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## Large Scale Acquisitions

Program Evaluation

November 2016

**PREPARED BY:**

Name: Kim Armstrong  
Title: Director, Library Initiatives  
Institution: Big Ten Academic Alliance

**REVIEW COMMITTEE:**

Name: Damon Jaggars  
Title: Vice Provost and Director of University Libraries  
Institution: The Ohio State University

Name: Sarah Pritchard  
Title: Dean of Libraries  
Institution: Northwestern University

Name: Daniel Mack  
Title: Associate Dean, Collection Strategies and Services  
Institution: University of Maryland

Name: Charles Spetland  
Title: Collection Development Officer  
Institution: University of Minnesota

Name: Tom Teper  
Title: Associate University Librarian for Collections  
Institution: University of Illinois at Urbana-Champaign

Name: Rob Van Rennes  
Title: Assistant Director, Library Initiatives  
Institution: Big Ten Academic Alliance

# Big Ten Academic Alliance Large Scale Acquisitions Program Evaluation

## November 2016

### Summary and Future Considerations

The Large Scale Acquisitions program is in its third and final year. A decision on its future will be discussed during the November 2016 meeting of the library directors and it is hoped that following topic can be addressed:

- Should the program continue?
- If the program is to continue, at what level should it be funded?
- If the program is to continue, are the goals and objectives still relevant?
- If the program is to continue, what types of resources should be pursued
- If the program is to continue, what types of changes or adjustments should be made, if any?

Limitations of the program:

- Resources purchased through the program have been for the most part confined to one time purchases which eliminate opportunities for subscription based products including those which feature hosting fees
- Funding limits in some cases prevent the participation in certain offers and lead to lost opportunities
- Content needs by individual institutions may vary dramatically from deal to deal and may lead some to believe they aren't receiving the full benefit of the program. However, it also indicates that for those schools who receive less content through the program, that the purchases were of value, but the individual institution invested in the resource before the Big Ten could acquire it at a discounted price
- Although every effort is made to purchase content that appeals to every institution, there are occasions when a particular resource has a lower priority for some members. It's hoped that these instances are rare and that the savings from the totality of the purchases overcome these concerns

Strengths of the program:

- The purchasing power of the membership is substantial and results in discounting that individual institutions cannot attain
- Pooled funds that can be applied centrally allow the consortium to take advantage of time sensitive offers and obtain some of the highest discounting
- Group licensing through the consortium saves staff time across all member institutions
- Group purchasing establishes content parity and supports other strategic initiatives such as the Shared Print Repository.

## Recommendations:

- Rather than revisiting the viability of program every few years considering its overall success, the committee would like to propose that it continue indefinitely with the funding allocations being reviewed on a three-year cycle.
- Allocations remain at the \$200,000 level with an optional \$50,000 contribution to be held in reserve and used at the discretion of the individual libraries.

## Background

In 2008 the Big Ten library directors approved the creation of the Large Scale Acquisition Program. A central pool of funds was established with each member contributing \$100,000 dollars. The primary goals of the program were to save money by marshalling the collective buying power of the group in price negotiations, save time and work for each institution who were ultimately buying the same resources, and create more parity and predictability across the libraries. Following a review of the program in 2011, the library directors agreed to double their commitment to \$200,000 per year with an additional sum of \$50,000 set aside and subject to campus review before the funds could be applied (opt-in funds). The program has operated in this fashion through 2016 with the University of Chicago moving in and out as its budget priorities permit.

## Current Program Goals and Objectives

- Extend the breadth and depth of resources available to all students, faculty, and staff at the member universities. *79% of Collection Development Officers (CDOs) ranked as very successful or successful.*
- Foster higher levels of collection coordination across member libraries to realize greater predictability for users about the availability of certain core holdings, and at the same time enabling each of our libraries to allocate greater staff time and funding to the development of more specialized and unique resources. *64% of CDOs ranked as very successful or successful.*
- Use the collection funds of universities to advance the individual and collective strategic and operational objectives of our libraries and campuses. *64% of CDOs ranked as very successful or successful.*
- Make the acquisition and licensing of electronic resources as efficient and timely as possible, but without compromising the opportunity for member libraries to adequately review and consider proposals. *64% of CDOs ranked as very successful or successful.*
- Influence the underlying terms being offered by commercial publishers and transform the direction of scholarly communication. *36% of CDOs ranked as very successful or successful.*
- Secure archival rights and protections for licensed content as appropriate. *79% of CDOs ranked as very successful or successful.*
- Provide transparency and accountability for agreements so members clearly understand the principles by which costs and benefits are allocated among member institutions. *86% of CDOs ranked as very successful or successful.*

## **Current Program Environment**

Big Ten staff from the Library Initiatives team and a small advisory committee drawn from the Big Ten Collection Development Officers seek to acquire content for participating members that: involves significant content; saves money; benefits seven or more libraries; advances promising new models of scholarly communications; leverages the value of existing content by advancing integration and interoperability; and contains ancillary benefits that support other projects or goals of the Big Ten.

## **Communication**

A common concern voiced by the stakeholders involves the transparency of the negotiations and a desire to know specific costs for individual institutions. It's understandable that this type of information is wanted, yet it must be balanced with a certain level of confidentiality. Publishers are offering the consortium the lowest possible pricing and if these amounts become known, our partners may be confronted by existing customers who have already purchased the resources at a higher rate or who will demand the same level of discounting as the membership. For these reasons final costs and savings are generally provided to the membership in aggregate form that provide a sense of the benefits without disclosing the specifics of the deals.

## **Member Participation**

The following universities are active member participants of the Big Ten Large Scale Acquisitions program:

University of Illinois at Urbana-Champaign

Indiana University

University of Iowa

University of Maryland

University of Michigan

Michigan State University

University of Minnesota

University of Nebraska-Lincoln

Northwestern University

The Ohio State University

Pennsylvania State University

Purdue University

Rutgers University

University of Wisconsin-Madison

## **Outcomes/success**

From its inception, the Large Scale Acquisitions program was intended to be opportunistic, taking advantage of one or another publisher's need for a quick infusion of cash. Discounting targets are generally 65% off list prices, 50% off existing individual school proposals, and 30% off actual Big Ten school purchases. These targets expand and contract depending on the desirability of the products

involved, their age in the market, compensating benefits being extended for other products (i.e., journal packages), etc., and actual discounting results have ranged from 35% off list to 89% off list. Table 1 shows the reported individual and collective savings realized by Big Ten schools participating in the program.

**Table 1. Reported Large-Scale Savings Off Actual Market Prices Per Big Ten Library and Total, 2009-2017**

Year	Total Cumulated Investment*	Total Spend	Average Savings Per School off Individual Big Ten Pricing	Total Big Ten Savings off Individual Big Ten Pricing
2009	\$ 1,100,000	\$1,005,700	\$ 79,725	\$ 1,036,425
2010	\$ 1,000,000	\$1,090,876	\$ 201,207	\$ 2,615,691
2011	\$ 2,400,000	\$2,635,848	\$ 485,169	\$ 5,231,941
2012	\$ 2,600,000	\$2,117,026	\$ 101,868	\$ 1,069,396
2013	\$ 2,400,000	\$1,800,380	\$ 236,530	\$ 3,303,412
2014	\$ 2,800,000	\$2,093,773	\$ 308,217	\$ 3,640,598
2015	\$ 2,800,000	\$2,541,978	\$ 224,247	\$ 3,032,646
2016	\$ 3,350,000	\$2,878,634	\$ 390,970	\$ 5,372,564
2017	TBD	TBD	TBD	
<b>Totals</b>	<b>\$ 18,450,000</b>			<b>\$ 25,302,673</b>
	*Includes Opt-in funds when applicable; Unused money rolled over to the next year or refunded		Participant level may vary by specific deals and years depending upon the needs and wants of each institution	

### Member Survey Results

Two surveys were conducted during the fall of 2016 to elicit member feedback on the Large Scale Acquisitions program. One survey was provided to the Big Ten library directors and the other was completed by the collection development officers representing each institution. Ten of the Big Ten directors responded to survey while fourteen of the collection development officers participated. Although the surveys were very similar, there were a few questions that were specific to each group. The complete results of the surveys may be found in the Appendix.

## **Library Directors Survey**

The library directors were asked to rate the value of the program in terms of building and/or managing their collections as well as the importance of the program relative to other Big Ten endeavors. 91% responded that the program was very valuable or valuable to their library. 73% considered the program more important or of equal importance relative to other Big Ten activities.

In the next five years, 82% of the directors believed that the Large Scale Acquisitions program would be very important or important to continue for their library. In regards to cost savings 82% also thought that the program was valuable or very valuable.

## **Collection Development Officers Survey**

The collection development officers were asked to rate the value of the program in terms of building and/or managing their collections as well as the value of the program in regards to cost savings. 93% responded that the program was very valuable or valuable to their library in managing and building their collection. 86% considered the program very valuable or valuable in regards to cost savings.

In the next five years, 71% of the collection development officers believed that the Large Scale Acquisitions program would be very important or important to continue for their library. 79% considered the program more important or of equal importance relative to other Big Ten activities.

## **Appendices**

- A. Complete Library Directors' Survey Results
- B. Complete Collection Development Officers' Survey Results
- C. Large Scale Acquisitions History

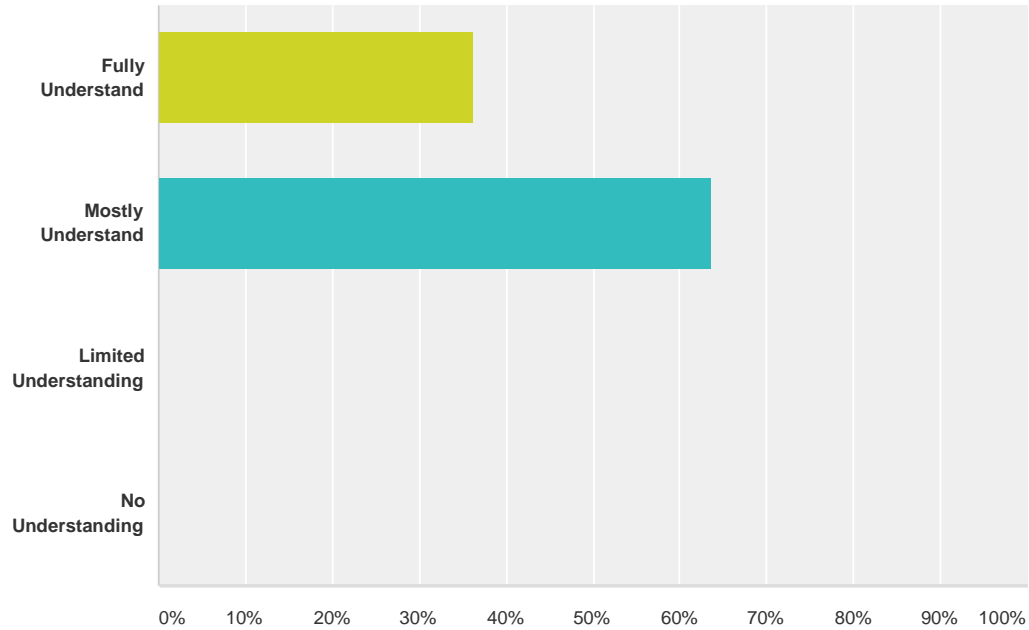
### Q1 Name (optional)

