

Collection Development @Woodruff Library

Prepared by: Chris Palazzolo, Head of Collections

Approved by CM: June 2018

Revision Cycle: 3 Years

Most Recent Version: 12 June 2018

Collections Policy Overview

The development, curation, and stewardship of research collections are integral services that the academic library provides to its students, faculty and staff in pursuit of their pedagogical and research needs. Woodruff Library's collection development policy allows for sufficient flexibility so as to adapt to the ever-changing scholarly communication ecosystem (and the new types of content it produces), while providing guidance in making collection decisions that reflect the teaching and research requirements of the Emory community.

Purpose and Foundational Principles

The purpose of this policy is to outline and define the best practices for building and maintaining library collections in all formats at Woodruff Library at Emory University. There are more specific and detailed policies and best practices for the acceptance of gifts, research data, streaming video, open access collection support and onsite/offsite collection decision-making included as appendices to this more general document.

For the vast majority of collections, we collect at the R4 collection level (Research)—“A collection which includes the major source materials required for dissertations and independent research, including materials containing research reporting, new findings, scientific experimental results, and other information useful to researchers. It also includes all important reference works and a wide selection of specialized monographs, as well as a very extensive collection of journals and major indexing and abstracting services in this field.”

This policy explicitly calls out collaborative collection efforts, both print and digital, with other Emory libraries, as well as the digitization, preservation and dissemination of our digital collections. Emory Libraries' print and digital collection and preservation efforts are designed to ensure long-term access to an increasing volume of materials that have intellectual significance and long-term value, and to deliver digital collections in an environment that allows for ease of searching, browsing, retrieval, and reuse. A more detailed set of policies that outline Emory's digital collections can be found [here](#).

Subject librarians have also established individual discipline/department policies that provide more detailed and nuanced accounts of collection practices, including new and emerging areas of scholarship, preferences for print and electronic resources, and research methods and trends.

Designated Communities

The primary audience/community for Emory's Woodruff Library collection building efforts comprises the students, faculty, and staff of the university who are engaged in teaching, research, and service at the university. The secondary audience/community is defined as those individuals or institutions that possess some defined affiliation with Emory, include ARCHE institutions. Although these individuals may have some borrowing privileges, they are not a primary driver for collection development.

Principles

First and foremost, there are certain principles, approved by subject librarians in early 2016, that inform the work of collection-building and management at Emory. These are:

- Develop, steward and sustain access to diverse collections that support research and learning at Emory
- Maintain and deepen assessment for our print and electronic collections to support deliberate collection decision-making
- Collaborate with the Emory community to make informed decisions regarding the purchasing and management of electronic and physical collections
- Remain flexible to support new and developing areas of research
- Support and maintain the balance between electronic and print resources in light of faculty and student preference
- Appreciate the demands placed on essential and integral support infrastructure in technical services (acquisitions, metadata, and electronic and continuing resources)
- Support financially open access initiatives, both locally and (inter)nationally.
- Facilitate and leverage access to other local Emory collections, as well as to other peer institutions and partnerships with national organizations and collaborative initiatives (e.g., print retention agreements and joint e-purchasing)
- Provide input to other library groups that provide virtual and physical access to our collections (i.e., Access and Core Services)
- Collect and curate collections in a variety of formats that reflect the transnational, interdisciplinary, and cross-cultural approaches of the academic departments/programs at Emory University
- Foster the acquisition of resources that address otherwise unarchived histories and underrepresented groups, on the grounds that capturing diverse points of view creates more complex and unbiased collections.

Language, Chronology, Geographic Coverage

Formats and Publication Type

Print Materials (Monographs, Reference Materials)

There is no explicit preference for print over e-books, although there is a preference for the acquisition of reference materials to be purchased in digital format as they tend to lend themselves better to the digital environment. Certain subject areas have become de facto more e-book oriented (e.g., such as the Sciences), and the collection in these disciplines reflects these changes in scholarly communication and dissemination.

