	Howard-Tilton Memorial Library **E-book Policy**	
E-book Policy Task Group: **T. Bremholm, L. DeVoe, L.** **Hooper, S. Krash, J.** **Lupkin, E. Wedig**	**Version 2.00** **Last Amendment: 02/13/2015**	**Approved by:** **Associate Dean** **Date: 2/18/2015**
	Contact officer: **Associate Dean**	**Next Review: 02/18/2018**

Contents:

Introduction

What is an e-book?

There has been a good deal of confusion over the very meaning of the term "e-book" by our users and within the library profession. Based on a user's perspective, it could include a variety of experiences of reading text on an electronic device. The *Oxford Companion to the Book* provides a definition of the term e-book that has been adopted by a number of academic institutions. It defines the tool as a book-length publication in digital form, consisting of text, images, or both, and produced on, published through, and readable on computers or other electronic devices (Gardiner & Musto, 2010, p. 164).

Why clarify an e-book policy at HTML?

There is no question of whether Howard-Tilton Library will need to manage e-book collections – as there are already hundreds of thousands already owned – but there is a real question of under which conditions and limitations we will go forward.

The uncertainty in the field of academic libraries about the usefulness, interfaces, economic models and technical specifications of e-books is palpable. While the conversion of serials acquisitions from print only to mixed print and electronic formats is presented in the literature as an accomplished fact, e-books have not gained the same overwhelming adoption in academic libraries as journals and other resource types. Despite the widespread growth of demand-driven acquisition models of e-books in the past 3-5 years, librarians have reported uneven user response and some troubling implementation and pricing developments. Howard-Tilton librarians need coherent e-book options to better serve changing user needs and expectations.

Further complicating the academic e-book landscape, e-books have different management needs than print monographs. At the root of these necessary management shifts are: different vendors supply models; ongoing maintenance requirements for dynamic digital formats; and shifts in user needs and access patterns directed by the variety of technologies.

This state-of-affairs challenges us to devise a set of local practices that will clarify the decision-making roles of selectors communally and individually and to coordinate actions of collection developers with reasonable and preferred technical services workflows.

Purpose of this policy statement

The E-book Task Group has responded to a call to develop a set of general guidelines for selection and acquisition of e-books for the HTML general collections. Specifically, the goal is to outline how and under what conditions e-books should be acquired for our users while broadly addressing issues that include but are not limited to usability, licensing, archiving, perpetual access, and the advisable use or nonuse of purchase options such as Demand Driven Acquisition (hereafter DDA).

Notes on e-books as they relate to HTML's collecting goals

Although some institutions are using e-books and particularly DDA as a way to accommodate reduced funding streams while still offering their patrons some access to current scholarly works, Tulane's e-book strategy does not have saving money as its goal at this time. Tulane conceives of e-books in terms of enhancing access in tandem with print acquisitions.

Tulane, while benefiting from productive relationships in with LOUIS, does not currently have applicable consortial relationships that would allow coordinated purchasing of monographs in print or electronic formats. Consortia leasing models, such assometimes called "Non-Linear Lending," which allows for purchasing temporary access to a given number of uses, do not fit within Tulane's continuing commitment to build permanent collections.

While inevitably the adoption of e-book practices would introduce changes to some technical services workflow, Tulane's e-book strategy does not significantly alter the role of the subject liaison/subject bibliographer/book selector. The selection of e-books is not envisioned as a method of reducing demands on stack space.

Howard-Tilton already takes steps to make our e-books, including titles within larger packages, visible to our users through our discovery services. Librarians could extend existing programs to make users more comfortable with them. This might include more actively marketing e-books on the library's website, blogs, and Libguides, as well as in public programs and presentations.

Envisioning other options?

