Exploring the Subject Librarian Role in eBook Purchase Processes

A Quality Improvement Study
December 2021

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Table of Contents

Figures & Tables

About the Author

Jennifer Farthing is a learning leader with more than 25 years of experience envisioning and creating highly specialized educational materials that help learners distill challenging concepts and incorporate new knowledge into life, work, and behavioral scenarios. She leverages evidence-based strategy and professional experiences across a variety of industries to design the most relevant, impactful content possible. Currently, Jen is Senior Vice President, Learning for SAI360, a global ethics and compliance learning provider to Fortune 500 companies. She leads a large, global community of practice comprised of product managers, product marketers, instructional designers, visual designers, editors, producers, developers, subject matter experts, and project managers. Jen is a member of SAI360's executive leadership team, and from 2018-2020, was a member of the World Economic Forum's Chief Learning Officers Work Group and its Initiative on the Future of Education, Gender, and Work. Prior to her career in corporate learning she worked in publishing and EdTech for a variety of publishers and service providers.

Jen is a lifelong learner. She holds a Master of Science in Education and a graduate certificate in instructional design; a Master of Arts in English and a Bachelor of Arts in English, as well as a Leaders of Learning certificate from HarvardX. She is a certified yoga instructor, retired marathon runner and avid reader. She lives in New York with her husband Michael and their Affenpinscher, Martine.

Dedication

I started this adventure in January of 2019, taking many online classes from work trips around the globe, and doing my "async" on too many Lyfts, trains and airports to count. I'm grateful to the Marriott and the Delta Sky Club for always having reliable wifi. 2020-2021 was intense, challenging, sad, scary, unexpectedly excellent at times, and an all-around wild ride. I'm mindful that the pandemic gave me the gift of time for two thirds of this program—grounded, quarantined, and light on social obligations, there wasn't too much to miss out on while "staying inside" to do schoolwork. This past year in particular, I learned how to ask for help. That has been my greatest lesson. When I accepted this challenge at age 52, I figured I had all the time in the world to finish, at my own pace. I was urged to go "full-time" to enjoy the support and camaraderie of my cohort. I didn't think that would matter. I was wrong. To Cohort 5—I value your friendship, feedback, steady support, lots of laughter, excellent brains, and sound statistics tips. To the faculty of Leadership and Learning in Organizations: I learned so much from you in these past three years—thank you. Your encouragement will stay with me always. Thanks to my capstone advisor, Dr. Quinn Trank for terrific feedback, support, and helping me connect to the marketing story. It's a better project thanks to your input.

To Dr. Brenda Boyce who has been my inspiration for this entire academic second act, and to Dr. Marsha Ershagi Hames for showing me how to balance work and school while having a life, this doctor thanks you both. To Dr. Jill Biden, thank you for reminding us to insist we be called doctor. A heartfelt thanks to my editorial support team—Sandy, Sally, Dana, Brigit, and Carla. Each of you knew the words I wanted to say when I strayed from my point, and you help me say them better. It's been instructive to have the shoe on the other foot. Thank you to my husband Michael for keeping me well-fed and well-loved on not just this endeavor, but an unexpected Master of Science, three yoga certifications, and a marathon—all at a time in life when most people are done with school and hours of training. I promise you this is a terminal degree. Thanks to lifelong friend Kristen for checking in on me, to my brothers Ted and Nick for their well-timed advice, my godmother Mary for believing in my capabilities, and to my Mom who has supported me this whole time and gave me space to write when I needed not to be disturbed. Thank you to "EPP" for turning me on to the idea of scholarly sustainability and rekindling my love of libraries and research. Who knew it would lead me here? Big thanks to Sarah G, Sarah K, Val, and Cathy for your collaboration. Thank you to LRN and SAI360 for supporting my coursework and providing opportunities to put my new skills to use on the job. To the subject librarians, and all the other librarians who shared their stories with me and completed my survey—thank you! And a final thanks to all the librarians who instilled in me a love of reading, a respect for scholarship, and inspired a career that rewards resourcefulness.

Executive Summary

For scholars, the academic library is a critical destination housing information, research materials, and sound advice on how to use available tools. During the past 25 years, electronic versions of journals and books have become widely available. Since the COVID-19 pandemic, the eBook has become more acceptable as a critical resource. Now, improvements to the availability, user experience, and purchase processes of eBooks must develop accordingly.

My partner organization was an original provider for electronic academic material. In honoring its request to keep its identity confidential, they are referred to as "eBook Platform Provider" or EPP. EPP was among the first providers to convert research to downloadable PDF formats. In nearly10 years of eBook trade with libraries, its business has matured at a steady rate. In the last several years, however, academic libraries have changed as the volume and type of digital resources have exploded. This has raised a concern with EPP that it must refine its marketing for academic libraries. In particular, a better understanding of subject librarians may, it believes, hold the key to capturing information about how to better serve this market.

This project focuses on the ways subject librarians contribute to the purchasing process. It includes factors subject librarians find important when deciding what to acquire given their budget allocations. In the university setting, subject librarians select, develop, and manage the budget for specific collections of library materials in all formats. They act as primary liaison for faculty, work as a dedicated reference resource for all users, and support teaching and learning activities within the academic departments assigned. In short, subject librarians are an indispensable part of that which allows the university to function as it does.