Languages

The collection has significant strengths in a number of foreign languages, including both Roman (French, Italian, German, Spanish, Portuguese) and non-Roman languages (Arabic, Chinese, Japanese, Hindi, Korean, Russian, and Hebrew). These collections are meant, in particular, to support the interdisciplinary needs of Emory's numerous area studies programs as well as the ethnic diversity of the student and faculty body.

Duplication

In general, Woodruff Library does not purchase multiple copies of materials, although, print and electronic format of the same title may be acquired to meet demand and/or patron preference. In addition, there may be instances in which some format duplication is acceptable, or de-duplication not completely feasible. For example, duplicates of titles may be added if part of an important donor gift. We do not purchase translations of popular titles already in the collection, unless these are significant important works from the source language to English.

Criteria and Considerations for Purchase of Electronic Material

There are a number of general criteria that Woodruff Library uses in assessing digital content for purchase: (1) cost, (2) uniqueness of content/duplication of content elsewhere, (3) authoritativeness, (4) relationship with print holdings, (5) quality of interface and content display, (6) accessibility (e.g., availability of MARC records), (7) availability of robust usage statistics, (8) IP-authentication and EZ-Proxy functionality, (9) use of content (limitations on printing, viewing, and downloading should be minimized), and (10) Interlibrary lending. Consortial licenses, such as NERL, are highly preferable to achieve better business and legal terms.

In particular, Woodruff Library focuses heavily on the acquisition of unique digital primary resource to support research and teaching in numerous disciplines. A concerted effort is made to replace old formats (e.g., microforms) with more accessible and searchable digital primary collections.

Journals

E-journals are preferred over print, provided that the publisher meets the criteria as set up by the Moving Beyond Paper initiative, started in 2007 ranging from whether content online meets or exceeds that in print and archival rights which grant perpetual access to the volumes/years subscribed. In making recommendations library staff also have taken into consideration the usage of the journal or book (both in print and electronic formats) and the usability of the content. We have significantly reduced our print subscription content, but realize that some existing subscriptions may or should not be able to be transferred to e-only due to availability of licenses, lack of archival rights, subscription purchase models, and/or preference of content use.

Backfiles for existing print archives are encouraged for purchase to provide better accessibility of journal content, even when this content exists in print form in the library's Library Service Center. Rather than deaccession print journals, preference is to move these to the shared Library Service Center. Per LSC policies, duplication with existing print runs at LSC should be minimized.

AV and Streaming Video

Woodruff Library supports both physical and streaming video content. Preference for streaming video is third party hosting, where possible. Different use scenarios exist for the use of streaming video over physical media. The appendix on streaming video preferences (Appendix 5) addresses these scenarios. The Music and Media Library actively reviews content held in older formats for replacement with newer formats and/or streaming.

E-Books

There is no preference for e-books over print titles. There is, however, a preference for e-book titles without digital rights management (DRM), with the caveat that not all titles can be purchased without DRM. *If a non-DRM copy is unavailable then the best option is unlimited simultaneous user access.* Woodruff Library actively replaces restricted aggregator e-book content with non-DRM content where possible. Subject librarians have latitude on purchasing e over print copies, based on their knowledge of their discipline's or individual faculty member's preference or intended use of the title. With that said, the library does manage several demand-driven programs and evidence-based programs and plans for e-book content, so as to increase available content that is not purchased by librarians or received as part of the approval plan.

E-Book packages are purchased on a one-off basis, but preference is not to significantly duplicate content. Preference is also that packages be purchased through the approval vendor, where possible, to manage duplication and cost. In addition, if possible, the library favors the additional ability to purchase one-off titles through the approval vendor.

For more detailed guidance on e-book purchasing, please see Appendix 5.

Other Materials (Government Documents, Data, Specialized Software)

Data: Woodruff Library actively purchases data resources (individual datasets or aggregated data sources) to support quantitative research in the social sciences. Due to the

inherent issues of cost, management and licensing, a separate policy is in place to guide the selection and acquisition of data resources. In addition to social science datasets, Woodruff Library supports the accessioning of primary source collections' raw content the purpose of text mining and/or natural language processing. The preferred method for accession is physical hard drives in lieu of a cloud-based method.