The e-book task group recognizes that the universe of options currently in front of us is dynamic and constantly changing. We are not currently under pressure to expand our e-book collections, and purchases of e-books among selectors are an increasing but still quite small proportion of overall book purchases. Many of the available products do not meet the standards and goals outlined in this document. Therefore, we can play a part in advocating for better options (e.g., vendor models, vendor workflows, pricing models, user interfaces, preservation methods, etc.). Library consortiums have started to more efficiently negotiate costs, licensing agreements, and preservation models. There may be ways to engage more productively with vendors in such arrangements (Beisler & Kurt, 2012), to cut out the middle man and maintain university-based e-book servers (Feldman, Russell & Wolven, 2013), or devise ways to promote wider access to information through open access book projects (Stachokas, 2012). Such projects include Knowledge Unlatched (http://www.knowledgeunlatched.org/) and the Lever Initiative of the Oberlin Group (http://leverinitiative.wordpress.com/).

As HTML bibliographers go forward in their consideration of the evolving landscape of e-books, it is vital that they take a balanced approach. This policy tends to emphasize a largely conservative view of the subject and the potential pitfalls of adopting e-books, but we also have to consider the consequences of not acting. Even if many current e-books do not meet our standards, our patrons will seek electronic

content with or without us and their absence in the collection may present an undue burden in some cases (Lopatovska et al., 2014).

Part I – The Current E-book environment

A. The general landscape

1. Literature Review

As of the fall of 2014, little consensus has arisen in library and other literature on the usage and perception of e-books. While a full examination of the user studies regarding e-books in varied academic contexts and diverse user groups, is beyond the scope of this report, it is useful to consider that studies over a ten year period reflect the confused situation that we face today.   In late 2013, our task group surveyed recent literature on the usage and perception of e-books. Surveys of academic library users indicate they have not yet fully embraced the format, while librarian frustration with the evolving e-book market was impeding the wider adoption of e-books in academic libraries. Tulane's policy statement also benefited from wider reviews of literature by policy study initiatives at other institutions including Columbia and Yale, which can be consulted online, and from reports from the Lever Initiative about Open Access book initiatives (The Oberlin Group).

User perspectives

A 2009 survey of faculty, staff, and students found that 57% of respondents had used e-books, but comments suggested that many users had used them without being aware that they had used an e-book, or conflated e-books and e-journals (Shelburne 2009). Several respondents were unsure how to find or access e-books from the library. There seemed to be confusion as to whether librarians and the academic community defined e-books in the same way.

If one looks back a decade, a survey of undergraduates at a small liberal arts college found that only 39% had used e-books, 89% would use an e-book if that were the only format available, and 66% preferred print over electronic books (Gregory 2008). Although much has changed since 2004, a 2011 survey of graduate students and faculty found that just 38% had used e-books (Cassidy, et al. 2012). Those who had used them were nearly equally divided between those who preferred printed books, those who preferred e-books, and those who had no preference or whose preference depended on the book. Among all respondents, only 11% had both used e-books and preferred them over printed books. Those users were more likely to own an e-reader device than other respondents. The authors concluded that users who disliked e-books were either responding to legitimate shortcomings of the products or were uninformed of the features available, and that many users preferred print, but used e-books for convenience.

Librarian perspectives

A study by JISC (2012) found that e-books are not currently replacing the demand for print books despite the fact that e –journals have replaced back copies of printed journals (JISC, 2012). The same study also cautioned, however, that as more materials appear only in digital format there may not be a viable print equivalent. Another study conducted by the E-Books Strategic Plan Task Force at Yale University Library (2013) found instances that the adoption of e-books across library systems is uneven, particularly as they sometimes appear significantly later than their print counterparts.

The 2012 annual survey of academic libraries found that 95% of libraries offered e-books (Anonymous 2012). Those that did not cited the lack of demand and the instability of the market. The number of e-books offered by libraries increased by 41% over the 2011 survey, and by 200% over the previous two years. Over two thirds of libraries that offered e-books had seen an increase in demand over the previous year, although the rate of growth may be slowing compared to previous years. Overall, academic libraries in the survey spent an average of 10% of their acquisitions budgets on e-books. User-driven acquisition of e-books was up from 16% of libraries two years before, to 31% reporting patron-driven acquisitions in 2012. Overall, the survey found that the high cost of e-books was the primary issue of concern to librarians.

A 2009 survey of librarians found that many academic librarians were frustrated in their attempts to acquire and manage e-books the way they had with printed books (Anson & Connell 2009). While they were adapting collection development policies and workflows to deal with e-books, the evolving market required greater scrutiny and consideration of licensing, archiving, and pricing models. The survey found that, often, the decision to acquire an e-book was determined by those factors more than by the content of the book.