Answered: 8 Skipped: 3

#	Responses	Date
1	Kris Maloney	10/31/2016 8:31 AM
2	Wendy Lougee	10/13/2016 3:11 PM
3	Jim Mullins	10/13/2016 2:56 PM
4	John Culshaw	10/13/2016 1:59 PM
5	Damon Jaggars	10/13/2016 9:25 AM
6	Ed Van Gemert	10/4/2016 1:27 PM
7	Cliff Haka	10/3/2016 7:05 PM
8	John Wilkin	10/3/2016 4:22 PM

## Q2 How well do you feel you understand the goals and activities of the Large Scale Acquisitions Program?

Answered: 11 Skipped: 0

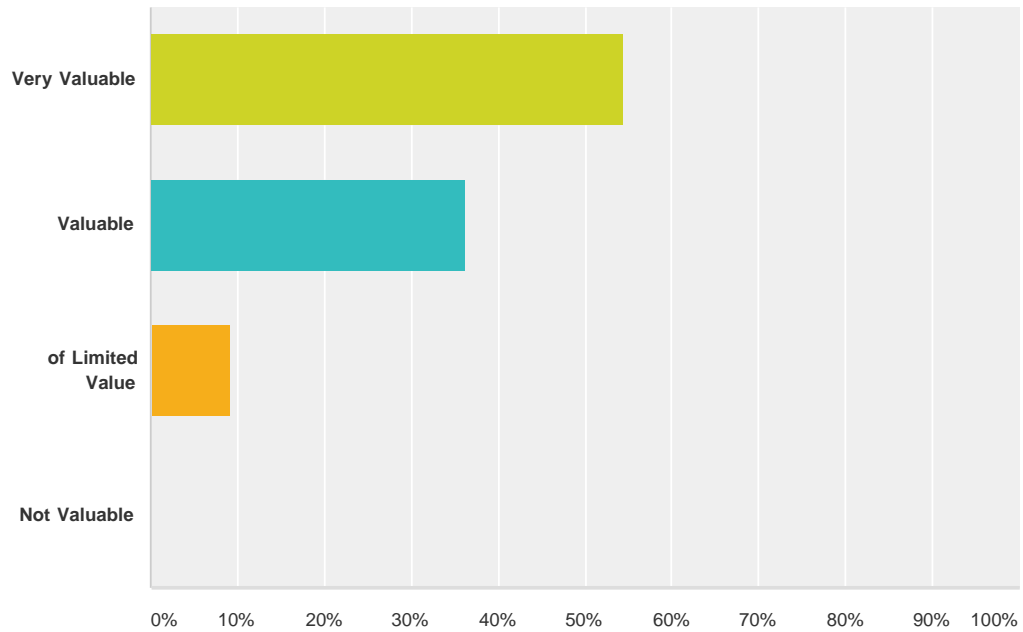


Answer Choices	Responses	Count
Fully Understand	36.36%	4
Mostly Understand	63.64%	7
Limited Understanding	0.00%	0
No Understanding	0.00%	0
<b>Total</b>		<b>11</b>



### Q3 In terms of building/managing your collection, how valuable is the Large Scale Acquisitions program to your library?

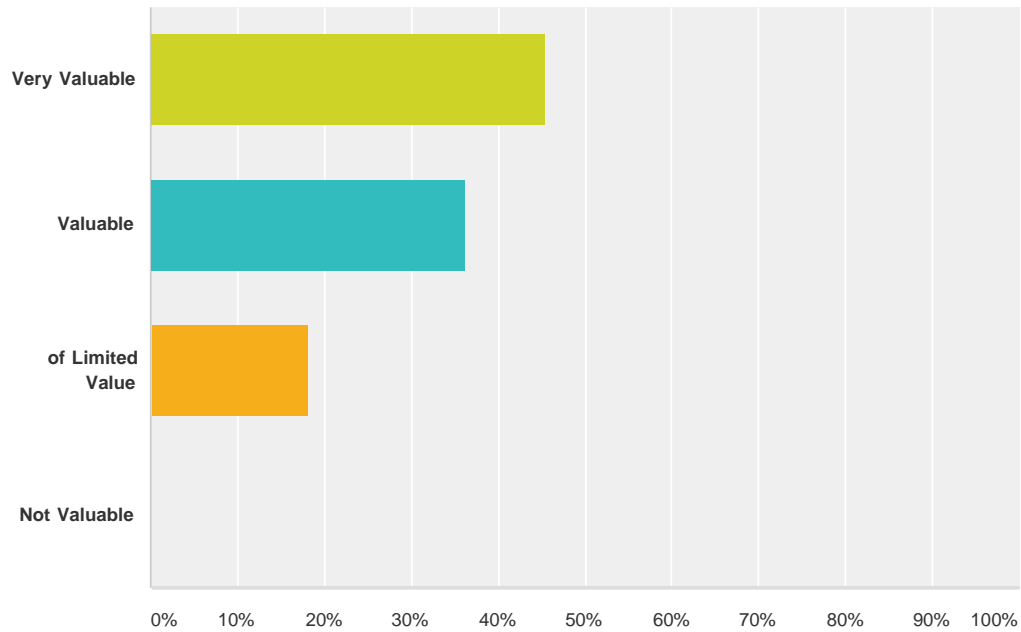
Answered: 11 Skipped: 0



Answer Choices	Responses
Very Valuable	54.55% 6
Valuable	36.36% 4
of Limited Value	9.09% 1
Not Valuable	0.00% 0
<b>Total</b>	<b>11</b>

### Q4 In regards to cost savings, how valuable is the Large Scale Acquisitions program to your library?

Answered: 11 Skipped: 0



Answer Choices	Responses
Very Valuable	45.45% 5
Valuable	36.36% 4
of Limited Value	18.18% 2
Not Valuable	0.00% 0
<b>Total</b>	<b>11</b>

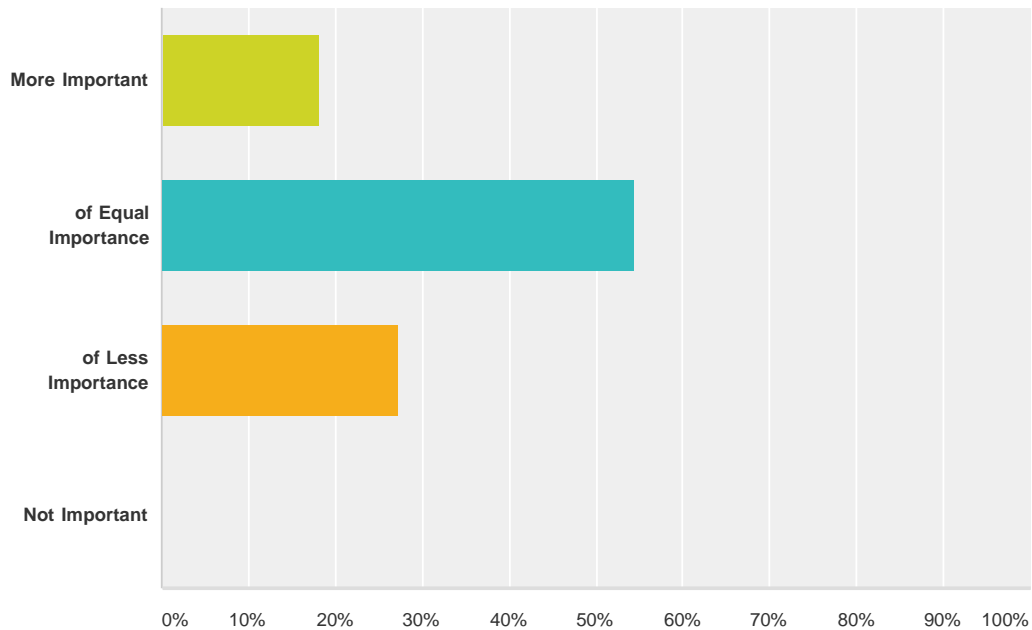
## Q5 Are there other reasons why the Large Scale Acquisitions Program is valuable to your institution?

Answered: 7 Skipped: 4

#	Responses	Date
1	The items that were purchased would not have been our top priorities.	10/31/2016 8:31 AM
2	Continued credibility of the shared resources projects as a philosophy that matters to provosts as well as to libraries	10/25/2016 3:09 PM
3	Focused negotiation, presumably better deals.	10/13/2016 3:11 PM
4	It demonstrates the benefits in participating in projects sponsored by BTAA.	10/13/2016 2:56 PM
5	Besides simply stretching dollars as far as possible with our Big Ten colleagues, large scale acquisitions has allowed us to take best advantage of the shared print repository.	10/13/2016 1:59 PM
6	The University sees financial benefits from greater collaboration with the BTAA and often cites the Large Scale Acquisitions Program as an example of collaboration at scale.	10/4/2016 1:27 PM
7	The Big Ten can present a unified front in terms of the negotiations. And in general I like the Big Ten acting consortially with vendors is just a good thing.	10/3/2016 7:05 PM

**Q6 Relative to other Big Ten Academic Alliance library activities (shared print repository, consortial licensing, Google digitization), how would you rate the importance of the Large Scale Acquisitions program?**

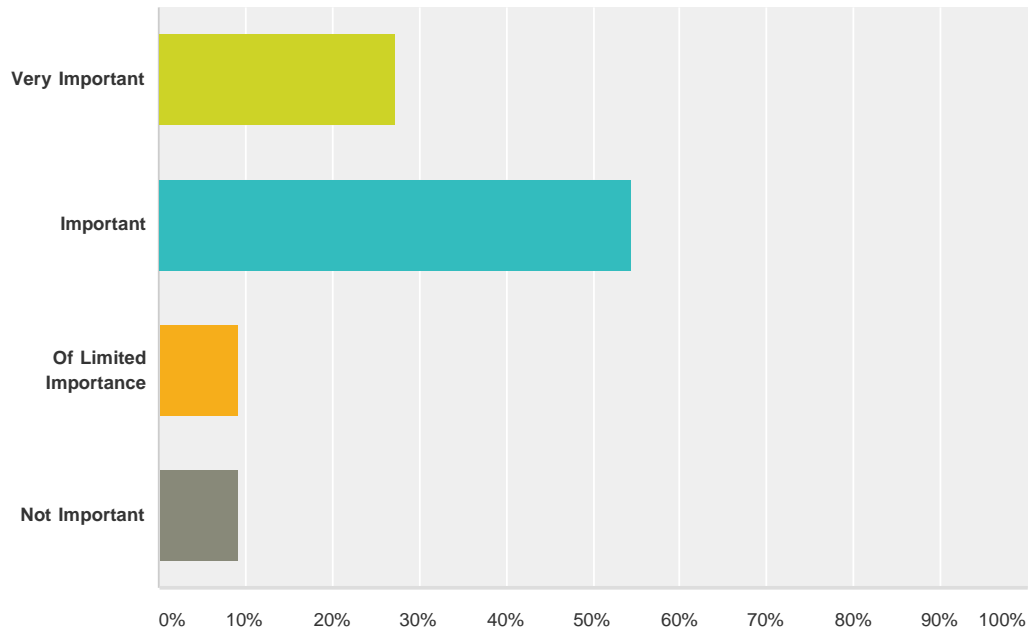
Answered: 11 Skipped: 0



Answer Choices	Responses	
More Important	18.18%	2
of Equal Importance	54.55%	6
of Less Importance	27.27%	3
Not Important	0.00%	0
<b>Total</b>		<b>11</b>