Rare Physical Items: Woodruff Library does acquire some rare and unique materials, often in concert with the Rose Library, to complete notable sets and collection strengths, particularly in Classics and Renaissance Art. Digitization of these collections is highly recommended.

Textbooks: Woodruff Library does not acquire, in general, textbooks. However, subject librarians may opt to purchase textbooks in their respective areas for housing in the Stacks or in Course Reserves.

Offsite/Onsite Collection Policy

Please see **Appendix 1** for a description and outline of Woodruff Library's current onsite/offsite policy.

Methods of Acquisition

Woodruff Library acquires the vast majority of print materials by way of numerous approval plans, of which YBP is the primary for English language materials. Foreign language approval plans are managed and profiled by relevant area studies subject librarians, and where appropriate by some other librarians. These approval plans are frequently revisited and assessed to ensure that needed research and teaching materials are acquired efficiently and cost effectively. In addition, Woodruff Library supports acquisition of materials through book fairs and other literary marketplaces to add to our foreign language collections. These avenues of acquisition can be invaluable for identifying and acquiring hard to find titles, titles with limited runs and/or distribution. In addition to library mediated and generated-purchases via firm orders, the library participates in several demand-driven plans and evidence based acquisition plans for e-books, streaming video and scores. For audiovisual materials, we also depend on several media approval plans, as well as streaming video aggregators, such as Kanopy.

Collaborative Collection Building

The Woodruff Library actively collaborates with other libraries on campus to build and significant subject collections. Notable collaborations are with Health Sciences, in developing and managing a robust Life Sciences collection, the Rose Manuscript, Archives and Rare Book Library in expanding archival and rare book collections in relevant areas (in particular, Art History, US History, African American Studies and English Literature) and Pitts Theology Library (Religion). In addition, Woodruff Library also looks for opportunities to build and manage collaborative collections where appropriate with libraries outside of Emory, e.g., with its LSC partner, Georgia Tech, and with UGA (Latin American Studies). Woodruff Library participates in the Cross-Libraries Working Group to review, manage, and assess cross-library collection needs and initiatives (both print and digital) and the common good budgets. In addition, Woodruff Library participates in cross-national print

preservation initiatives, including, but not limited to the Hathi Trust Shared Print Initiative and the ASERL Scholar's Trust. Emory also contributes to wider digital collections available on a number of third party platforms such as HathiTrust, Digital Library of Georgia and the Medical Heritage Library. Finally, Emory is a CRL member and contributes regularly to joint purchasing programs.

Preservation of Materials (Physical and Digital)

Physical Preservation

Frequently circulated materials that are identified as damaged, but not brittle, are typically rebound. Preservation routes brittle items to Collection Management for review by subject librarians. There are several options for disposition of said items (dependent on the publication of the material, market availability, and prior digitization), including the acquisition of replacement copies, digitization, and/or catalog enhancement via links to online repositories such as HathiTrust.

Digital Preservation

Emory is a member of both Portico and CLOCKSS, which provide archival access to a significant corpus of digital content (including e-books, e-journals, and primary source documents) to which we have perpetual ownership granted by the vendor license. Preservation of local digital content (born-digital and digitized) is governed by the Digital Preservation Policy, approved by the Digital Collections Steering Committee and the Emory Library Cabinet.

Assessment

Assessment of Woodruff's print and digital collections is an integral element of Collection Management. Such evaluation provides subject librarians and collection managers essential insight into the nature and use of our materials, and ensures that we are effective stewards of collection funds. Assessment takes on a number of related forms:

- COUNTER statistics, including turnaway data
- Print analyses of circulation, including in-house use
- EZProxy statistics (more granular data than COUNTER)
- Interlibrary Loan statistics
- Cost-per-use
- Survey and Focus Group data
- Departmental knowledge and expertise from the subject liaison

Digitization and Digital Preservation

The library is committed to making its unique, rare and historical material accessible to its patrons and to the greater public and scholarly community, as well to ensuring that long-term

preservation and support of Emory Libraries' digital content is maintained. Selection for materials for digitation and/or is based on traditional collection development principles including authority, originality, curricular and research relevance, timeliness, breadth and/or depth of coverage, demand, and support of Emory's distinctive collections.