After a review of the history of e-books, and remarks about the relatively slow pace of e-books acquisitions, Connaway & Wicht (2007) identified several barriers to the adoption of e-books by librarians. Those included lack of standards and a lack of hardware in the era before Nook and Kindle e-book readers, multiple platforms, access problems caused by digital rights management, and unrealistic models for pricing and access.

Interviews with librarians indicated that most libraries incorporated e-books within their overall collection development policies rather than writing separate e-book policies (Vasileiou 2012). They also tended to budget for e-books within existing allocations rather than creating a separate e-books fund. Most also indicated that spending on e-books was increasing and was expected to continue growing, although budget cuts and limited selection of e-books reigned in their spending. The lack of availability of titles in the e-book format was compounded by the lack of centralized tools, comparable to those available for printed books, adding poor discoverability to the list of issues hampering e-book acquisition. Content was often secondary to the sales models, licensing, and costs in determining acquisition. All of the libraries incorporated e-book records into the OPAC, but noted problems with the

delivery and quality of MARC records supplied by the vendors, leading to inconsistent or unreliable access. While many respondents recognized the importance of marketing and promoting e-books, they varied in their own level of participation, in some cases noting the need for word-of-mouth to make users aware.

Courant & Nelson (2010) found that the costs to store a printed book are higher than the cost to store an e-book. That is particularly true given the value of real estate on campus. Costs to store print are higher when access is provided, meaning it may be cheaper to keep the print books in secure storage and use a digital copy for access.

Schell (2011) offered enthusiastic praise for e-books, calling them, "an unstoppable force." The author suggested that emphasizing the value of just-in-time collecting, rather than a just-in-case collecting, could be helpful in generating support for e-books.

The view of library directors and deans interviewed in the Ithaka 2013 S&R Report was moderate in its assessment of rapid escalation of e-book adoption, pointing to relatively small projected increases in e-book spending. (Figure 25, p. 44). Some faculty enthusiasm for format change in books, according to the survey, surpassed that of library directors.

Walters (2013b) concludes that publisher-initiated limitations on usage and sharing of e-books were preventing librarians from enthusiastically embracing the technology. Those limitations took the form of digital rights management and overly restrictive licensing, and through more subtle features of interface design intended to frustrate or intimidate users into self-regulating their use. The author advises librarians to exert their power through purchase decisions, lest their compliant acceptance of unreasonable restrictions be seen by publishers, and users, as consent.

2. Survey Review

*In*t*roduction*

During the months of September and October, 2013, the E-Book Task Group developed and distributed a survey to Tulane University affiliates. The survey was made available on the Library's homepage and was distributed to faculty via email communications by Library Liaisons.

The survey had only 27 respondents that included freshman/sophomore (1), junior/senior (6), graduate students (6), faculty members (4), staff/administrators (3), librarians/library staff (6), and postdocs (1). Respondents associated themselves with the School of Continuing Studies and Summer School (1), School of Law (1), School of Liberal Arts (7), School of Public Health and Tropical Medicine (3), School of Science & Engineering (5), School of Medicine (3), and other (3). Four respondents did not associate themselves with a school. Although the number of responses is too small to produce meaningful quantitative data, the survey did yield qualitative information that may inform further investigations for policy setting. The survey also suggested that for purposes of future outreach, it would be necessarily to

very clearly define the difference between academic e-books as provided by the library and those they might encounter in other settings (e.g., Nook, Kindle, GooglePlay).

Barriers & Gateways to Use

Accessibility

Qualitative information gathered through this survey suggests that accessibility may be a major barrier to use for some Tulane affiliates. The survey prompt "I would use e-books if..." produced fairly consistent responses, best represented by the response "I would use e-books if I knew more about their availability/existence and how to access them." Advocacy for improved interfaces may have some future benefit. A more immediate solution, however, may take the form of tutorials made available at the point of need.

Promotion

Responses to this prompt also indicate that e-book collection use may benefit from stronger promotion to increase awareness. Soft-selling the e-book collection through posters in the entryway and appropriate locations coupled with social media pushes and reminders made by Library Liaisons may go some way to increasing awareness of the e-book collection.