### Q7 In the next 5 years, how important would it be to continue the Large Scale Acquisitions program to your library?

Answered: 11 Skipped: 0



Answer Choices	Responses
Very Important	27.27% 3
Important	54.55% 6
Of Limited Importance	9.09% 1
Not Important	9.09% 1
<b>Total</b>	<b>11</b>

#	Please elaborate	Date
1	We assume certain resources that we would want anyway, will be more economical to purchase through BTAA.	10/25/2016 3:09 PM
2	This depends upon the availability of logical large scale collections to be purchased, and how relevant they are to overall collection offerings. A big disadvantage has been that if our library has already acquired the product, there has not always been a way to recognize that and provide an alternative, or a savings.	10/13/2016 2:56 PM
3	Being relatively new, I have to rely on my staff's take on the program. What I'm told is that the program has not been market shaping or strategic for us but brought in some "eh" content that we might have been able to cut a similar deal for on our own, if we wanted it. There is also a feeling that a lot of the deals have been in the \$5-10,000 range and that the work required to negotiate these deal on the part of BTAA staff might not justify the \$1-2,000 that resulted.	10/13/2016 9:25 AM
4	The savings realized from this program are just too valuable to let go.	10/11/2016 1:20 PM
5	We should strive for more collaborative efforts rather than less. Vendors more likely to make great offers knowing that a large number of sales are involved.	10/3/2016 7:05 PM

6	I genuinely appreciate the opportunity we have to consolidate funds to take advantage of purchasing power. I'm at best uneasy about shifting continuing commitments to these funds. The instrument doesn't allow me to say I'm very supportive of one-time opportunities and (probably) opposed to continuing commitments. Thus, I'm inclined to occasionally say "Important" and other times say "of Less Importance."	10/3/2016 4:22 PM
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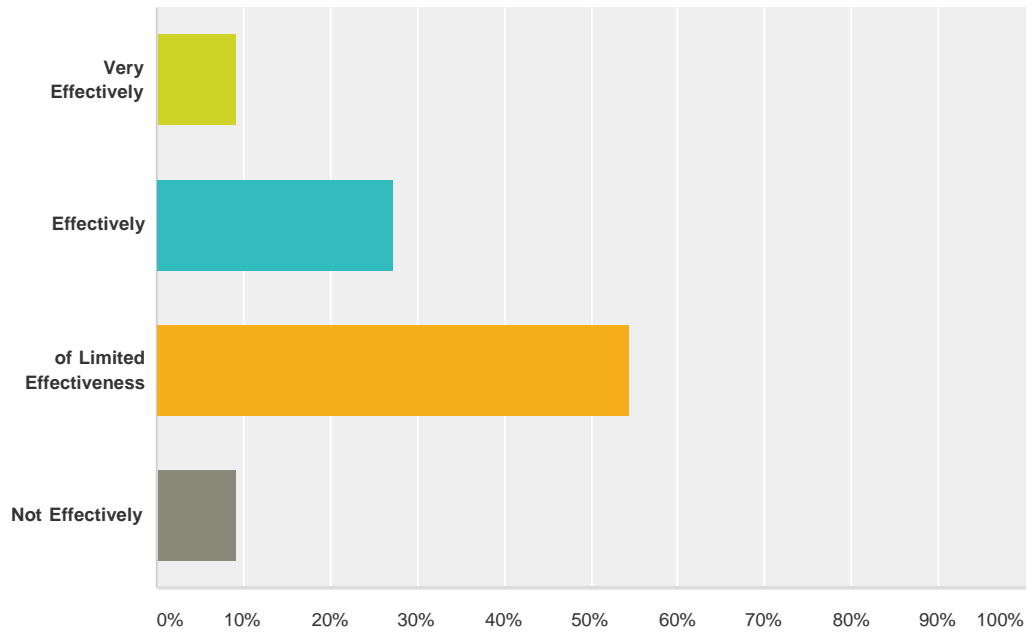
## Q8 If the LSA program were to continue, what goals or strategies should we pursue in the future?

Answered: 9 Skipped: 2

#	Responses	Date
1	backfiles and ebooks	10/31/2016 8:31 AM
2	Consider core ongoing subscriptions rather than just one-time single purchase model; and very important to target things that will allow us to discard print duplicates.	10/25/2016 3:09 PM
3	Needs clarity of focus, review of criteria, and attention to recurring vs. one-time issues.	10/13/2016 3:11 PM
4	To insure that all members see a benefit of the packages that are being selected, and that if one or two institutions are not interested, or already own the package, they are excused or receive a credit or reimbursement from BTAA.	10/13/2016 2:56 PM
5	Go big or don't bother. We need to justify the work of negotiating with real savings by the members.	10/13/2016 9:25 AM
6	Extending the program to more publishers and aggregators.	10/11/2016 1:20 PM
7	I think we should continue to try to put more not fewer resources into the program. E-book content, e-journal back-runs, streaming video. Possibly multi-year agreements with the big publishers. I'm open to discussions of any content that saves us money.	10/4/2016 1:27 PM
8	Larger scale.	10/3/2016 7:05 PM
9	Focus exclusively on key one-time opportunities or continuing opportunities that we can commit to for the very long term.	10/3/2016 4:22 PM

### Q9 How effectively have the activities of the Large Scale Acquisitions Advisory Board been communicated to the stakeholders?

Answered: 11 Skipped: 0



Answer Choices	Responses
Very Effectively	9.09% 1
Effectively	27.27% 3
of Limited Effectiveness	54.55% 6
Not Effectively	9.09% 1
<b>Total</b>	<b>11</b>



### Q10 Should some Large Scale Acquisitions funds be used for recurring collection investments? If so, can you elaborate?

Answered: 11 Skipped: 0

#	Responses	Date
1	No. It seems like it would be complicated to manage and ensure fairness.	10/31/2016 8:31 AM
2	Yes, definitely, that is how we will really economize in our collections budgets (better than constantly just adding on extra one-time purchases)	10/25/2016 3:09 PM
3	Not sure.	10/25/2016 2:00 PM
4	An overall framework with criteria would help assess the recurring question. We know there is interest, for example, in an Elsevier license. How would that fit within the current financial commitments.	10/13/2016 3:11 PM
5	If this is committing funds that will require multiple years to fulfill, then yes I agree this should be considered.	10/13/2016 2:56 PM
6	Yes.	10/13/2016 1:59 PM
7	No.	10/13/2016 9:25 AM
8	No.	10/11/2016 1:20 PM
9	Without annual budget increments, we build a structural deficit from the start with shared collections that require recurring commitments. You either cut or you add dollars. Hard to find agreement there.	10/4/2016 1:27 PM
10	If we can get a great "long term" deal on something, why not?	10/3/2016 7:05 PM
11	Only if we are certain that we will remain committed to those investments.	10/3/2016 4:22 PM

**Q11 Should some of the funds be considered for other initiatives other than collections? (i.e., digitization projects, publishing, new purchasing models, open access)**

Answered: 11 Skipped: 0

#	Responses	Date
1	Uncertain. It depends on the initiative.	10/31/2016 8:31 AM
2	Yes but do that as a separate financial pool/commitment.	10/25/2016 3:09 PM
3	Yes.	10/25/2016 2:00 PM
4	While this may seem attractive, it appears to be mission creep for designated funds. New initiatives in these types of areas would seem to need a separately crafted proposal and financial model, as well as lead team to develop.	10/13/2016 3:11 PM
5	Only if it is approved by all member directors, prior to a purchase or the commitment being made.	10/13/2016 2:56 PM
6	Yes. It would be important to consider how these initiatives would be designed and managed. For example, for digitization projects, would we do this collectively 'in-house' or outsource to a vendor. Would the vendor just digitize or also deliver the content? And what would that mean for open access to these collections. Open access models and collaborations with presses might be another area.	10/13/2016 1:59 PM
7	Potentially. If we aren't seeing value across member institutions or if the universe of potential products to purchase is bounded, maybe we should look at other investments that would be of more benefit.	10/13/2016 9:25 AM
8	No. We need this program to continue strongly and in a well-funded manner.	10/11/2016 1:20 PM
9	I'm open to a discussion of using a percentage of the collection funding to support Open Access. What, how much, etc. to be determined.	10/4/2016 1:27 PM
10	Theoretically yes, but coordinating some of these others things will probably be much more difficult. If we want to do additional projects like these suggestions I'd rather put fresh money into pots for those initiatives rather than assume we need to reduce the commitment to LSA.	10/3/2016 7:05 PM
11	I like this idea but would like more discussion.	10/3/2016 4:22 PM

## Q12 What additional comments or concerns would you like to share about the program?

Answered: 4 Skipped: 7

#	Responses	Date
1	Obviously, I am new so I don't fully understand how collection decisions were made or communicated. The collections that were purchased were nice additions to our collections, but would not have been a priority for us.	10/31/2016 8:31 AM
2	My sense is that the early years had the greatest impact due to the need we all had to purchase large digital packages, however, as the low hanging fruit has been harvested I believe we may be facing more issues about how much benefit all or a majority of members will have from the large scale joint purchases. Although I would hate to think that this could come about, there is a possibility that there could be a time when a decision will need to be made whether a university library can commit funds to purchasing new resources as opposed to paying the bills for the databases and continuations already deemed necessary or for a particular year fund the purchase of one time acquisitions.	10/13/2016 2:56 PM
3	This is a great program that needs to be continued and expanded.	10/4/2016 1:27 PM
4	See # 7.	10/3/2016 4:22 PM