Materials included in the Emory Preservation Repository are evaluated for broad and enduring value. Added value components to be considered include (a) degree of integration in an online environment, (b) intellectual control (metadata), (c) improvement of resource sharing, (d) advancement of collaboration, (e) enhancement of access, (f) intrinsic research value, and (g) rarity or uniqueness of assets/contents

Separate and more detailed policies outlining criteria and principles for preservation and digitization of both our print and born-digital collections are available **as appendices** to this policy.

Appendix 1:

Onsite and Offsite Collection Policy (LSC)

Prepared by: Chris Palazzolo, Chuck Spornick, Amy Boucher

Revision Cycle: 3 Years

Last Update: April 2018

Next Update: January 2019

Most Recent Version: 22 February 2018

Woodruff Library aims to provide patrons with a robust and well managed print collection, both offsite and onsite. To accommodate the growth of physical collections, the library must frequently systematically identify books and serials that are infrequently accessed and transfer them to off-site storage at the Library Service Center (LSC). In doing so, the library deliberately adheres to the following principles:

- Prioritize the use of the Woodruff Stack Tower for books and journals materials that are essential for high-use and key subject area
- Recognition of variations in use over different call number ranges
- Sustain a continuous workflow of items to the Library Service Center
- Maintain acceptable density levels in all floors of the stack tower.
- Keeping multi-volume sets intact
- Not sending materials to storage that insufficient metadata, as these materials become less discoverable when they are no longer browseable in the open stacks and difficult to easily request or retrieve from the LSC.
- Digital surrogates for print materials must be without any DRM. In-house use and sufficient, comparable electronic availability will be considered before moving reference items to the LSC.
- Items or selected call number ranges designated by faculty or graduate students to remain in the stacks, even if they would otherwise meet established criteria.
- Older, fragile materials may be better preserved in the environmental conditions maintained at the LSC.

Current Criteria and practices are as follows (approved in Spring 2013)

Monographs with publications dates more than 35 years old (less at the discretion of the subject librarian) and not acquired within the last 10 years, with no circulations or in-house for 10 years. Note that this criteria allows us to maintain (with a slight surplus) current print ingest patterns for the Woodruff Stacks Tower. **Multi-volume sets** should remain in the Stacks if any of their volumes have had any circulation within the last 10 years. Multivolume sets are those that are held together under the same call number range.

Appendix 2:

Open Access Collection Development Policy

Prepared by: Lisa Macklin and Chris Palazzolo

Approved by CM: June 2016

Revision Cycle: 3 Years

Next Update: June 2019

Most Recent Version: 22 February 2018

Purpose

Open Access and Collections

The following policy, drafted by Collection Management and the Office of Scholarly Communication, outlines basic policies and principles regarding the addition of open access content to supplement Woodruff Library's current collection development policy, as well as the support of emerging Open Access monograph and journal programs and models. The policy is divided into two parts: (1) financial support for open access initiatives, and (2) identification and selection of open access content for addition to the collection and OPAC.

Woodruff Library committed to the support and promotion of open access by way of providing open access materials in our collection and supporting open access publishing efforts of faculty members and the greater research and publishing community. These open access materials enhance and supplement traditional resources that are purchased/owned, leased or created by the library.

Support of OA Collection Initiatives

Numerous new and innovative open access initiatives from established and new publishers and presses (e.g. http://oad.simmons.edu/oadwiki/Publishers_of_OA_books) are being marketed and piloted. There a number of models emerging in this area.

The following guidelines should inform selectors and collection managers as to what content initiatives are to be supported by Emory's libraries. Funds for support of these initiatives will likely come be requested from the Common Good fund.

