



Howard-Tilton Memorial
LIBRARY

Guidelines for the Selection of Digital Resources

The library is committed to providing its users with access to up-to-date digital resources. Preference in the selection of digital resources is given to arrangements with the widest access, e.g., those accessible via the campus network. Purchase arrangements for access-only versus ownership are considered. However, ownership is preferred when online access would replace print subscriptions currently held in the library; this is considered important to retaining the fundamental value of libraries in the digital age.

Purchase of subject-specific digital resources such as online journals, e-books, and specialized databases may be made by individual subject liaisons when affordable from the subject-specific funds they manage, and using the established selection criteria listed here. Generally a new digital serial may be added by either making a permanent transfer of the item's current annual subscription cost from a book fund into the digital serials fund or by dropping and swapping a title of commensurate value within the parameters of an existing package.

Subject liaison librarians are responsible for ascertaining whether or not the library already owns or has access to a digital resource by checking the catalog before ordering a new copy. Complete bibliographic information is required for each order submitted. With each order, subject liaisons are to specify the preferred platform, identify format as print and/or online, and approve transfer between book and serial funds.

Digital resource orders and cancellations should be placed with the Head of Acquisitions in the Technical Services Division.

Subscription Databases: When the budget allows, subject liaisons may make recommendations for more expensive or multi-disciplinary subscription database purchases to the library's Collections Management Group. License agreements should meet the Library's licensing criteria adopted from the Association of Research Libraries (ARL) Principles for Licensing Electronic Resources. New licenses are approved and signed for the library by the Associate Dean of Libraries. For more purchase options see the section below labeled Decision to Purchase.

Requests for database subscriptions to be considered by the Collections Management Group are normally solicited in a call for requests made by the Associate Dean of Libraries to the Collections Group, generally made in the early fall or near the end of the spending year. Otherwise, during years in which little money is available within the general collections budget for new, higher-cost digital subscriptions, special requests may be considered by the Collections Management Group on an as needed, individual basis.

Online Journals: It is the general practice of the library to routinely seek internet access to its journal subscriptions and to provide links to them in the Local Catalog. Online versions are automatically sought by acquisitions staff at the time of each print journal renewal. Generally, online access will not be substituted for print issues unless ownership and adequate archival provisions such as those offered by Portico or JSTOR can be assured.

Digital Archiving: The Howard-Tilton Memorial Library shares with other research and educational institutions the responsibility to determine the most effective methods for the long-term preservation of the digital materials acquired by the library but not stored locally. Resources lacking fixed responsibility for long-term preservation are considered only selectively. The library has a special preservation responsibility for digital resources it may acquire or create that are unique to its collections.



Consortia Purchasing: The library participates in a number of library consortia—including LOUIS/LALINC, Lyrasis, and the Association of Southeastern Research Libraries (ASERL)—in order to take advantage of aggregated purchasing agreements for digital library resources. It seeks other consortium licensing opportunities whenever they serve the best interests of Tulane University.

Policy Criteria

Overall, the selection of digital formats should reflect the library's other practices for collection development and acquisitions. More specifically, potential purchases should be assessed with regard to the following:

- Consortium availability, through which purchase is preferred. This information may be obtained from the vendor by the inquiring librarian or Acquisitions staff at the time of purchase.
- Licensing or other limitations on the use of the database.
- User and academic program needs and demands. Special attention should be given to resources that provide coverage of high-priority or under-represented areas.
- Reputation of the producer and vendor.
- Comprehensiveness, scope, and indexing accuracy.
- Timeliness of updates or culminations.
- The relative difficulty of using the print version versus the digital version.
- Interface usability and platform quality.
- Cost in relation to value (see Cost Criteria below)

Service Criteria

Overall, the selection of a digital resource should conform to Tulane University's general plans for establishing a digital information environment. Staffing and training levels should be considered. Specifically, potential purchases should also be assessed with regard to:

- The potential effect that the product would have on the demand for interlibrary loan
- The potential impact the product would have on the demand for user assistance from librarians at the reference desk
- The potential impact the product would have on the need for additional user education or printed literature guides
- The potential impact the product would have on the need for set-up or maintenance
- Any need for restrictions on access to the database as required by licensing, sales agreements, or the requirements of Tulane students, faculty, or staff
- The availability of built-in user education features such as tutorials and help screens



Technical Criteria

Overall, the selection of electronic databases should reflect the library's current or planned level of technical resources, as well as its current or planned level of in house technical support. More specifically, potential purchases should also be assessed with regard to the following criteria that apply mostly to non-internet formats such as CD-ROMs or computer software:

- The necessity of technical support and maintenance for the product
- Software issues that include: menu-driven versus command-driven features; database complexity for end users; security features that protect against tampering, viruses, or theft; and, flexibility for networking
- Hardware issues including: reliability, maintenance, compatibility with peripherals, flexibility for networking, and security from tampering or theft
- Compatibility with existing systems in the Library and with systems currently or planned at Tulane University
- Environmental and space requirements for equipment and work stations

Cost Criteria

Costs are an important concern and potential purchases should also be assessed with regard to the following:

- The relative value of the format considered versus access through some alternative means.
- Availability of options or price differences relative to consortium availability, lease, or specified number of users.
- The likelihood of additional costs for updates or upgrades.
- The possibility of unseen startup or maintenance costs.
- The shelf life of the product and its replacement costs.
- Availability of packages, credits for canceled print, or other special deals.