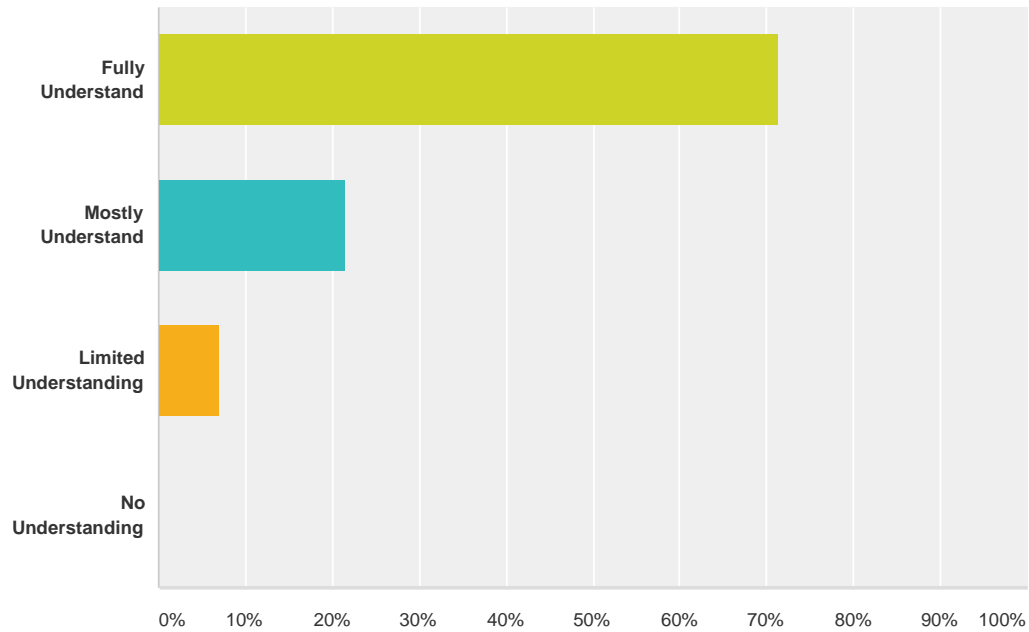
**Q1 Name (optional)**

Answered: 8 Skipped: 6

#	Responses	Date
1	Marion Frank-Wilson	10/14/2016 12:49 PM
2	Rebecca Richardson	10/13/2016 3:04 PM
3	D.J. Hoek / John Blosser	10/11/2016 1:19 PM
4	Daniel Mack	10/11/2016 7:03 AM
5	Thomas Teper	10/7/2016 12:46 PM
6	Steven Sowards (MSU)	10/4/2016 8:13 AM
7	Doug Way	10/3/2016 9:57 PM
8	Bryan Skib	10/3/2016 3:59 PM

## Q2 How well do you feel you understand the goals and activities of the Large Scale Acquisitions Program?

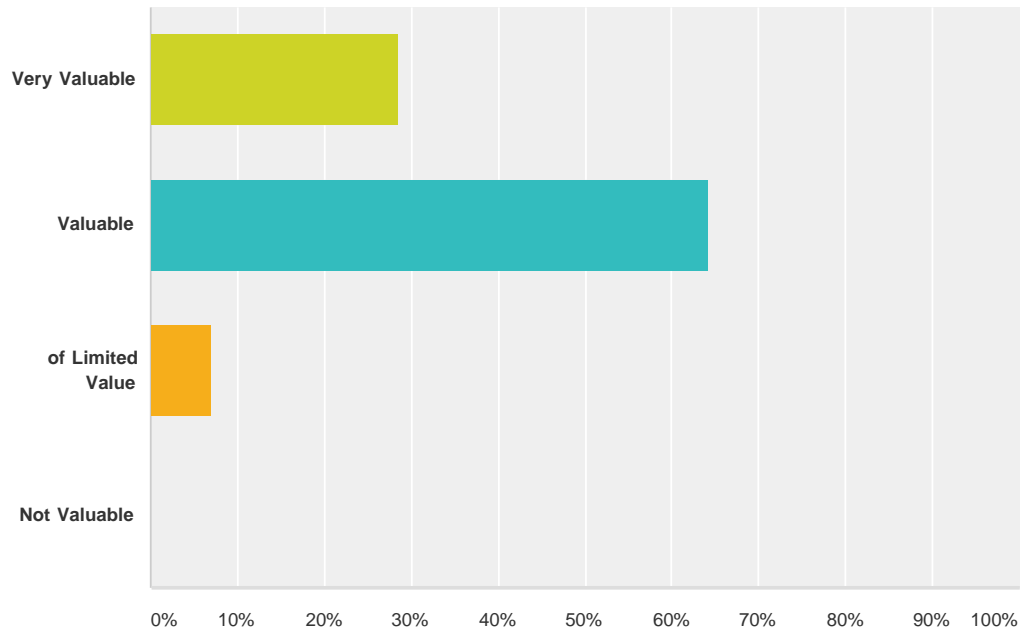
Answered: 14 Skipped: 0



Answer Choices	Responses	
Fully Understand	71.43%	10
Mostly Understand	21.43%	3
Limited Understanding	7.14%	1
No Understanding	0.00%	0
<b>Total</b>		<b>14</b>

### Q3 In terms of building/managing your collection, how valuable is the Large Scale Acquisitions program to your library?

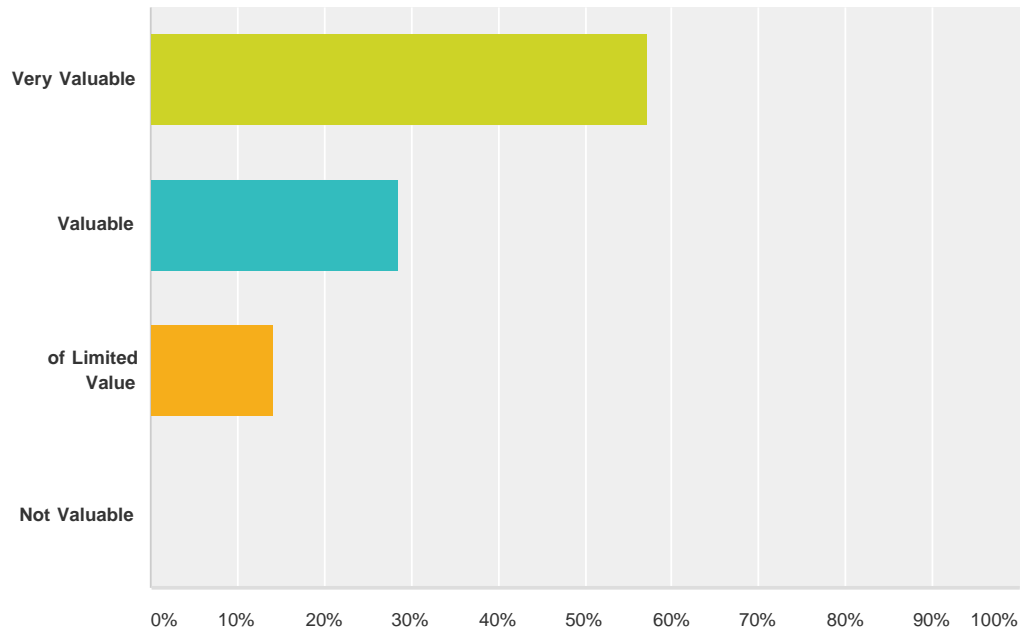
Answered: 14 Skipped: 0



Answer Choices	Responses
Very Valuable	28.57% 4
Valuable	64.29% 9
of Limited Value	7.14% 1
Not Valuable	0.00% 0
<b>Total</b>	<b>14</b>

### Q4 In regards to cost savings, how valuable is the Large Scale Acquisitions program to your library?

Answered: 14 Skipped: 0



Answer Choices	Responses
Very Valuable	57.14% 8
Valuable	28.57% 4
of Limited Value	14.29% 2
Not Valuable	0.00% 0
<b>Total</b>	<b>14</b>

## Q5 Are there other reasons why the Large Scale Acquisitions Program is valuable to your institution?

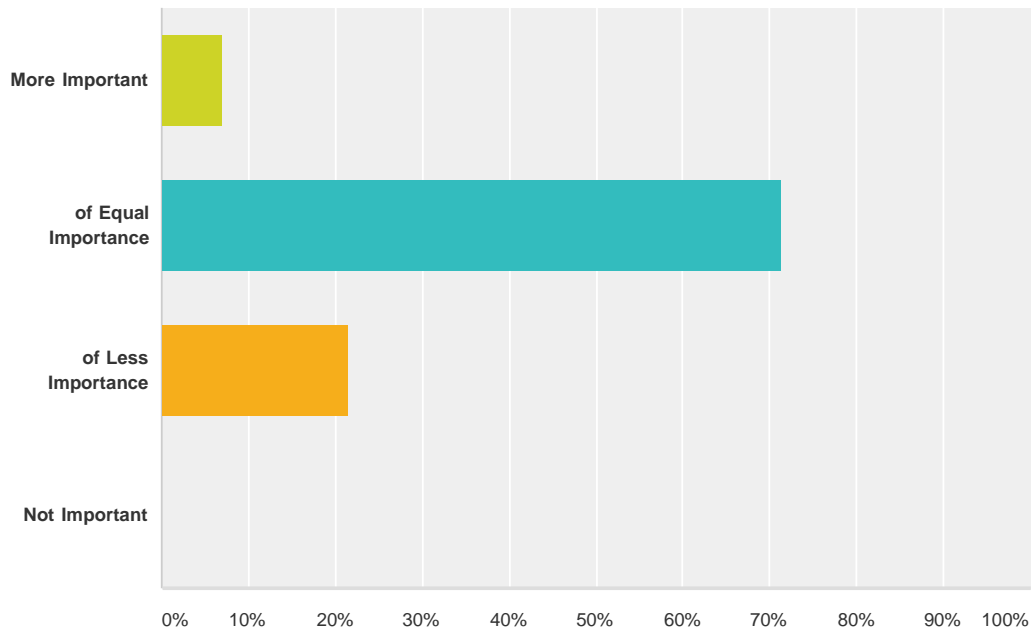
Answered: 14 Skipped: 0

#	Responses	Date
1	The LSA program may be of particular value to the humanities programs in our institution.	10/14/2016 3:13 PM
2	During my short time in the position, I have already had the opportunity to appreciate the negotiating power of a consortium as large as the BTAA. I have also benefitted tremendously from the shared wisdom of the group when it comes to licensing decisions and negotiations with publishers.	10/14/2016 12:49 PM
3	It assists with rightsizing efforts. Enhanced purchase power.	10/13/2016 3:04 PM
4	Central negotiation of licenses saves us staff time.	10/11/2016 1:19 PM
5	Supporting our efforts for shared print which allows us to downsize our physical footprint.	10/11/2016 1:05 PM
6	saves lots of time and effort in vendor interaction and negotiations.	10/11/2016 11:08 AM
7	The resources acquired through the LSA program permit us to gain access to resources we would never be able to afford otherwise. These resources support research and teaching across all disciplinary areas. In addition, the acquisition of digital back files of journals has let us repurpose significant amounts of stack space to create technology rich, student focused collaborative work areas.	10/11/2016 7:03 AM
8	No response	10/10/2016 1:22 PM
9	(an answer)	10/7/2016 12:46 PM
10	Deep discounting of some resources of high interest to our users.	10/6/2016 11:20 AM
11	Exploration of resources we might otherwise skip over; opportunity to strengthen the consortium; demonstration of library priorities to publishers.	10/4/2016 8:13 AM
12	Point of engagement and participation in BTAA programs.	10/4/2016 7:41 AM
13	N/A	10/3/2016 9:57 PM
14	LSA makes it easier for us to imagine and to act upon the collective BTAA collection. LSA, fully exercised, can also lead publishers towards better license terms & conditions -- helping the community more broadly.	10/3/2016 3:59 PM



