

Squeezed between the E's: Electronic Resources (Print Monographs) Economic Woes

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Print Monographs:

Pressures:

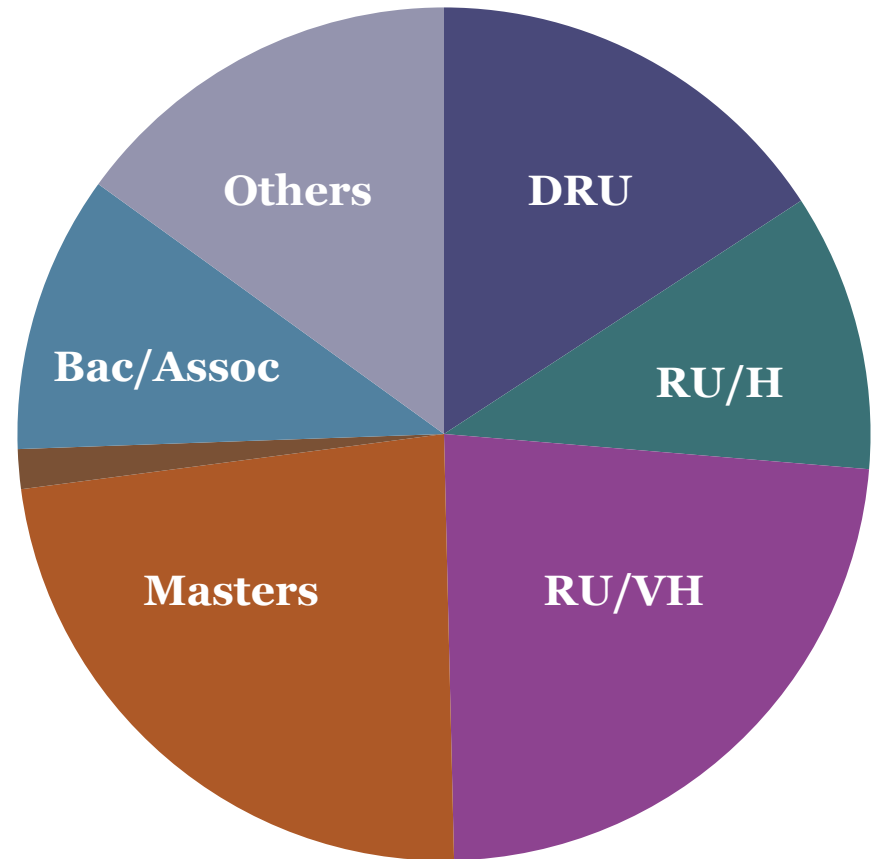
- Economic
 - Loss of purchasing power
 - Losses in endowments
- Electronic Resources
 - Databases
 - E-journals
 - E-books

Budgeting:

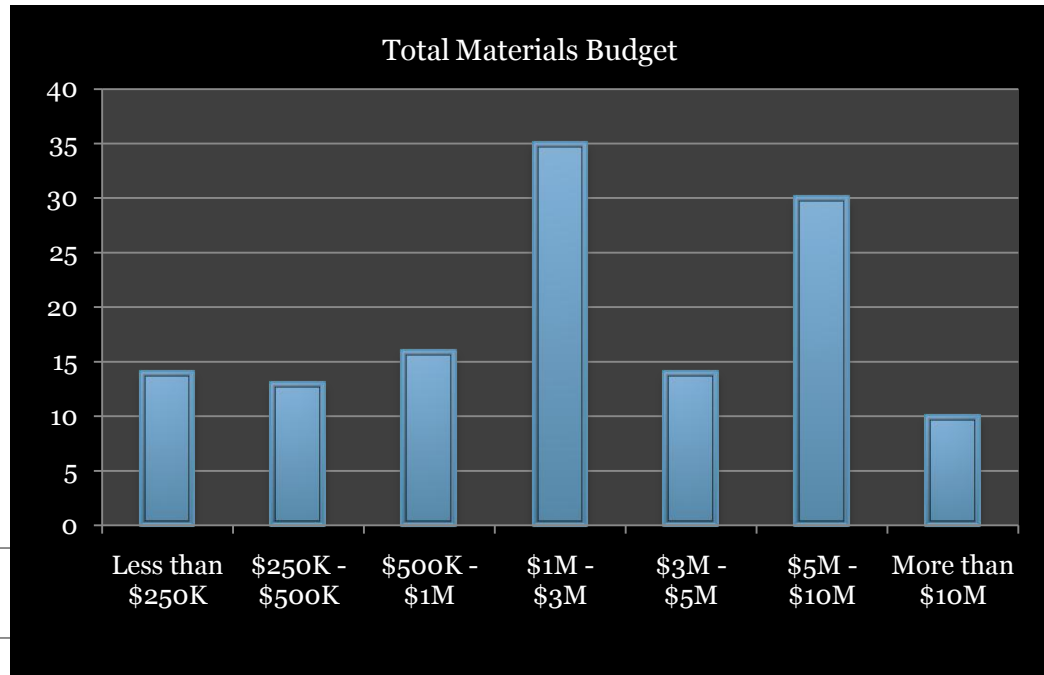
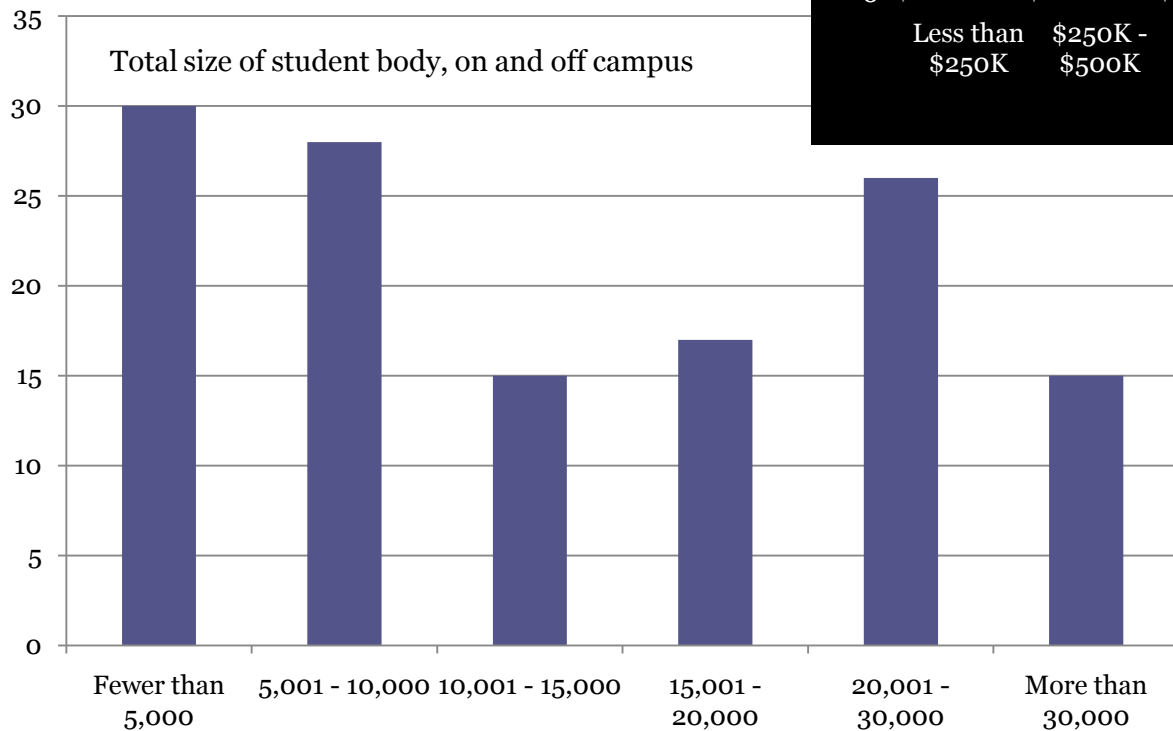
- Approval plans
 - Increase/Decrease
 - Print/(Electronic)
- Firm orders
- Place of E-books within these monograph-oriented budgets

Snapshot 1:

- 134 respondents
- Nearly half from
 - DRU + RU/H + RU/VH
- Nearly all ACQ or CDV
- Serving:
 - 116 are central library
 - 5 vet/med
 - 10 specific disciplines
 - (half of these are science-oriented)



Snapshot 2:



Materials Budget Changes:

- Changes in last 5 years (109 answers):
 - No change: 18
 - Net increases: 67
 - Net decreases: 24
- Changes to current year from last (111 answers):
 - No change: 37
 - Increases: 39
 - Decreases: 35
- Changes expected for next year (110 answers):
 - No change: 29
 - Expect increase: 12
 - Expect decrease: 69

Approval Plans:



- Use of approval plans:
 - 79 have/will establish approval plan (31 no)
 - 60 established more than 5 years ago
 - 13 newer than 2 years or in planning stage
- Budget devoted to approval plan:
 - This year: Generally less than 20%, 27 reporting a decrease from previous year
 - Next year: Nearly half expecting decreases
- Oversight:
 - Primarily Acq and/or Collection Development (60)
 - Administrative and liaison librarian models also mentioned

Reasons to Change Approval Plan Allocations:

INCREASE

- Inflation: 13
- Ebooks added to profile: 9
- Decreased time to select: 8
- Profile expansion: 7
- Convenient and efficient: 7
- Lack of subject expertise: 4
- Shifts in research/teaching: 4
- Not applicable: **38**

DECREASE

- **Downturn in economy: 36**
- Serials inflation: 26
- E-resources inflation: 25
- Shift emphases to e-resources: 24
- **Change monograph type from print to e: 16**
- Decline in print books use: 11
- Shelf space limitations: 10
- More money to firm orders: 8
- Profile not meeting needs: 6
- Shifts in research/teaching: 5
- Not applicable: **27**

Firm Orders:



- Budget devoted to firm orders:
 - This year: Generally up to 20%, 45 reporting a decrease from previous year
 - Next year: More than half expecting decreases
- Oversight:
 - 80 said purchasing decisions made by librarians or librarians w/input from teaching faculty
- Correlations between firm and approval allocations:
 - 61 respondents indicated some kind of correlation between the allocations
 - 21 indicated changes to the allocations occur independently of one another

Reasons to Change Firm Order Allocations:

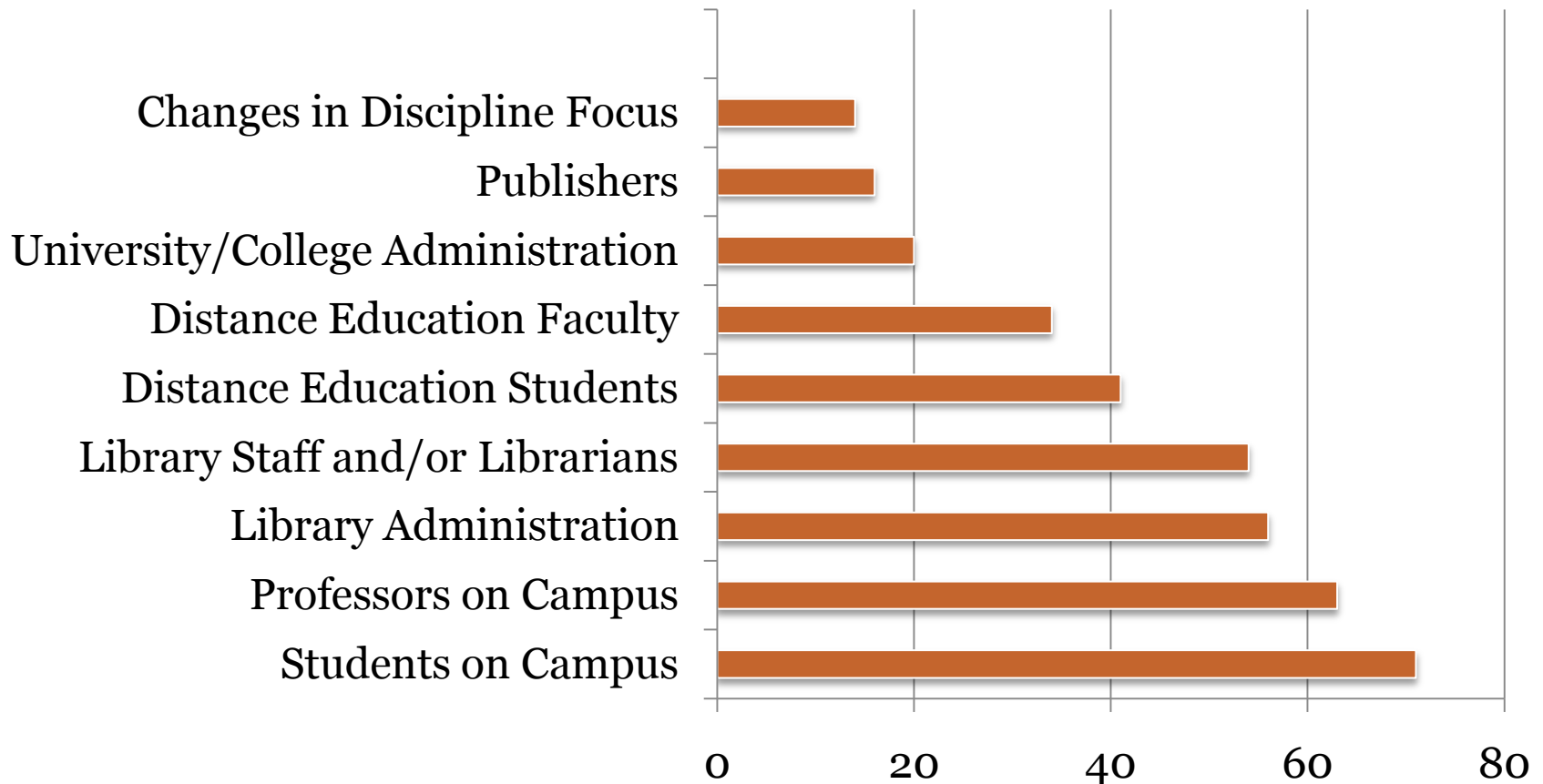
INCREASE

- Approval plan not adequate: 7
- Inflation: 7
- Reduction in approvals: 7
- Shift in research/teaching: 4
- Greater emphasis on materials not avail on approval: 4
- Ebooks eligible for firm orders: 3
- Not applicable: **42**

DECREASE

- **Downturn in economy: 60**
- Shift emphases to e-resources: 36
- Serials inflation: 37
- E-resources inflation: 33
- **Change monograph type from print to e: 19**
- More money to approvals: 10
- Decreased time to select: 10
- Shelf space limitations: 8
- Missing subject knowledge: 1
- Not applicable: **15**

Pressures to Acquire Electronic Content:



E-book Purchases:

- 93 respondents (88%) currently purchase E-books
 - 80 title by title
 - 72 in packages
 - 12 on an approval plan
 - (5 comments on consortium purchases)
- Selection responsibility:
 - 53 librarians (31 lib + faculty) for e-books
 - 47 lib + faculty, 33 librarians, 8 faculty for print



E-book Approval Plans:

12 E-BOOK APPROVAL PLANS

- All have materials budgets above \$1M
- 11 have approval plans, 10 more than 5 years
- Half did not change print book approval plan
- 5 RU/VH, 1 RUH, 3 DRU
- 3 with a separate allocation than the print book approval plan

CHANGES TO PRINT APPROVAL PLANS

- Restrict publishers (7)
- Delay print for publishers (5)
- Restrict subjects (4)
- Delay print for subjects (2)



Conclusions/Predictions/Ideas?

- Worse budget news now...
- Budget conditions speed up changes already underway
 - Janus Conference: Procon and Core Definition
- Approval plans must continue evolving:
 - More granular selection options (and increase service to smaller institutions)
 - Range of service relationships (eg., ERMS, Project COUNTER)
- E-Book publishers must change faster:
 - Work better with vendors (including reducing time differential between e/p availability)
 - Make approval plans a viable option

Further Reading:

- Fenner, Audrey. 2004. The approval plan: Selection aid, selection substitute. *Acquisitions Librarian* 16, (31): 227-40.
- Jacoby, Beth E. 2008. Status of approval plans in college libraries. *College & Research Libraries* 69, (3): 227-40.
- Levine-Clark, Michael. 2007. Electronic books and the approval plans: Can they work together? *Against the Grain* 19, (2): 18, 20, 22.
- Lorenzen, Elizabeth, and Suzanne Kapusta. 2007. Long live the approval plan, even in a time of financial constraints... *Against the Grain* 19, (3): 40, 42.

Questions?

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