorney about it? Or are we just being ‘risk averse’? I look forward to hearing what Sue has to say about this in today’s webinar.
2. [Ereaders and Libraries](#) Slideshow by Beth Bouwman – Interesting research paper citing several libraries (public, school and academic) who have loaned eReaders, including a discussion of the legal issues. Sony Readers maybe a safe bet, as they donated 1,000 to Penn State, but Beth cites conflicting responses from Amazon about the legality of lending Kindles. check out the References...interesting follow-up articles.
3. The River Forest Public Library Experience with the Kindle by Blaise Dierks from No Shelf Required: eBooks in Libraries by Sue Polanka ([pages 68-69](#)) – River Forest decided to ignore the ambiguous Service terms from Amazon and continue with their successful Kindle loaning program until told to stop. The Kindles are pre-loaded with books (fiction Kindle, NF Kindle and Mystery Kindle (note the lack of Romance...)) and then the connection to the library’s Amazon credit account is severed. Oh look, more about the [Sparta Public Library’s program](#) that lets folks download one book for free and then pay for the rest (and I would guess get a “thank you for donated 3 eBooks to the Antytown Public Library” tax letter). They’ve doing this since 2007!

4. The Penn State University SONY E-book Reader Project by Anne Behler, from No Shelf Required: E-Books in Libraries by Sue Polanka, [pages 88 – 90](#) – I'll read this one later, it's an academic library case study. And yes, we do own a print and e-copy of No Shelf Required at NEKLS.

Webinar Part 2: **Integrating E-Books and E-Readers into Your Library: Lending eBook Readers in Your Library** (#ebookworkshop) (hehe, the presenters are Mac users) [Follow Up Post!](#) and [Slides](#)

- Updates: ebrary now has fiction and Ebsco will have ePub
- “It’s about offering options” – Lisa Neal Shaw
- 29.4 million people will own eReader by 2015
- Gizmodo says eReaders are already on the verge of extinction
- Kindle has a 76% market share
- Agenda for today: Devices, Formats and DRM, Establishing a program, Certification and Predictions
- **Devices** – 50 Dedicated (Kindle/Sony Reader/nook), Tablets (iPads), Apps for phone (Kindle, B&N), PC/Mac (note that overdrive does not work with Linux)
- **Software/Apps:** Bluefire App (slideloan library books) | Adobe Digital Editions – use to download, store, transfer ebooks using ADE – it’s free, but must be registered to a single user. Single registration can be used with up to 6 computers and 6 devices
- Textbook devices: Kno and EnTourage Edge, nookStudy and iPad app
- **Ebook Formats:** ePub, txt, html, daisy, pdf and Amazon’s azw (doesn’t play nice with others)
- **DRM!!!** Software that wraps itself around the ebook format that poses the main barrier – where you can view the book, for how long, what the check out period is, yes/no you can download, yes/no print, yes/no copy and paste. Different for each Vendor.
- **Standard is EPUB** – adopted in 2007. Allows transfer of info between devices and systems. Not used consistently. EPUB 2.1 coming with greater accessibility. Sony and iPad adopted EPUB as the standard, but DRM can be added on top.
- **Compatibility with eReaders:** wifi/3G/4G access devices (that work with your web site), OverDrive – EBL – eBooks on EBSCOhost have Adobe DRM so they are compatible with Adobe Digital Editions so you can transfer books from these sources to different readers. MyiLibrary, ebrary and Follett are not there yet.
- **Stripping DRM and Converting** – have the ability to convert an eBook format from one to another – is it legal/ethical? probably not for a library, but maybe justified for an privately owned device. Use [calibre-ebook.com](#) eBook management system – stores, converts and reads eBooks (how to articles in Wired and Apprentice Alf’s blog).
- **Free eBooks and Public Domain** – most in ePub or PDF formats: Project Gutenberg (OverDrive and Kindle direct) | Internet Archive | International Children’s Digital Librar | Google Books | HathiTrust and more.
- 1st ebook was 1971 Declaration of Independence by Project Gutenberg.
- [MARC records from Colorado](#) – thanks to Valerie Horton
- **Establishing an eReader Program** – and I lost audio...I’ll have to finish my notes from the archive I get tomorrow via email...