**Q6 Relative to other Big Ten Academic Alliance library activities (shared print repository, consortial licensing, Google digitization), how would you rate the importance of the Large Scale Acquisitions program?**

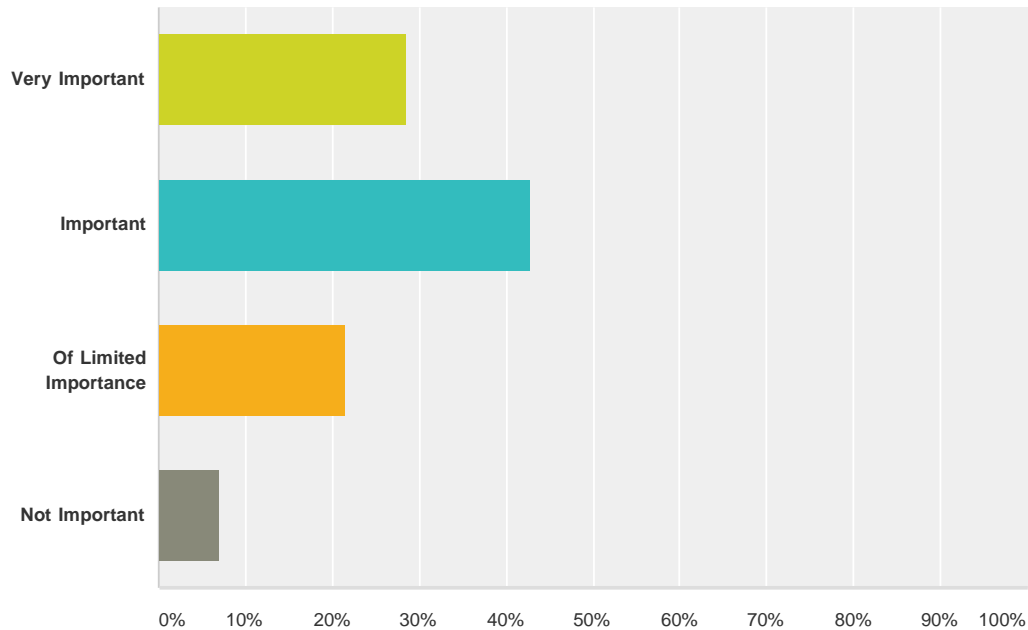
Answered: 14 Skipped: 0



Answer Choices	Responses
More Important	7.14% 1
of Equal Importance	71.43% 10
of Less Importance	21.43% 3
Not Important	0.00% 0
<b>Total</b>	<b>14</b>

### Q7 In the next 5 years, how important would it be to continue the Large Scale Acquisitions program to your library?

Answered: 14 Skipped: 0



Answer Choices	Responses
Very Important	28.57% 4
Important	42.86% 6
Of Limited Importance	21.43% 3
Not Important	7.14% 1
<b>Total</b>	<b>14</b>

#	Please elaborate	Date
1	Will depend on strategy going forward.	10/11/2016 1:19 PM
2	Depends on how LSA evolves and if the central funding targets emerging collection areas for the Big Ten Academic Alliance.	10/11/2016 1:05 PM
3	I think that the landscape is changing a bit, and it might be that we are - collectively - in a different place five years from now. That said, the program has brought good return to us for the investment, even in years when we had some portion of the content acquired already.	10/7/2016 12:46 PM
4	If the program were to change to become more valuable that would be great. On the other hand, perhaps those staff resources could be invested more effectively. I'd rather see them go to a program that offer more unique value and deeper BTAA engagement.	10/4/2016 7:41 AM
5	LSA will remain important until the current business models for publishing (and libraries) changes in a significant way. And even then, I can imagine LSA morphing into a fund for strategic initiatives that benefit the group.	10/3/2016 3:59 PM

**Q8 If the LSA program were to continue, what goals or strategies should we pursue in the future? (i.e., back files purchases, databases, major reference works, eBooks)**

Answered: 14 Skipped: 0

#	Responses	Date
1	Back files purchases and eBooks.	10/14/2016 3:13 PM
2	All of the above, plus new initiatives (see question 13).	10/14/2016 12:49 PM
3	Backfile purchases, databases	10/13/2016 3:04 PM
4	Back files and reference works are probably most valuable, as those tend to be of more "universal" use across institutions. Ebooks and databases are likely to be more specific to certain faculty needs, graduate programs, etc. and so are less likely to have value to everyone.	10/11/2016 1:19 PM
5	I think we should focus some funding open access publishing models. Continuing to focus on backfiles will certainly resonate but e-books should be more carefully evaluated. Do we have a collective framework for purchasing e-books? If so have our ebook purchasing strategy supported the framework? I would like to see LSA focus on recurring expenses.	10/11/2016 1:05 PM
6	eBooks and backfiles especially, but all of the above are vital to pursue	10/11/2016 11:08 AM
7	The LSA program should aggressively pursue acquisition of digital back files of serials, collections of ebooks, and digitized primary sources across the curriculum. BTAA should also investigate consortium-wide programs of evidence-based collection development, including demand-driven acquisitions. The program should support only one time purchases so that participating institutions are not stuck with future ongoing costs subject to annual inflation.	10/11/2016 7:03 AM
8	Today the T&F offer looks really good.	10/10/2016 1:22 PM
9	More clearly tying backfile acquisitions to other strategic initiatives. More clearly sharing out the financial information in savings, etc....	10/7/2016 12:46 PM
10	All of the above, if opportunities arise. One time purchases only. No multi-year commitments.	10/6/2016 11:20 AM
11	As goals, I would look for opportunities with media, data, streaming video or music. Backfiles are useful to clear shelf space. Leverage to reduce ebook prices would be helpful. We could talk with publishers about older digital products that are no longer "hot" -- the price could be far lower now. Accessibility is a priority (ADA compliance). I would continue the opt-in sidecar too, it covers some less essential situations but still leads to savings.	10/4/2016 8:13 AM
12	Focus should be on getting good deals on new products at the time of launch. It's a tremendous shame we missed the window on streaming media despite repeated pleas from the membership. Cutting "deals" tied to subscriptions has proven to be false economy, saddling us with low priority content that publishers want to sell. We want to cut databases, major reference works. We want high quality, high use e-books, but we're mostly buying those direct or through other consortia. We've already built out backfiles as they are available. If the program is to continue somehow it has to focus on the new products not the same old, same old.	10/4/2016 7:41 AM
13	Backfile purchases, other one-time purchases, such as ebook collections, buying down inflation on continuing resources (such as journal collections), purchasing historical/archival collections	10/3/2016 9:57 PM
14	Backfiles should be a priority, but we'll run out of major publishers willing to come to terms with the group. eBook collections should be a priority, but we need help managing the records and the title lists (pushing this further upstream). Digitized newspapers and historical sources are also good, so long as we build in some local choice.	10/3/2016 3:59 PM

## Q9 What do you like or dislike about the process of selecting resources for inclusion in the program?

Answered: 14 Skipped: 0

#	Responses	Date
1	I am concerned about the lack of transparency in the selection process.	10/14/2016 3:13 PM
2	Since this is my first year in the position, it's hard to comment. I'm currently serving on the LSA Advisory Board and look forward to learning more about the process. I can already say that it seems very democratic, transparent, and based on everybody's input.	10/14/2016 12:49 PM
3	I like that we have an opportunity to provide input to the sub-group about what to include, although I don't feel I have much say in what actually gets purchased.	10/13/2016 3:04 PM
4	Process has worked mostly fine, with most decisions made only after consultation and feedback from the full group.	10/11/2016 1:19 PM
5	I like collaborating with the other Big Ten institutions, and the flexible options the program provides so each members can decide if in fact they want to opt in for certain purchases.	10/11/2016 1:05 PM
6	Process works for us.	10/11/2016 11:08 AM
7	BTAA is proactive in discussing potential acquisitions with the Collection Development Officers group. BTAA personnel provide excellent data and other information about possible purchases. In addition, they do a great job at negotiating deep discounts and leveraging out contributed funds. The selection process could become a year-round rather than seasonal activity.	10/11/2016 7:03 AM
8	I neither like or dislike the process.	10/10/2016 1:22 PM
9	The communications about the program was - initially - very uneven. Over the last couple years, that communication has improved.	10/7/2016 12:46 PM
10	More consultation would be helpful	10/6/2016 11:20 AM
11	Using the sub-committee is a good system: rotating membership widens knowledge across our group.	10/4/2016 8:13 AM
12	The focus seems to be on rather tired content that we've already had many other chances to purchase and chosen to pass on. We don't seem to actually select the resources. We're pretty much told what is going to be bought and often have great difficulty determining what content is in the product which is actually going to be provided for our dollars.	10/4/2016 7:41 AM
13	I would like a little more transparency, especially in terms of know what are our priorities (so we can then direct local funds toward resources that are not priorities).	10/3/2016 9:57 PM
14	I like that this is handled by a small group, although I would be interested in wider discussion of leading targets (not just an invitation to make suggestions) before moving forward at Charleston. Could there be a multi-year plan so we can better see how LSA activities are balanced? Most important, though, is that we need to know the details of LSA actions asap, ideally before we are tempted to make our separate calendar-year end commitments.	10/3/2016 3:59 PM

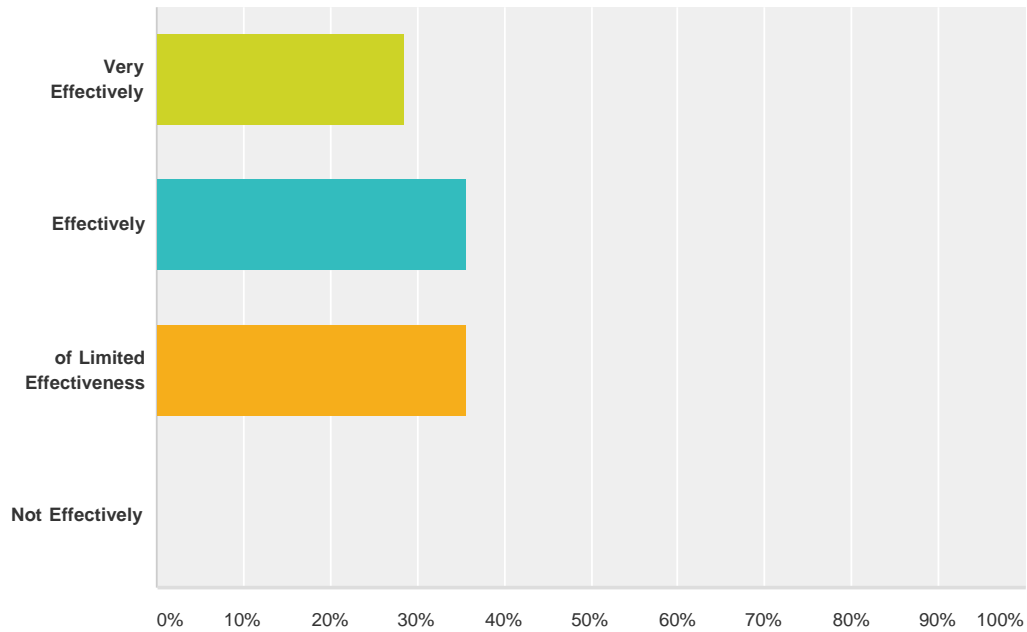
## Q10 What impact has the Large Scale Acquisitions program had on your collection management decisions?