Features

Certain features of the e-book platform also influence the user experience and users' decision to access additional e-books. We asked our respondents to make multiple selections from a list of e-book features they like and a list of features they do not like. Notably, the selections are likely influenced by the academic role of the respondents (e.g. undergraduate or faculty) and our data therefore cannot be considered conclusive. At best, it may be indicative of a few key features that should be expected of e-book platforms and others that warrant further investigation.

Features that appear to contribute to a *positive* user experience included: ability to search within the text (selected by 18 respondents); portability (18); convenience of accessing any time and any place (15); e-books save paper (9); ability to annotate, bookmark, or make notes (8; ability to read on a mobile device, e.g. iPhone, Blackberry (8); ability to read on a dedicated e-book reader, e.g. Kindle, Sony Reader (8). Additional features that seem less important to a positive e-book experience included: ability to adjust screen for visibility (6);ability to download chapters or portions of the e-book to computer or laptop for later use (6); ability to copy and paste into other documents (5); ability to print (3); ability to link to a particular chapter (3).

Features that may to contribute to a *negative* user experience included: limits on simultaneous users (8); doesn't permit downloading to a device, which means it requires an internet connection and loads each page one at a time (8); method of annotating is clunky or unsuited to my needs (7).

Several additional features that appear less influential but *may nonetheless contribute to a negative experience* for some users include: technical problems (6); hard to make a copy (6); can't read offline (6); don't like extended reading on a computer screen (6); ability to highlight or take notes on the printed page (5); too many distractions when working online (5); being tied to a computer or device battery lifetime (4); hard to browse (3); too many file formats (2); reading comprehension is difficult (2); the user interface (2).

B. Current Acquisitions Practices

1. Sources of funding

The following list provides details of HTML Acquisitions summary funds. Individual subject reporting funds are held under each summary fund listed. Each fund may be appropriate for e-book purchases

Approvals summary fund

Approval funds are spent on materials supplied under existing plan agreements that have been established with library vendors. Materials supplied under these funds meet parameters set forth by bibliographers that can include subject, classification, publisher and more. Funding is provided at the beginning of each fiscal year and is based on an increase over last-year's budget. The amount allocated for each plan is communicated to the vendor prior to the beginning of the fiscal year. When one plan needs increased funding, the amount is moved from another approval plan.

Books summary fund

Book funds are spent for one-time purchases of materials that are acquired as firm orders from various domestic and international vendors and publishers. Funding is provided at the beginning of each fiscal year and is based on an increase over last-year's budget. When one fund needs increased funding, the amount is moved from another book fund.

Serials summary fund

This fund covers digital and print subscription orders. Subscription orders are those that are paid on a calendar year (or other annual basis). Payment is made before the subscription start date. Funding is provided at the beginning of each fiscal year and is based on an increase over last-year's budget. New subscriptions are funded by moving the amount of the first year's subscription from the corresponding book fund as a permanent transfer.

Standing Orders summary fund

This fund covers digital and print standing orders. Standing orders differ from subscription orders (paid for with Serials funds) in that billing occurs at the time a volume is sent to the library. Funding is provided at the beginning of each fiscal year and is based on an increase over last-year's budget. New standing orders are funded by moving the amount of the first year's subscription from the corresponding book fund as a permanent transfer.

Big Tickets summary fund

Funds are set aside near the end of the fiscal year to cover large purchases. These funds can come from any of the above funds that are projected to have a surplus at the end of the fiscal year. The Associate Dean in consultation with the Director of Technical Services determine the amount available for big ticket purchases. Bibliographers then submit requests to the appropriate Chief Bibliographer for their fund(s), who then reviews requests and submits requests to the Collection Management Group for further review and selection.

2. Current E-books by Purchasing Model

As of February 23, 2015, the Library currently provides access to e-books by the following approaches:

- ***Outright Package purchase****:* Springer, Project Muse, Morgan Claypool, EEBO/European Books Online
- ***Contract for individual selection****:* Ebrary, JSTOR, Oxford, Wiley, EBSCONet, Project Muse, ScienceDirect
- ***Open access resources****:* HTML is considering its relationship with emerging open access models. Bibliographers wishing to facilitate discovery of open access resources through HTML systems should consult with Electronic Resource Management.