The purpose of this study is to better understand the subject librarian's role in eBook purchasing to help EPP improve its service to subject librarians. Ultimately, this insight will increase its marketing effectiveness.

Problem of Practice

Although EPP has furnished academic libraries with digital resources for many years, it does not know its subject librarian stakeholder well—from their selection criteria to how they interact with others in their purchase workflows. Simply put, they need to get to know this customer better. Gaining intelligence on the purchase process, recognizing the factors that inform eBook purchases, and exposing the sphere of influence subject librarians have on eBook purchases, will likely improve EPP's marketing efforts.

This improvement will likely result in a more assured, sustainable future in providing eBooks to academic users. Furthermore, the client organization believes that today's newer librarians may not be as attuned to its unique offering as the retiring librarians have been, causing a marketing challenge. Building closer relationships with subject librarians creates opportunities for my partner to speak to its unique value proposition.

Literature Review, Conceptual Framework, and Research Questions

The literature reviewed focuses on an array of eBook purchase processes, plans, formats, and decision criteria, as well as an in-depth examination of the subject librarian role. To situate

the subject librarian in the context of a purchasing workflow, other roles at the library were surveyed in the literature, as well as faculty and other constituents' perceptions of the process. Using a framework designed to identify stakeholder roles and responsibilities in the intermediated prepurchase and purchase process (Rossomme, 2003), these research questions intend to explore emergent academic library purchase processes at very large research institutions and how the subject librarian is involved therein.

1. ***How does the subject librarian participate in the selection and the purchase of eBooks at very large research institutions?***

   Finding: "The customer" is revealed not to be a single buyer. Instead, it is more accurately a group of informed stakeholders who collectively influence the purchase decision. Subject librarians are critical members of this group because they allocate their departmental purchasing budget and represent end users (faculty, researchers, and students).

   In each subject librarian interview, the ways in which newer, on-demand purchase processes have changed and influenced the purchase process surfaced. Despite the ways all the librarians contextualized their job role as first and foremost a selector of eBooks, in the data, the actual "selecting" of eBooks often happened by the user, via demand-driven acquisitions (DDA) plans.

   Some of the subject librarians also participated in evidence-based acquisitions (EBA) plans, which also impact the way eBooks are bought. Unlike the DDA plans, the subject librarian is integral in EBA plans. Making on-demand processes more collaborative, better supported, and less complicated is a need conveyed by the subject librarians to help them be more successful.

2. ***What factors do subject librarians consider in selecting eBooks for their collections?***

   Finding: The subject librarian's designation as "selector" of eBooks is helpful for EPP to understand. This is especially so in determining the factors that influence decisions on what to buy. As a mediator between the acquisitions process and faculty and student users, the subject librarian represents each of those interests in any decision-making process. Therefore, the factors considered represent those of the buyer and those of the user, as interpreted by the subject librarian.

3. ***How do on-demand acquisitions processes impact the role of the subject librarian at very large research institutions?***

   Finding: The subject librarian's role is multifaceted. The way eBooks are purchased is rapidly changing. This transformation has direct bearing on the subject librarian's job. As the intermediary between the eBook platform provider and end users, this relationship is essential. It must be better understood.

   Subject librarians care about helping their constituents access needed materials in predictable ways that are consistently useful. The support of faculty in research pursuits and in classroom instruction remains a primary goal for subject librarians. Ensuring a library's collections are discoverable, well-rounded, unbiased, and beneficial to all is equally essential. When subject librarians are enabled to select the eBook provider that makes needed content available, and in addition makes it easier to use, these professionals do what

they can to make it an educational reality. In helping to create intelligent, information-literate, contributing members of society, the work of subject librarians is given purpose.

Research Design

Deploying a qualitative research approach, subject librarians from "doctoral universities with very high research activity," commonly referred to as R1 institutions, were interviewed to learn about their roles in the purchase process. Only these very large customers were subjects of interest in order to constrain, or bound the study. They were chosen because their significant institutional purchases have outsized impact on the client organization. Subject librarians discussed their roles and responsibilities, focusing on their views on purchase plans and purchase options available. They conveyed complex challenges and ways in which they overcame difficult circumstances at the library before, during, and in the aftermath of the COVID-19 pandemic.

Recommendations

1. Although the primary business partner is typically the acquisition librarian, EPP should **appreciate the subject librarian as another critical stakeholder of the purchase process.** Know this customer. Theirs is a linchpin role, which serves to better understand the needs of the scholarly end users—students, faculty, and researchers alike. Direct the information in this study toward creating fulsome subject librarian personas, and acknowledge how the role has changed. As intermediaries, they speak in two languages—that of the discipline specialist and that of the information seeker. Managing this awareness is vitally important to success and sustainability.

2. If on-demand plans represent the selection and purchase method of choice for the future, EPP should work with the subject librarians directly to **provide them with better tools, insights, and advice.** Create data analytics dashboards so information can be more immediately available. Make reports more user-friendly. Support evidence-based, on-demand models in predictive, deliberate ways, using the data collected over years of service as a leading provider of digital, academic library materials.