Answered: 14 Skipped: 0

#	Responses	Date
1	The purchase of journal backfiles will enable us to withdraw some print volumes.	10/14/2016 3:13 PM
2	I have not been in the position long enough to comment well. I believe that the LSA will allow me to acquire large ticket items I might not otherwise be able to consider; its positive impact on including our other campuses in deals will also continue to be important. Lastly, while we are not withdrawing a the present time, I anticipate that, if space pressures increase, LSA purchases will help me make decisions about space.	10/14/2016 12:49 PM
3	We have been able w/d lots of content.	10/13/2016 3:04 PM
4	Back file purchases have allowed us to move print equivalents offsite and manage space differently.	10/11/2016 1:19 PM
5	In recent years we've been able to leverage LSA to purchase content that address some specific collection needs that were driven by faculty request and campus demand. LSA in general helps us retain better pricing for one-time content that we could not achieve as an individual institution or even partnering with other state institutions.	10/11/2016 1:05 PM
6	This allows us to spend more time on singular and focused purchases and not have to worry about those resources that are part of the LSA.	10/11/2016 11:08 AM
7	The LSA program has had an enormous positive impact on our collection management decisions. Since joining the BTAA, the material acquired through LSA have all been resources that our faculty and students have specifically requested. We would not have been able to provide our users with any of these resources on our own.	10/11/2016 7:03 AM
8	There is a dedicated dollar amount that will be spent.	10/10/2016 1:22 PM
9	Early on, I had complaints about the timing for the LSA acquisitions as well. They were, frankly, occurring too late in the fiscal year and, consequently, negatively impacted local decisions. This feedback was received and acted on as well. As a school with a lot of content, I think that the LSA's impact was less pronounced, but it has been there in the background.	10/7/2016 12:46 PM
10	Sometimes have acquired resources that are not priorities, no demand for their use.	10/6/2016 11:20 AM
11	We now consider the Big Ten libraries as a whole when thinking about access to resources (not just via LSA, also ILL). LSA deals lead to better one-to-one deals offered to us individually by vendors. Thinking about LSA has led us to think more effectively about use of reserves in general.	10/4/2016 8:13 AM
12	Very little other than that it's money we can't spend elsewhere.	10/4/2016 7:41 AM
13	Its aided somewhat in print management decisions. It's had more of an impact on collection development (new acquisitions).	10/3/2016 9:57 PM
14	We sometimes defer on licensing content we think may be a good future candidate for LSA. If we feel a need to license before there's review for LSA, we sometimes tell the vendor we expect to pay the final CIC negotiated price, should there be one. Complete publisher eBook collections (for example) have helped us move away from title-by-title selection of monographs. Sometimes LSA includes things we would not have chosen to license, so it's easy to think that that keeps us from serving our campus. That strikes me as probably an overstatement. I tend to look at the value of the LSA program as a whole, rather than as separate product-level decisions.	10/3/2016 3:59 PM

### Q11 How effectively have the activities of the Large Scale Acquisitions Advisory Board been communicated to the stakeholders?

Answered: 14 Skipped: 0



Answer Choices	Responses	Count
Very Effectively	28.57%	4
Effectively	35.71%	5
of Limited Effectiveness	35.71%	5
Not Effectively	0.00%	0
<b>Total</b>		<b>14</b>

## Q12 Should some Large Scale Acquisitions funds be used for recurring collection investments? If so, can you elaborate?

Answered: 14 Skipped: 0

#	Responses	Date
1	No.	10/14/2016 3:13 PM
2	I would be interested in exploring this. During my short time in the position, big-ticket offers requested by faculty for recurring sources have come my way. It would be good to have the BTAA negotiating power involved with this kind of resource.	10/14/2016 12:49 PM
3	There are definitely times when it might be beneficial for funds to go towards recurring collection investments, given it's for collections that all participating BTAA agree on. Possibly large front file ebook collections.	10/13/2016 3:04 PM
4	The idea has some appeal, but it would require a careful re-thinking of the entire program and the ways funds are managed at each institution, especially if a large amount of recurring resources (and associated dollars) were managed centrally. Perhaps a model where the BTAA had a greater role as a central negotiator is a viable middle path.	10/11/2016 1:19 PM
5	Yes. I think we should explore some options with our large STEM publishers.	10/11/2016 1:05 PM
6	if the logistics can be worked out, sure.	10/11/2016 11:08 AM
7	Absolutely not. The single most destructive pressure on collections budgets is inflation on recurring costs. LSA funds should never be used for continuing costs. This would member institutions with future commitments including significant ongoing inflation.	10/11/2016 7:03 AM
8	Yes! If a better deal can be made over a three year agreement than one then yes!	10/10/2016 1:22 PM
9	I have said this enough that I will sound like a broken record, but If LSA funds are used for recurring acquisitions, the recurring costs should stay on the LSA's tab. This was something that the previous CLI Director was loath to do as it would mean that he needed to go back to the membership to justify getting more resources. However, what ended up being created instead were multiple local problems as member institutions had to figure out how to keep particular resources.	10/7/2016 12:46 PM
10	No.	10/6/2016 11:20 AM
11	No. This will hollow out the funds, or force our hands to pay with dollars that are outside LSA.	10/4/2016 8:13 AM
12	No.	10/4/2016 7:41 AM
13	No	10/3/2016 9:57 PM
14	Only by exception, and to leverage a special opportunity -- and without laying claim to non-LSA funds unless there is prior agreement by the participating libraries. If LSA helps us get a better deal, without padding with publisher offerings we don't care about, and without locking in the title list and the increases for too long, starting with LSA makes some sense. If the group wants to continue to make the recurring investments, at some point the product should roll off the LSA books, on back into the general consortial licensing bucket.	10/3/2016 3:59 PM

**Q13 Should some of the funds be considered for other initiatives other than collections? (i.e., digitization projects, publishing, new purchasing models, open access)**

Answered: 14 Skipped: 0

#	Responses	Date
1	It's difficult to say what else we want to invest in general terms. Funding new purchasing models is of some interest to us, but we have to see the specifics first.	10/14/2016 3:13 PM
2	Yes - part. new purchasing models and open access.	10/14/2016 12:49 PM
3	Yes, new purchasing models, OA.	10/13/2016 3:04 PM
4	Yes. We contend, though, that examples listed (digitization projects, publishing, open access) really are "collections initiatives," just not purchasing initiatives. For sure, thinking about our collections program as being more than just purchasing--but also improving access to information resources--is a good direction for us to be looking.	10/11/2016 1:19 PM
5	Open access would be a good place to start. We should also consider funding some of shared print expenditures from LSA funding.	10/11/2016 1:05 PM
6	Digitization and new purchasing models make sense, but to start with pilots would be best.	10/11/2016 11:08 AM
7	No. The LSA provides a valuable service in leveraging deep discounts for acquisition of collections. If the BTAA is interested in any of these other initiatives, they should be planned, conducted and funded as programs separate from the LSA program.	10/11/2016 7:03 AM
8	Not in my opinion.	10/10/2016 1:22 PM
9	As I recall, the directors considered and rejected a BTAA self-funding model for digitization projects, etc... a couple years ago. I think that one would be great. I don't think that it should replace the LSA but rather be a new program. I asked the same thing about why there was no CIC Imprint for publishing after the conference several years ago in Columbus. There is room here. If Nature can propose \$12,000 per new title with six titles, I imagine that we could each kick in \$20,000 to start up a publishing arm.	10/7/2016 12:46 PM
10	Possibly, if opportunities arise.	10/6/2016 11:20 AM
11	Yes: all of these are part of collection development.	10/4/2016 8:13 AM
12	Yes - I would very much prefer these be treated as innovation and collaboration funding. If they were envisioned to support content and access that would be much more flexible.	10/4/2016 7:41 AM
13	Not for anything, but in certain cases, such as with Reveal Digital, it makes sense. Same with experimenting with new acquisition models. Projects that impact collection management or development make sense. This could be a slippery slope, however.	10/3/2016 9:57 PM
14	Yes, but I see all these initiatives as directly related to collections.	10/3/2016 3:59 PM



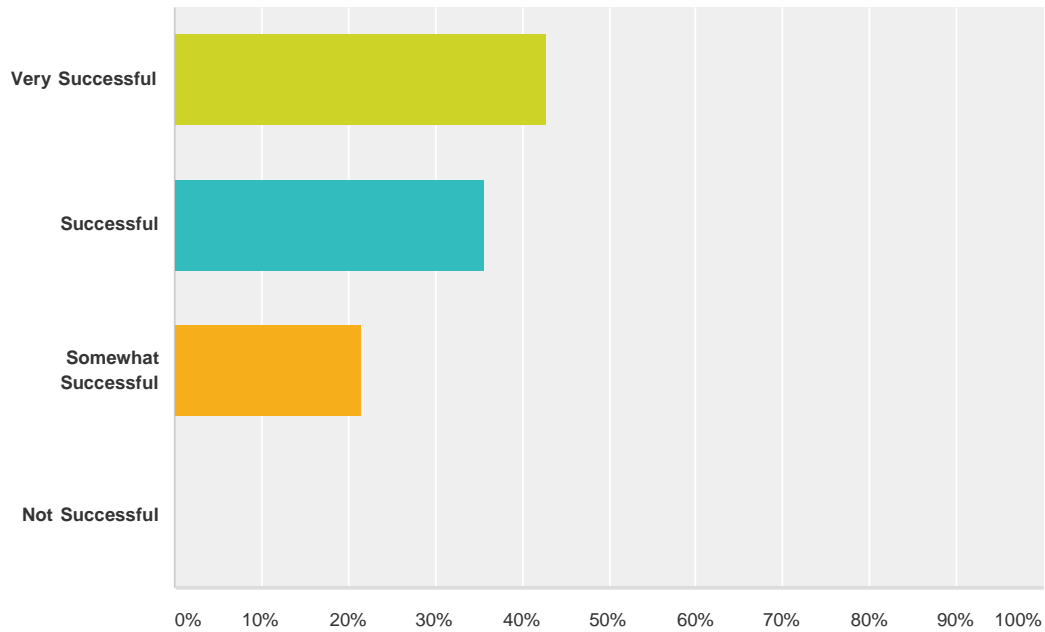
## Q14 What additional comments or concerns would you like to share about the program?