- The content should be within our current collection development guidelines (i.e, would we purchase this content if it were fee-based to support the curricular and research needs of the Emory Community)? *Note that there are cases that even when content may not match Emory curricular needs that Emory may support due to the general nature of the initiative.*
- A sustainable and equitable business model that does not require exorbitant costs on the part of the author or the library
- Library financial support should be based on a cost/content ratio (fees compared in proportion to the content received)

- The company/organization providing the OA content should be reputable and follow the OASPA Code of Conduct (<http://oaspa.org/membership/code-of-conduct/>)?
- The publisher/provides includes a preservation policy in place for the preservation of their open access titles
- For for-profit publishers with open access branches, see note below re: support of individual researchers/scholars.

Support of each model will be reassessed on an annual basis to determine If terms of agreement or support (financial or otherwise) are still beneficial to Emory.

Support for Individual Faculty/Researchers

Although Emory Libraries may not be able to financially foster or support library participation in all notable initiatives, the Library may support individual authors efforts to publish open-access monographs or journal articles. Emory University's Open Access Publishing Fund provides funds to make it easier for Emory authors to publish in eligible open access (OA) journals and books when no alternative funding is available. For eligibility and criteria, please see <https://open.library.emory.edu/authors/oa-fund/>. For example, Emory may provide some subvention funds for authors wishing to publish with for-profit publishers, such as Springer and Cambridge, who have established new open monograph initiatives. *Emory will not provide general funds to these for-profit initiatives.*

Open-Access & Open-Resource Collection Additions

Note that the policies for ingesting below currently refer primarily to Woodruff collection policies, but could easily be adopted by other libraries.

Relevant open access content identified as within our collection development policies will be added to our collections in the same way as purchased content. As emphasized above, the content should be in line with our current [collection development guidelines](#).

Requests for OA Journals are not required as Emory Libraries have activated the Directory of Open Access Journals (DOAJ) as a target in SFX, and these titles are included in DiscoverE. For other content, including open access digital projects and monographs, the following procedures should apply. Please note that all content from supported initiatives will be added to the catalog, and need not be requested. Some of these titles or collections may not have MARC records associated with, but rather other metadata schema (e.g., Dublin Core), and may require a crosswalk into MARC21. A workflow with Technical Services will be established to best manage the incorporation of such records into ALMA.

- Requests should go through CMTAG, as we are committing staff time to catalog and manage
- Rather than requests for individual open access monographs, it is recommended that entire publisher content (or subject collections) be requested through CMTAG
- Weeding of content (i.e., no longer functioning links to content) should take place concurrently with other link checks in the ILS

- Open-access monographs authored by Emory faculty should be considered for local preservation.
- All titles in the Directory of Open Access Books (DOAB) should be catalogued (3,364 titles).

Appendix 3: Research Data Collection Guidelines

Prepared by: Rob O'Reilly, Chris Palazzolo, and Lisa Macklin

Approved by CM: March 2017

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1) Collection Development:

- a. As with other purchases of digital resources, the process for purchasing data resources involves librarians, Collection Management, and Electronic and Continuing Resources (ECR).
- b. Librarians across all areas work with faculty and students to determine data needs and identify data resources for purchase. As part of the process for purchasing data, the appropriate librarian(s) will do an initial review of a requested data resource in terms of its potential uses and will contact the vendor about terms of use and costs, including options for campus-wide access to the resource.
- c. If campus-wide access is not an option, the purchase request will not be sent to CMTAG, and the appropriate librarian(s) will inform the requester that Library purchasing guidelines only support purchasing materials with campus-wide access.
 - i. If, however, the data are requested by the Business School, then the decision whether to pursue purchasing data when campus-wide access is not an option will reside with the Director of the Business Library.
- d. Negotiation of final license terms will be handled by Electronic and Continuing Resources, with input from the appropriate librarian(s) as to the suitability of license terms for scholarly purposes. For data requested by the Business School, license negotiation may be handled by the Director of the Business Library.
 - i. Data that can be made available for campus-wide use can be funded through Library funding sources, and the purchase request will be vetted through CMTAG.
 - ii. The option of campus-wide access for a data resource should always be pursued. When data can only be made available for use by specific individuals or departments, those individuals and/or departments should fund the purchase.
 - iii. If campus-wide access is an option but the review of license terms by ECR concludes that the terms of use are not consistent with Library and university policies, then the Library will not be able to purchase the data

and the appropriate librarian(s) will notify the requester. The appropriate terms of use are defined in the Emory University Libraries Licensing Checklist (August 2015) and the Data Addendum (March 2016). Likewise, if the costs of campus-wide access are prohibitive, the appropriate librarian(s) will notify the requester that the Library will not be able to purchase the data.