Part II – Determining Needs & Use

A. Stakeholder Discussions

While effective communication with stakeholders is crucial to any collection development strategy, the unclear situation of e-books makes this especially true. Because selection or acquisition of a given title or package via HTML may be impossible due to a number of factors at some point in the predicted lifecycle of the product, liaison librarians should ideally consult with the Head of Acquisitions or the Collections Management Group prior to promoting a product with unknown characteristics.

In many ways, selection for e-books will follow best practices for selection already explored at greater length in "General Selection Considerations" in Howard-Tilton's Collection Development Manual. Expected criteria for selection include faculty requests for e-books to be available on Blackboard, response to vendor announcements of new products that could enhance curricular outreach, and analysis of usage data of content currently held in physical media.

B. Circulation & Use of Physical Collections

Understanding how the physical collection is used can provide insight into subject areas worth expanding in the digital realm as well as titles that would better serve patron needs in electronic, rather than physical, formats.

Circulation Statistics

Usage statistics may be helpful in deciding which format to buy. Some, but not all, usage statistics may be available in HTML's collections systems. Collections Group <u>documentation</u> should contain the most recent data. Additionally, the Voyager Circulation Module may provide to usage figures for individual print titles since 1999; heavy usage of a title of a title may provide additional context.

Part III – Information & Recommendations

A. General Characteristics

HTML emphasizes acquisitions of collections that are stable, archivable, and accessible. In general, individual titles with long-term value in core subject areas should still be selected in print for preservation purposes.

- **Stable/Perpetual**
  Stability is defined as purchased collections with a reasonable expectation of continuing access. Selectors should avoid authorizing resources with year-to-year subscription access. Similarly, purchase options with a predetermined number of total rentals (also described as "non-linear lending" by some vendors) are not sanctioned at this time.

- **Archivable**
  Archivability means collections with license provisions for perpetual access and allowing for the owner (HTML) to store the e-books in the collection either on its own through an secure server or with an access-controlled third-party cooperative.

- **Accessible**
  Accessibility means that individual titles must have suitable records that are discoverable in the library discovery platforms. E-books should be compatible with HTML's technical infrastructure, including our proxy service and link resolver. Full-text searchable e-books are preferred to those only with MARC records. Publishers must make reasonable allowance for assistive technology to keep Tulane compliant with ADA and other legislation. and discovery platform.   E-book purchases should be limited to an accessible format that can be read on a relatively wide variety of devices. E-book standards and recommended practices are evolving and we suggest close monitoring going forward. Please see Appendix A for further discussion of the current landscape.

B. Single versus multiple use

E-book purchases may be licensed for single or multiple use. Some platforms, (Ebrary, EBSCO), may offer a choice of multiple options at different price points depending on the specific publisher arrangements for that title. Other platforms, such as Project Muse and Springer, tend to be multiple use across the platform. The ultimate decision will be made by individual subject liaisons, but best practices

would indicate a choice that would demonstrably expand access for patrons. Factors to consider should include:

- Anticipated use
- Departmental needs and preferences
- Financial platforms
- Platforms and usability

Comparison print holdings

At this time, there is no prohibition, other than cost, against purchasing either an e-book that is a duplicate of a purchased print title or a print title that is a duplicate of a purchased e-book.

C. Considerations for E-book Packages

E-book packages are by nature "big ticket," large expense purchases that are recommended by bibliographers and/or subject liaisons and approved by the Collections Management Group.

D. Considerations for Individual e-book purchases

Platforms/sources

Bibliographers and Subject Liaisons are free to select individual titles in e-book formats from common sources with existing licensing arrangements and procedures established in Acquisitions, Cataloging, and Electronic Resources Management (ERM). Examples include the Ebrary and EBSCOhost titles available for selection in GOBI at time of writing, although these and other platforms have limitations in licensing. New platforms require review by the Head of Acquisitions.