Answered: 14 Skipped: 0

#	Responses	Date
1	None.	10/14/2016 3:13 PM
2	I understand from conversations with colleagues that one of the challenges of the program is effective and timely communication, as the LSA decisions affect local decisions, and that the BTAA staff have tried very hard in the past few years to make that communication more effective and timely. This is very much appreciated.	10/14/2016 12:49 PM
3	Our liaison librarians are, overall, happy with the LSA program. There seems to be an emphasis on humanities and social sciences, and our engineering/sci/tech folks dislike that aspect of it. We realize the importance of collective purchasing, even if some of the content purchases is low priority to Purdue. We would like to see the program continue.	10/13/2016 3:04 PM
4	None.	10/11/2016 1:19 PM
5	No additional comments.	10/11/2016 1:05 PM
6	no comments or concerns.	10/11/2016 11:08 AM
7	For the University of Maryland, the LSA program is the second most important benefit we realize from our BTAA membership after consortial licensing. As far as is possible, the BTAA should make LSA a permanent ongoing program. BTAA should develop and maintain a robust data warehouse regarding cost, use, savings and other relevant metrics for materials acquired through LSA, as well as examples of how students and faculty have successfully employed these resources. This type of quantitative and qualitative assessment would be useful at both the consortial and local levels.	10/11/2016 7:03 AM
8	The commitment to LSA is important. Knowing that X amount of the library's budget will be used for this type of purchase insures that content will be made available at a great deal. I know that UNL has participated in multi-year deals and has benefited by being a part of the LSA. I was unsure about how to respond to many of the questions.	10/10/2016 1:22 PM
9	(an answer)	10/7/2016 12:46 PM
10	Again, we would like to see the program limited to one-time expenditures.	10/6/2016 11:20 AM
11	Licensing work done by the Big Ten office is helpful, saves us time. Dollar savings have been significant.	10/4/2016 8:13 AM
12	The advisory committee has not been used effectively to inform decision-making in my experience and in the reports I hear from others. It tends to be informed rather than consulted and the advice given has not been heeded. The selection of representatives seems to have tended toward involving CDOs when they are least experienced and least connected to their colleagues.	10/4/2016 7:41 AM
13	N/A	10/3/2016 9:57 PM
14	At some point should we be licensing data as a group, to feed the geospatial portal?	10/3/2016 3:59 PM

**Q15 Extend the breadth and depth of resources available to all students, faculty, and staff at the member universities.**

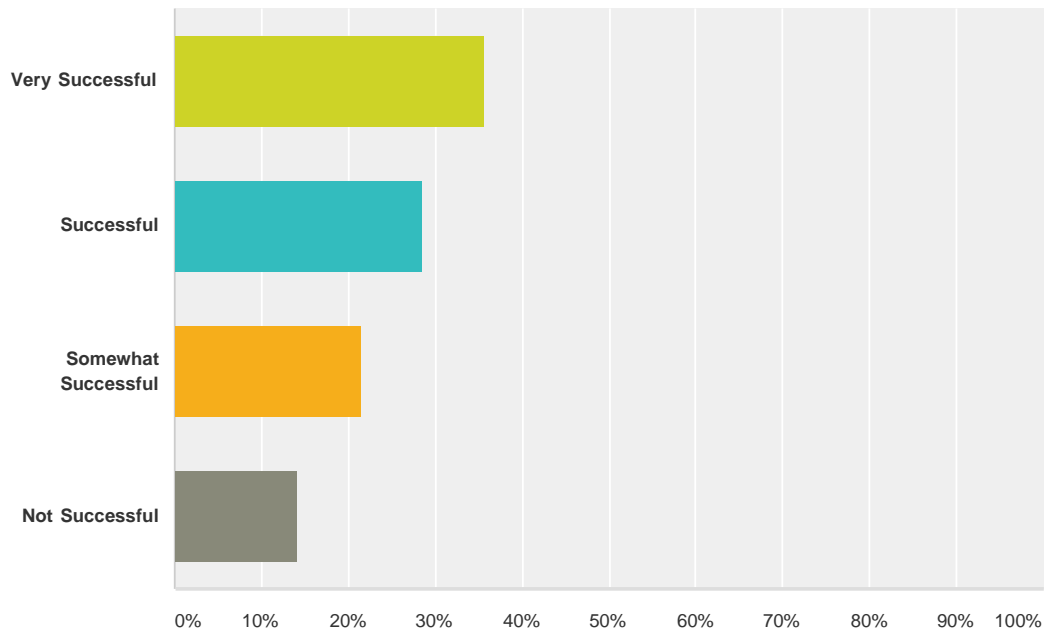
Answered: 14 Skipped: 0



Answer Choices	Responses
Very Successful	42.86% 6
Successful	35.71% 5
Somewhat Successful	21.43% 3
Not Successful	0.00% 0
<b>Total</b>	<b>14</b>

**Q16 Foster higher levels of collection coordination across member libraries to realize greater predictability for users about the availability of certain core holdings, and at the same time enabling each of our libraries to allocate greater staff time and funding to the development of more specialized and unique resources.**

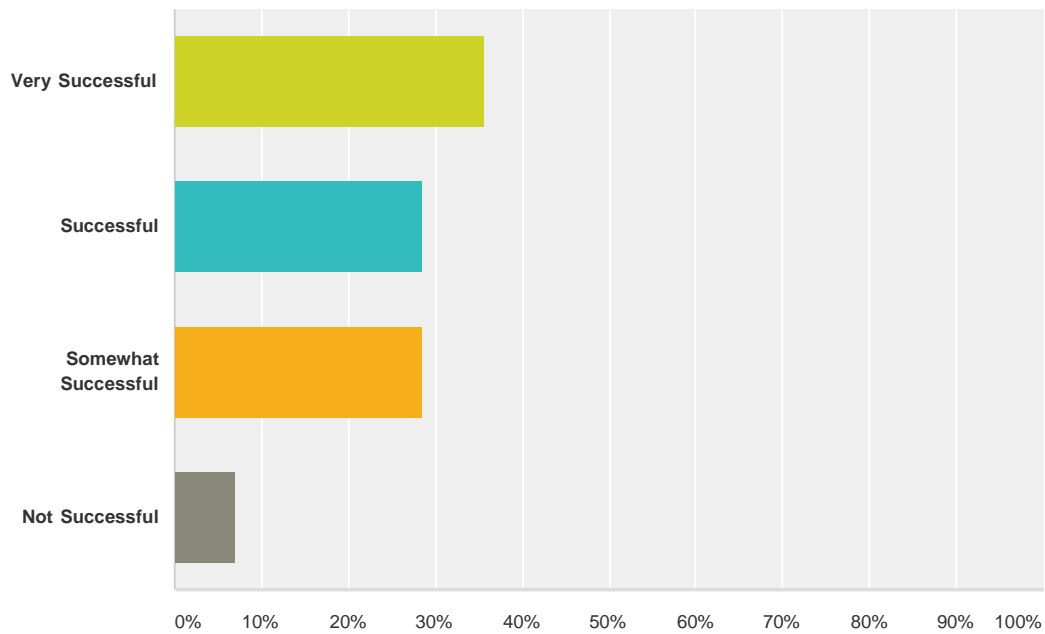
Answered: 14 Skipped: 0



Answer Choices	Responses
Very Successful	35.71% 5
Successful	28.57% 4
Somewhat Successful	21.43% 3
Not Successful	14.29% 2
<b>Total</b>	<b>14</b>

**Q17 Use the collection funds of universities to advance the individual and collective strategic and operational objectives of our libraries and campuses.**

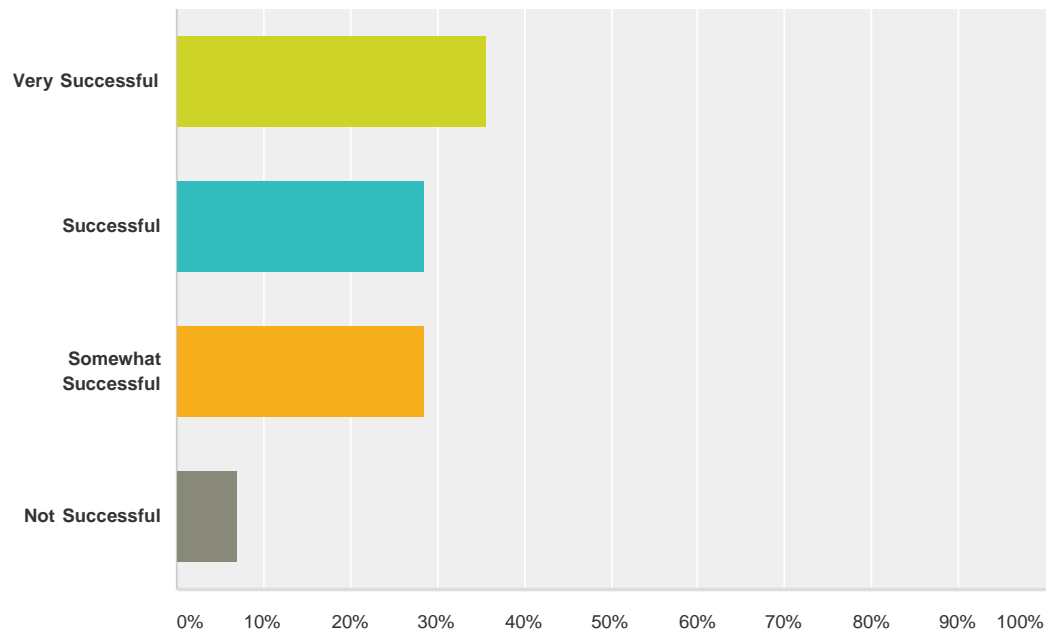
Answered: 14 Skipped: 0



Answer Choices	Responses
Very Successful	35.71% 5
Successful	28.57% 4
Somewhat Successful	28.57% 4
Not Successful	7.14% 1
<b>Total</b>	<b>14</b>

**Q18 Make the acquisition and licensing of electronic resources as efficient and timely as possible, but without compromising the opportunity for member libraries to adequately review and consider proposals.**

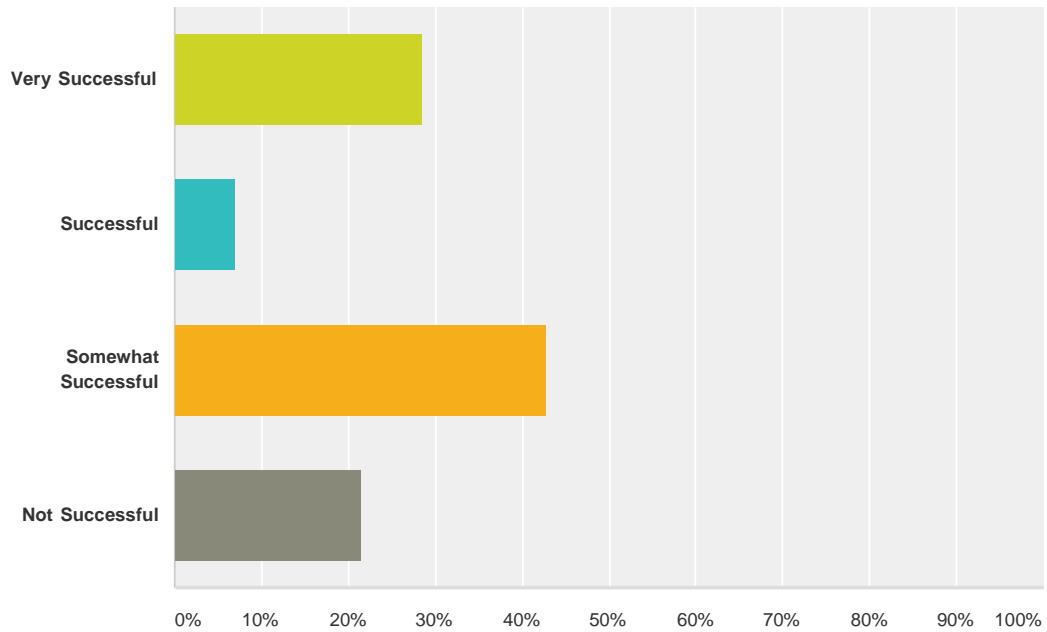
Answered: 14 Skipped: 0



Answer Choices	Responses
Very Successful	35.71% 5
Successful	28.57% 4
Somewhat Successful	28.57% 4
Not Successful	7.14% 1
<b>Total</b>	<b>14</b>

### Q19 Influence the underlying terms being offered by commercial publishers and transform the direction of scholarly communication.