- a. If, however, the data are requested by the Business School and the Business Library is handling the license negotiations, final determination of whether license terms are acceptable will reside with the Director of the Business Library.
- iv. Licensing questions can be vetted by the Scholarly Communications Office if needed.
- v. If the Libraries are splitting the cost of a purchase with a department, the vetting and negotiation of any license will be handed by the ECR team, or by the Business Library when the request is from the Business School.
- vi. If the Libraries are splitting the cost of a purchase with a department, the data themselves must reside within the Library or on a Library server if they are not otherwise accessible through an on-line interface.

2) Location and Manipulation:

- a. Faculty and students requiring assistance with locating data and getting them into a usable form should contact Emory's Center for Digital Scholarship (Rob O'Reilly).

3) Data Management:

- a. Faculty and graduate students who have a need to manage and store their own research data should contact the Scholarly Communications Office for more information (Jen Doty - <http://web.library.emory.edu/research-learning/scholcomm-datamgmt/research-data-management.html>).

Appendix 4: Gift Books Policy

Prepared by: Chuck Spornick and Chris Palazzolo

Approved by CM: March 2018

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Gifts-In-Kind Policy

The Emory University Woodruff Library welcomes gifts of books, manuscripts, music, and other research materials. It is, in part, through such generosity that the Libraries are able to add depth to the academic resources available to our community. Particular interest is paid to scholarly, current, or rare items in good physical condition. The following guidelines are offered to assist donors and/or subject librarians working directly with donors. Based upon these criteria, the University Libraries retain the right to accept or decline all potential gifts.

I. General Guidelines

Due to the high costs of managing the gift process, the Libraries' goals in accepting gifts are to acquire only materials which are highly relevant to the university's needs. All potential gifts will be evaluated by subject expert librarians in accordance with the collection development policies of the Emory University Libraries. Potential gift items will meet one or more of the following criteria:

- Support the University's current and evolving curriculum and academic disciplines;
- Sustain the research needs of faculty and students;
- Augment collections of depth;
- Enhance the unique and noteworthy holdings of
- Emory University Libraries special collections.

Types of Donations that are Generally Considered Inappropriate

- Materials that are not in good physical condition, e.g., contain mold or mildew, tears, stains, water damage or are in any way impaired in a manner that results in limited or restricted use. These are potentially harmful to existing collections.
- Large museum type artifacts. Such items cannot be accommodated by the Libraries.
- Materials that require significant restoration or conservation or unique storage, unless accompanied by appropriate funding.
- Gifts on which a donor places restrictions that will negatively affect access to and use of the materials.
- Textbooks.
- Popular trade paperbacks.
- Single issues of periodicals or broken runs of bound periodicals, unless they fill gaps in our current collection.
- Outdated, superseded titles.
- Outdated media formats such as LPs, cassettes, etc.
- Materials which duplicate current holdings.
- Photo copies/facsimiles of original materials.

II. Process for Accepting Gifts

1. Donors will provide a title list and description of any gift before it can be considered. In the absence of such documentation, the Libraries may require on-site evaluation of the

collection by subject area specialist or other library staff before a determination to accept can be made. These expert individuals will evaluate potential gifts for appropriateness to the collections.

2. Gifts delivered without prior arrangement or contact with the Libraries' acquisitions and gifts staff or staff listed above may not be accepted or acknowledged.
3. Potential donors of materials should contact the Head of Collection Management, Dr. Chris Palazzolo (cpalazz@emory.edu).