Recommended scenarios

In most cases, decisions to adopt an e-book will follow the general criteria mentioned in the "Selection Tools" and "General Selection Considerations" in the Howard-Tilton Collection Development Manual.

Bibliographers may consider ordering an individual e-book, either instead of a print volume or as a supplement if funds permit, under variables such as the following:

- *Predicted obsolescence of content*.   E-book purchases may be appropriate for ephemeral content likely to be quickly outdated, and whose long-term ownership and preservation is not believed to be crucial.
- *Requested use by groups under a multiuser license.* For a purpose directly related to a curricular need, bibliographers may consider faculty requests for an e-book purchase on a multi-user license. Such a purchase should be based on a demonstrated need for access, and should not place the library in the role of providing class textbooks. If the content is of compelling and permanent value for HTML collections, bibliographers should consider a supplementary print purchase.

- *Titles needed for remote use.* Although most Tulane classes are not based on distance learning, such occasions can arise (i.e., in Social Work) and justify consideration of e-books. Such a purchasing plan should arise from expressed student/faculty needs.

E. E-books in approval plans

HTML has e-book-preferred approvals from YBP in highly specific subject areas that reflect strong expressed user preference. Selectors wishing to explore this option should consult with the Collections Management Group.

F. Demand Driven Acquisition

DDA exists in limited subjects funded in FY 2015 and may or may not continue as a supported option at HTML. The program requires annual review for content and financial adjustments as needed.

1. Rationale

E-book DDA at Tulane facilitates rapid access and discovery of materials in emerging fields.

2. Structure of HTML's DDA plans

Each bibliographer considering DDA should establish the parameters of the plan in coordination with the Collections Management Group.

Once a profile is established, e-books that match the plan profile will be selected for inclusion in DDA. Once selected, title notification will be sent to the e-book platform provider so that access can be enabled, and discovery records for those titles will be sent to the library on a weekly basis. Technical Services staff will be responsible for loading discovery records into the catalog, which then will generate a load into the discovery service. Trigger events as defined by the DDA vendor will initiate a purchase. Purchase/invoice records will be transmitted to the library on a weekly basis, and will be processed by Technical Services staff. Purchase/invoice MARC records will overlay discovery records in library systems. Technical Services staff will manage all discovery records, to include deleting records that are pulled out of the DDA plan.

Initially, a retro load of titles/discovery records that match the parameters of the plan may be added to DDA and the library catalog, to provide a larger pool of available titles. Additionally, bibliographers may move titles into the DDA program, or remove titles, by notifying the Head of Acquisitions.

3. Billing/Spending

Although allowing some decisions to occur at the level of individual bibliographers, DDA would require communal discipline. Bibliographers need to inform the Collections Management Group by May 1 of their intention to participate in DDA programming for the next fiscal year. The Collections Management Group will assess needs and allocate funding.

4. Record retention

While it is common for libraries to inaugurate DDA plans without any plans to remove records of titles not purchased, the E-book task group recommends a general policy of limited retention for at least 5-10 years with a defined exit strategy.

5. Workflow projections

Please see Appendix B, below.

G. Timetable:

Given ongoing changes in e-book publishing platforms, the E-book Task Group recommends that this policy document be revisited within 3 years.

Appendix A: Literature Cited

Anonymous. 2012. "E-book Usage in U.S. Academic Libraries. Third Annual Survey." *Library Journal*. 2012. Accessed December 4, 2013.
http://www.library.arkansas.gov/PublicLibraryServices/Documents/E-book-Usage-Report-Academic.pdf

Anson, Catherine and Ruth R. Connell. 2009. *ARL SPEC Kit 313: E-book Collections*. October 2009. http://publications.arl.org/E-book-Collections-SPEC-Kit-313/.

Cassidy, Erin Dorris, Michelle Martinez and Lisa Shen. 2012. "Not in Love, or Not in the Know? Graduate Student and Faculty Use (and Non-Use) of E-Books." *Journal of Academic Librarianship*. Volume 38, Issue 6, November 2012, pp. 326–332.