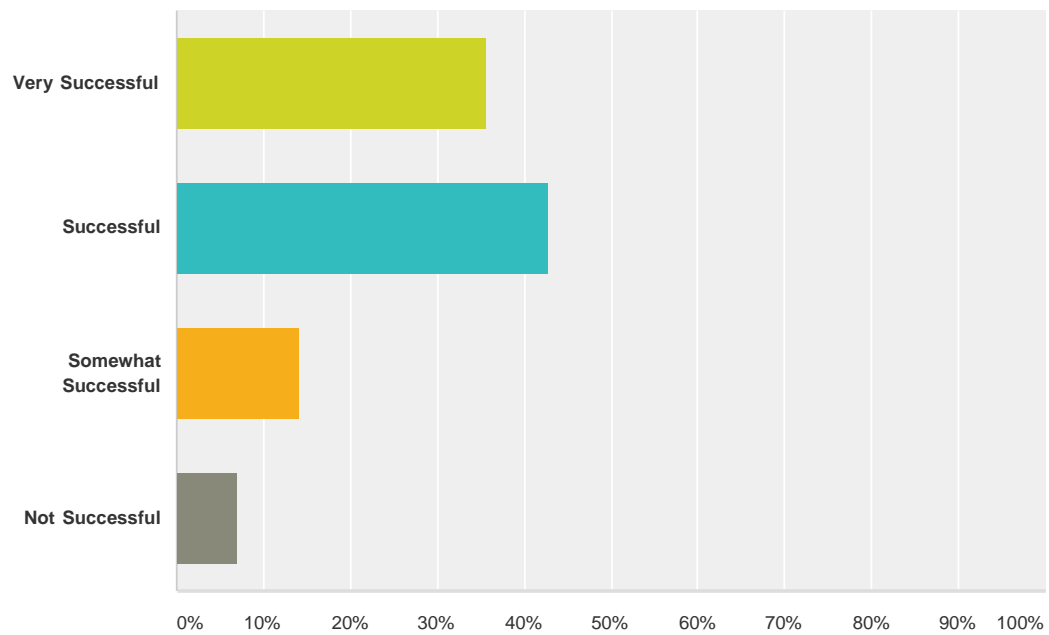
Answered: 14 Skipped: 0



Answer Choices	Responses
Very Successful	28.57% 4
Successful	7.14% 1
Somewhat Successful	42.86% 6
Not Successful	21.43% 3
<b>Total</b>	<b>14</b>

### Q20 Secure archival rights and protections for licensed content as appropriate.

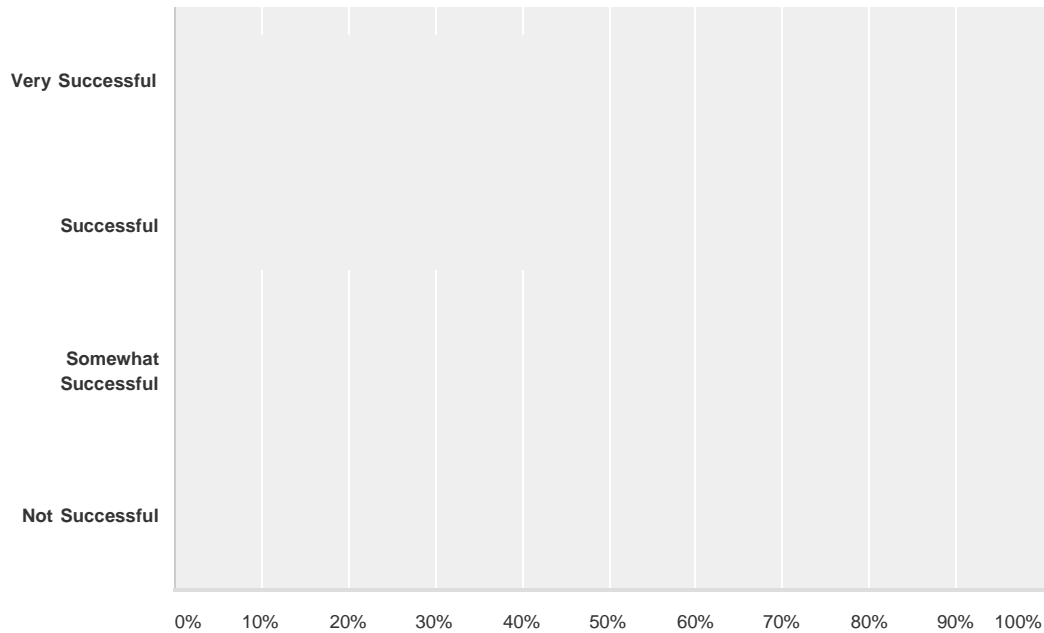
Answered: 14 Skipped: 0



Answer Choices	Responses
Very Successful	35.71% 5
Successful	42.86% 6
Somewhat Successful	14.29% 2
Not Successful	7.14% 1
<b>Total</b>	<b>14</b>

**Q21 Provide transparency and accountability for agreements so members clearly understand the principles by which costs and benefits are allocated among member institutions.**

Answered: 14 Skipped: 0



Answer Choices	Responses
Very Successful	42.86% 6
Successful	42.86% 6
Somewhat Successful	7.14% 1
Not Successful	7.14% 1
<b>Total</b>	<b>14</b>





November 10, 2016

### **Big Ten Large Scale Acquisition Program**

In 2008 the Big Ten library directors approved the creation of a Large Scale Acquisition Program. A central pool of dollars from member contributions would effectively serve members by actively creating and focusing on the acquisition of larger compilations of content with greater potential for notable savings and/or strategic benefit. Big Ten staff from the Library Initiatives division and a small advisory committee seek to acquire content for participating members that: involves significant content; saves money; benefits seven or more libraries; advances promising new models of scholarly communications; leverages the value of existing content by advancing integration and interoperability; and contains ancillary benefits that support other projects or goals of the Big Ten.

#### **2017 Purchase: \$200,000 plus additional \$50,000 opt in    Date of Purchase**

IOP Backfiles	Oct 2016
Adam Matthew Databases	Nov 2016
Reveal Digital Music Modules	Nov 2016
Sage Shallow Backfiles	Nov 2016
Sage Deep Backfiles (opt-in)	Nov 2016
Springer non-subscribed Journals	
Thomson Web of Science Platform (3 <sup>rd</sup> payment)	
Cambridge STM Journal Backfiles (3 <sup>rd</sup> payment)	

#### **2016 Purchase: \$200,000 plus additional \$50,000 opt in    Date of Purchase**

Oxford Science & Medical Archives	Jan 2016
Oxford Humanities and Social Science Archives	Jan 2016
Springer non-subscribed Journals	Jan 2016
Wiley Backfiles ( <i>opt-in</i> )	Mar 2016
Thomson Web of Science Platform (2 <sup>nd</sup> payment)	
Readex JPRS (2 <sup>nd</sup> payment)	
Cambridge STM Journal Backfiles (2 <sup>nd</sup> payment)	

#### **2015 Purchase: \$150,000 plus additional \$50,000 opt-in    Date of Purchase**

Thomson Web of Science Platform	Oct 2014
Alexander Street Press Video Products	Oct 2014
Nature Palgrave Backfiles	Dec 2014
Cambridge STM Journal Backfiles	Dec 2014
Readex JPRS	Dec 2014



ACADEMIC ALLIANCE

IEEE Journal Archives (*opt-in*)

Jun 2015

**2014 Purchase: \$150,000 plus additional \$50,000 opt-in** **Date of Purchase**

Adam Matthew

Nov 2013

Springer Book Archive

Nov 2013

Nature Backfiles

Dec 2013

ProQuest Executive Documents (*opt-in*)

Jan 2014

**2013 Purchase: \$150,000 plus additional \$50,000 opt-in** **Date of Purchase**

Thomson Book Citation Index 2014

Nov 2012

19<sup>th</sup> Century Collection Online, Parts 1-4

Nov 2012

African American Imprints

Dec 2012

Reveal Digital

Feb 2013

African American Periodicals (*opt-in*)

Dec 2012

**2012 Purchase: \$150,000 plus additional \$50,000 opt-in** **Date of Purchase**

Scientific American Archive & Site License

Nov 2011

Thomson Social Sciences Citation Index 1900-1955

Dec 2011

Thomson Book Citation Index 2012-2013

Dec 2011

ProQuest Statistical Data Sets

Jan 2012

Ashgate 2012 e-Books

Jan 2012

The Lily

May 2012

Vogue Archive (*opt-in*)

May 2012

Ashgate 2010-11 (*opt-in*)

May 2012

The Civil War Collection (*opt-in*)

May 2012

**2011 Purchases: \$150,000 plus additional \$50,000 opt-in** **Date of Purchase**

Periodical Archives Online: Part 7 & 8

Nov 2010

Periodical Archives Online: Part 6 (*opt-in*)

Dec 2010

Early American Newspapers: Parts 6 & 7

Dec 2010

Brill eBooks: 2007-10 (1,529 backlist titles)

Oct 2010

Brill eBooks: 2011-2013 (~ 1,050 front list titles)

Oct 2010

Elsevier Book Series: 2007-11 (~ 775 volumes)

Jan 2011

IEEE eBooks: 1974-2011 (*opt-in*)

May 2011

**2010 Purchases: \$100,000**

**Date of Purchase**

Elsevier eBooks 2010

Dec 2009

Elsevier eBooks 2008-09

Dec 2009

Wiley eBooks 2009

Dec 2009

Wiley eBooks 2007-08

Dec 2009



ACADEMIC ALLIANCE

**2009 Purchases: \$100,000**

Eighteenth Century Collections Online II

Literature Criticism

The Sixties

**Date of Purchase**

Dec 2008

Dec 2008

Dec 2008

**2008 Purchases: \$100,000**

Gale Historic Newspaper Products

**Date of Purchase**

Dec 2007