III. Disposition of Gift Materials

1. Per library policy, no duplicate materials will be added to the collection.
2. With the exception of some archival materials, all gifts added to the collection will be cataloged and listed in the Libraries' online public catalog. Archival materials are principally accessible through electronic finding aids as published by the University Libraries.
3. Preference is for a local note to be added to the catalog record to acknowledge the provenance of the gift, rather than a book plate.
4. Due to lack of space in Emory' stacks, most gift materials that are added to the general collections are sent to our offsite Library Service Center. These items are retrievable and can be requested by way of the library catalog.
5. Gifts that are not added to the collection may be disposed of in one of the following ways:
 - If of artifactual value, they may be sold to a specialty book dealer, a general used book dealer, or donated to charitable organizations focusing on book donations, and the proceeds used to support future acquisitions for the University Libraries' research collections.
 - All other unaccessioned gifts may be sold through the University Libraries periodic book sales, given to other libraries, various charities, or recycled. Proceeds from book sales may be used to support future library activities or acquisitions for the University Libraries' research collections.
 - Only in special circumstances, and if arranged in advance, may items be returned to donor.

Appendix 5:

E-Books and E-Journals Principles and Considerations

Prepared by: Chris Palazzolo

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In deciding upon the purchase of individual e-books or e-book packages, certain considerations should be noted and questions asked:

- **What digital rights management software, if any is being used?:** are there limitations on downloading, copying, pasting, and general access?
- **What is the downloadable formats for titles?:** PDF is the most widely accepted, but some providers are providing epub and other formats.
- **How can titles be accessed?:** Are titles downloadable and readable via a commercial e-reader?
- **Is content restricted to a proprietary platform?**
- **Almost all vendors allow for chapter downloads, but not all allow downloads for entire books.**
- **Duplication with print materials or other e-titles**
- **There will definitely be implications with DDA; omitting/excluding titles from packages.** Can we work with YBP on this issue?
- **Use statistics:** Ability to retrieve robust, accepted measures of content use.
- **Reserves:** Ability to utilize e-book content in Reserves
- **Interlibrary Loan:** Is content able to be shared with other libraries? If so, how much content?

With these considerations in mind, Woodruff Library prefers the following:

- ✓ Portability between devices, with publishers and aggregator platforms using non-proprietary formats for their ebooks.
- ✓ Consistency of content across the print and electronic format and the incorporation of corresponding supplementary material
- ✓ Working jointly with publishers and aggregator platform vendors to develop standards for printing, copy/paste, and saving of ebook content.
- ✓ Quality Full-level MARC bibliographic records
- ✓ The Interlibrary Loan process or comparable way to lend and borrow ebooks between libraries.
- ✓ Perpetual access to purchased and/or subscribed content.

- ✓ ADA compliance.
- ✓ [COUNTER](#) compliant usage statistics.
- ✓ Licensing terms which do not limit fair use and first sale doctrines under US copyright law.
- ✓ Simultaneous format availability of frontlist titles.
- ✓ Alerts that new books have been added to existing collections.
- ✓ Pricing models that are reasonable, flexible and reflect the broad needs of the library market.
- ✓ The ability to migrate purchased and/or subscribed content between platforms in the event of the end of life of a platform.
- ✓ The ability to coordinate discovery with third party services such as SFX.

In deciding what e-journal titles to move to e-only access, the following criteria are applied:

1. Content: the content available online meets or exceeds that available in print
2. Archival Rights: the license terms grant perpetual access to the volumes/years subscribed
3. Use of online content: the license terms grant the right for Authorized Users to print and download articles in reasonable quantity from the online version. In addition, the design of the publisher's website allows for printing from a PDF file.
4. Electronic Reserves: the license terms grant the right to link to content or to post content from Emory's eReserves service

Loss of content with the electronic over the print that negatively impacted teaching or research, substantial in house use of a print title (or circulation), and/or an Emory affiliation with the editorial board may be considered for maintaining a title in print.

The above criteria assumes that a license is available for review, and that IP authentication from the vendor is possible.