- **Legal issues:** Early 2008 – Sparta public first to do it. Many went to Amazon and asked for permission – nothing in writing Yes or No. Devices meant for personal use by a consumer. Read the license and proceed with caution (and know that everyone is doing it). No enforcement or no incident that Sue knows of. Need help establishing some guidelines so we can do this ethically...say from our Association!
- **Why?** What's your purpose: intro new technology | grant | demonstrations/ educational | offer options to people who like device-reading.
- **Make it a TEAM effort.** Get permission, get a budget, purchase the items tax-exempt, catalog/inventory them, acquire content, catalog content, policies and procedures for circulating the items, publicize and market, train/workshops on them
- **Select device/s** – Kindle (easy to purchase content), nook and Sony and kobo and iPad – popular for lending. Sue says start with one device, maybe 2.
- **Beg/borrow/steal ideas from other libraries** and Sue – blog posts, articles, stories from libraries. Guides – Buffy Hamilton libguide, Duke University libraries (with videos), and Wright State's guide.
- **Budget:** Purchase of hardware and cases (the stuff) AND ongoing content costs – what budget line? Readers out of Coll. Dev. or Technology?
- **Policies and procedures** (more to come) and Assessment – yes? why? statistics?
- **eReader Program Options:**
 - In library viewing 'petting zoo' (Tech Toy Box) – no legal issues
 - 2 hr reserve, in-house use (fewer damage, theft issues)
 - Loan reader with pre-loaded content (most popular option)
 - offer downloadable content for personal devices (no device)
- Sony page: Borrow eBooks from your Local Public Library – with link to participating libraries
- **Budgeting:**
 - Devices – \$139-\$249 (iPad closer to \$500)
 - Hard/closing Cases – \$35-\$45
 - Trade Books – \$5-20 (\$9.99 standard, but can get cheaper)
 - Warranty/extended care – \$20 per device (we get this)
 - Cords/plugs – \$10-\$30
 - Buy in groups of 6 for best deal on content (with Adobe Digital Editions you can register 6 devices and then can share title on up to 6 devices, so cuts the price of the content)
- **Purchasing Content:**
 - Establish online accounts with vendors (we created a new email address just for the Toy Box)
 - Credit card (Have to Have. Make sure you **un-link** it if you loan the device) Backdoor – purchase order for a gift card or disposable credit card.
 - Tax exempt – Easiest if you take a certificate to the store if you buy it in person – need a combined effort...

- Share titles on 6 devices, usually
- Wireless loading on many or 3G (pay extra) – Built in wireless in the device has “go find new content/synch” option or use Adobe Digital Editions and transfer via USB
- Will patrons purchase titles? Not sure how this is regulated. Let them buy it before you de-register it? Disposable credit card?
- If not: with Kindle, ‘de-register’ the device | nook – ‘use default’ trick
- Can patrons request titles? YES – set up policy in advance. How many can they request? Cost limit? genre limit? How often will you load content onto the device – can be time consuming.
- Tips for Loaning:
 - Catalog the device / titles in the notes field. keyword search for discovery
 - Preload content – use free to supplement.
 - Genre specific or grade level or theme – can share titles between 6 devices.
 - Circulate in bags or boxes – reader, cover, cords, manual, scan manuals for reference/printing
 - Property tag EACH PIECE
 - 1 or 2 week loans, hourly too for in house loaning
 - Check for damage? Turn on? Checklist of bag contents?
 - Remove notes/highlighting (privacy issue) – Set all the books back to “home” or page one.
 - Recharge or ask the patrons to do it? Too popular to recharge? Kobo and sony did not come with USB AC adapter
 - In 8 months, Duke has returned 3 damaged. Malfunctioning devices may be replaced. Policy – pay full replacement by patron.
 - Deposits? Some require a signed agreement form with replacement amounts. Schools – parents sign up front. At wright, they have books worth \$139, so why sign a form for equivalent but different format. Not heard of any deposits.
- eReader Certification – may solve issues with ADE/legally/ethically loaning
 - Derived from COSLA report – find a reading device that is certified for library use – so OverDrive is working with this
 - Specs have been created
 - Working with manufactures for design or adaptation
 - Devices sold to libraries for checkout
 - No content on device, patron can get whatever books they want, return it and wipe it.
 - Don’t know what other companies it would work with
- SONY Reader Library Program
 - 30 libraries participating
 - Training provided on the devices
 - Education materials on eBooks
 - Devices – use for Staff use and for patron demonstrations (not for loaning them, yet) – marketing, awareness and training
- Sue’s Predictions

- eContent – format will be null and void – not ‘eJournals’ or ‘eBook’ – print on demand means ...
- Nothing will be out of print!
- Cloud based electronic content on networked server – choose device 24/7
- Death of Devices (See [Gizmodo article](#)) – Cloud of CONTENT – wireless links to: personal computer, dedicated reader, smart phone, tablet, mp3 player – networking wins. Multiple function wins. Tablets are already out there, but an opportunity to create new ones and if content is in the cloud, the device could be a personal choice and change like a purse 😊
- Libraries adapt – as we always have... Internet in 1993. We jumped into it, trained, embraced it. We are all about books!
- DIVX from 1999 – same issues we currently have with eBooks. registrations and all – those went away, so maybe the issues/limitations to ebooks will go away, too!
- Debate about Kindle app and Apple – all about \$\$\$. Yes, a step backwards.
- Resources – Read “[Why Amazon will never work with libraries](#)” | [Follow Up Post!](#) | [Remainder on her slides](#).