Connaway, Lynn Silipigni and Heather L. Wicht. 2007. "What Happened to the E-book Revolution?: The Gradual Integration of E-books into Academic Libraries." *Journal of Electronic Publishing*. Volume 10, Issue 3, Fall 2007. DOI: http://dx.doi.org/10.3998/3336451.0010.302

Courant, Paul N. and Matthew Nielsen. 2010. "On the Cost of Keeping a Book," in *The Idea of Order: Transforming Research Collections for 21st Century Scholarship*. CLIR Publication No. 147. Council on Library and Information Resources. Washington, D.C. June 2010.
http://www.clir.org/pubs/abstract/reports/pub147

Columbia University Libraries. 2013. E-book Program Development Study: Quarterly Report June 1-August 31, 2013. New York: Columbia University Libraries, 2013. Retrieved from
http://hdl.handle.net/10022/AC:P:21869

Feldman, S., Russell, C., & Wolven, R. 2013. E-book Business Models for Public Libraries: A Response to Publisher-Library differences. In D. Bogart (Ed.), *Library and Book Trade Almanac* (pp. 3-18). Medford: Information Today, Inc.

Gardiner, E., & Musto, R.G. 2010. The Electronic Book. In M. F. Suarez (Ed.), *The Oxford Companion to the Book* (pp. 164 – X). Oxford: Oxford University Press.

Gregory, Cynthia L. 2008. ""But I Want a Real Book": An Investigation of Undergraduates' Usage and Attitudes toward Electronic Books." *Reference & User Services Quarterly*. Spring 2008, Vol. 47 Issue 3, p266-273.

JISC. 2012. *Preparing for Effective Adoption and Use of E-books in Education*. Retrieved from http://blog.observatory.jisc.ac.uk/techwatch-reports/e-books-in-education/

Long, M. P., & Schonfeld, R. 2014. *Ithaka S&R US Library Survey 2013*. New York: Ithaka S&R. Retrieved from http://www.sr.ithaka.org/sites/default/files/reports/SR_LibraryReport_20140310_0.pdf

Lopatovska, Irene et al. 2013. "E-Books in Academia: Expectations and Challenges." iConference 2013 Proceedings. Ed. Linda Schamber. Retrieved from http://hdl.handle.net/2142/42563. doi:10.9776/13010.

Lopatovska, Irene et al. 2014. "In Transition: Academic E-Book Reading in an Institution without E-Books." *Library Review* 63.4/5 (2014): 261–275. Retrieved from emeraldinsight.com. Web. 21 Nov. 2014.

Schell, Lindsey. 2011. "The academic library e-book," in *No Shelf Required E-Books in Libraries*. Sue Polanka. Chicago: American Library Association.

Shelburne, Wendy Allen. 2009. "E-book usage in an academic library: User attitudes and behaviors." *Library Collections, Acquisitions, and Technical Services*. Volume 33, Issues 2–3, 2009, pp. 59–72.

Stachokas, G. 2012. Looking ahead from now to 2012. In R.O. Weir (Ed.), *Managing Electronic Resources* (pp. 137-148). Chicago: American Library Association.

Vasileiou,Magdalini, Jennifer Rowley, and Richard Hartley. 2012. "The e-book management framework: The management of e-books in academic libraries and its challenges." *Library & Information Science Research*, Volume 34, Issue 4, October 2012, pp. 282–291. http://dx.doi.org/10.1016/j.lisr.2012.06.005

Walters, William H. 2013a. "E-books in Academic Libraries: Challenges for Acquisition and Collection Management." *portal: Libraries and the Academy*. Volume 13, Number 2, April 2013a. pp. 187-211 | DOI: 10.1353/pla.2013.0012

Walters, William H. 2013b. "E-books in academic libraries: Challenges for sharing and use." *Journal of Librarianship and Information Science* published online 10 January 2013. Accessed December 4, 2013. http://lis.sagepub.com/content/early/2013/05/08/0961000612470279

Yale University Library. 2013. The e-book Strategic Plan Task Force. Retrieved from http://www.library.yale.edu/departments/collection-development/Yale-e-book-task-force-rpt.pdf

Appendix B: Standards

http://e-bookshtml.pbworks.com/w/page/68486117/Standards%20Review

Appendix C: Workflows

http://e-bookshtml.pbworks.com/w/page/73069907/Workflow%20Overview