Licensing Criteria

The full list of licensing criteria from the Association of Research Libraries (ARL) Principles for Licensing Electronic Resources, to which the library adheres, can be found at <http://www.arl.org/sc/marketplace/license/licprinciples.shtml>. But overall the library seeks to avoid licenses that could be considered unreasonably restrictive in defining authorized users (such as prohibiting access to walk-in users) or that may restrict or abrogate the rights of the library or its user community permitted under copyright law with regard to printing, downloading, and copying. When permanent use of a resource has been licensed, a license agreement should allow the library to copy data for the purposes of preservation including the creation of a usable archival copy. Uses should include interlibrary loan. If a license agreement does



not permit the library to make a usable preservation copy, it should specify who has permanent archival responsibility for the resource and under what conditions the library may access or refer users to the archival copy. Generally, in its license agreements the library prefers ownership of content purchased over term-specified access to content that is more like a temporary lease arrangement. New licenses are approved and signed for the library by the Associate Dean of Libraries.

Decision to Purchase

Digital resources are purchased under a variety of scenarios that include selections of relatively low cost discipline-specific resources by individual subject liaisons and higher-cost or cross-disciplinary resources requiring broader review.

Lower cost discipline-specific resources: Generally available through serial subscriptions, subject liaisons may select these resources individually for purchase from their own assigned funds using the established selection criteria listed on this page, submitting orders with license and access information to the Associate Dean of Libraries. Once approved, these are forwarded to the Acquisitions Department and handled as permanent transfers from book funds to digital serials.

Higher cost or cross-disciplinary resources: Requests for higher cost (generally more than \$500) digital subscriptions are reviewed by Collections Management Group, which oversees the distribution of budget increases for these types of serials. The Collections Management Group may periodically review current higher-cost database subscriptions to identify any that are no longer needed and that could be cancelled as a means for freeing funds for new subscriptions. Requests for specialized higher-cost "monographic" digital resources, i.e., those available with one-time payments for ownership of content are also reviewed by the Collections Management Group, generally separate from database subscriptions and along with other one-time, annual big expense items, often at the end of the spending year.

Ebooks

Howard-Tilton Memorial Library has long valued the strength of its book collections and has closely followed developments within the book publishing and sales industries in both domestic and foreign markets. Thus the library in recent years has been following developments in ebook acquisitions and, as a result, has purchased more than 900,000 ebooks with records in the online catalog. To date, the library's ebooks have mostly been acquired in deeply discounted package sets or in historic book collections.

However, there are signals that the availability of ebooks as alternative format to print books does not necessarily mean that a transition like that of print to online journals will or should naturally follow. Academic ebook acquisitions present unusual problems such as those related to access, propriety formats, licensing, archival availability, and sometimes the lack of multi-user upgrades to provide for the equivalent of course reserves.

Ownership is an overarching issue with many ebooks, since without some safe assurance of ownership the library's ability to preserve ebook content for long-term access cannot be assured even after a full purchase cost is paid.

While the library considers more specific guidelines for selecting ebooks, subject liaisons should apply to



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ebook purchases the Selection Criteria for Digital Resources noted earlier in this manual. The following additional considerations are suggested:

- Ownership v. purchase of access only is a decision that should be weighed especially carefully. In other words, because of licensing issues, ebooks for now generally may be best suited as special acquisitions for works known to be primarily needed remotely or that contain content of temporary value (such as technology manuals or other works commonly superseded or regularly updated).
- Least-restrictive ebook formats (such as .pdf or .epub) on common platforms and that can be read on a relatively wide variety of devices are preferred. Common platforms are those though which the library has standing acquisitions agreements or existing licenses. For assistance, see the Head of Acquisitions in the Technical Services Division.
- The library will continue to pursue highly discounted ebooks through package purchases, and will look to support least-restrictive licenses and platforms like those from Project Muse and JSTOR.
- For now, there is no prohibition, other than cost, against purchasing either an ebook that is a duplicate of a purchased print title or a print title that is a duplicate of a purchased ebook.

From the library's Collection Development Manual (updated November 2013)