3. Use EPP's vast stores of metadata to **help subject librarians build diverse, inclusive, and unbiased collections.** When this is done intentionally, influential subject librarians are supported in their collection management. In turn, these partners may become dedicated brand ambassadors.

4. **Create dedicated roles that assist subject librarians in their teaching, learning, and reference duties.** EPP can help them make compelling library guides by using their data to curate what is most useful for students. Ensure the subject librarians know, understand, and appreciate EPP's generous access rules that denote on-demand purchases, and they will help build loyal users.

I. Introduction

Today's scholarly research is aided by digital resources, enhanced by online search tools, and dependent on the availability of and access to scholarship. Librarians determine what resources are available to researchers, so they are an important link to the platforms that host these research materials and render them discoverable. My partner organization is a leading, global provider of electronic resources to libraries. To protect confidentiality, I refer to it as eBook Platform Provider (EPP).

As digital platforms grow and expand in the marketplace to offer more types of resources, such as eBooks, buyer criteria that factor into purchasing decisions are evolving. As a result, the marketing methods to reach and retain these decision-makers must also change. Today, effective marketing centers on service. The value of a product or service is determined by the customer. Effective providers of services communicate value propositions back to their customers in ways that demonstrate that they have been heard. In this method of exchange, value is cocreated (Lusch and Vargo, 2016, 2018).

Strategic marketers draw customers to their services by engaging them in ongoing conversations to understand what motivates them to buy. Rather than simply focusing on features and benefits, successful marketing positions services in ways that demonstrate how they solve problems for buyers. The focus shifts from simply advertising and promoting services to delivering value to customers. Importantly, marketers must be authentically interested in their customers' interests and experiences. In this way, they compete for customers' attention on the customers' terms, not on their own (Helkkula and Kelleher, 2010).

To transform its marketing strategies, EPP must develop its knowledge of the contemporary librarian customer—understanding how job roles, functions, and preferred ways of

purchasing have advanced. Seeking authentic customer insight affords EPP opportunities to reestablish trusted relationships with librarians, enabling deeper customer engagement and greater value. This co-constructed value will, in turn, help librarians serve their constituents in meaningful ways that form lasting, positive impressions of the EPP brand. Through librarians, EPP establishes a connection to its end-users that permits sustainable, repeat usage of its services over time. EPP has lamented not being able to market directly to users, but if it transforms its marketing methods to focus on its connection to their librarian customers, it won't have to.

Uncovering librarians' decision-making processes and their role in eBook purchasing is the focus of this study. For EPP's marketing department, I have investigated how librarians purchase eBooks and explored the nature and magnitude of the influence they have on usage. This is important for EPP and, more broadly, for recognizing how university library collections are formed.

On EPP's behalf, I have explored the buyer decision-making processes, factors that inform these choices, and job responsibilities of subject librarians. Historically, EPP has primarily worked with acquisitions librarians—those whose primary roles are in business operations, such as negotiating and managing licensing terms and payments. However, the real decision-making for buying eBooks starts with *subject librarians*. Subject librarians link eBooks to users. They are the intermediary. They work closely with other university librarians to acquire, collect, and manage learning materials for their constituents; offer teaching and learning support to their constituents; and field faculty requests for scholarship to build and shape their university collections. I evaluate how librarians at large, top-tier research universities engage with providers and determine plans for eBook selection. This research aims to help my partner organization connect with today's subject librarians who are involved in the increasingly complex task of

purchasing eBooks. I have focused this study on large institutional buyers, which have the

greatest impact on sales: those with Carnegie Classification, "Doctoral Universities: Very High

Research Activity" (DUVHRA), commonly referred to as R1 universities.

(https://carnegieclassifications.iu.edu/).

The purpose of this study is to better understand the role of subject librarians in eBook

purchase decisions and how their influence on users informs that process. This insight is vital for

EPP marketing so it can build a service-oriented relationship with its librarian customers. By

focusing on increasing value for librarians, EPP will bring greater satisfaction to faculty and

student users. Investing in deliberate, customer-centric marketing strategies may result in

increased sales and aid in EPP's sustainability mission of preserving the academic record in

partnership with libraries.

II. Organization Context

EPP's customers are the university librarians who purchase learning materials for their

constituents. In this context, the availability of and access to eBooks is intermediated. That is,

someone (librarian) executes the purchase on behalf of the university's end users (faculty,

students). Librarian-intermediaries take users' needs into consideration when engaging in

purchases. EPP has long-standing and trusted relationships with librarians who first became

acquainted with its platform services in the 1990s and have remained brand-loyal ever since. A

very high percentage of its existing library customers continue to renew licenses to access its

digital journals and other resources year over year. Many of these loyal librarian customers are

retiring or approaching retirement, and a newer generation of librarians are becoming key

decision-makers. This situation presents an opportunity for EPP to build relationships with

today's librarians using service-oriented marketing strategies to learn how they perceive value.

EPP has relied on time-tested marketing tactics, such as advertising and promoting large, digital journal collections directly to librarians. This practice has served EPP well for journals, but eBook marketing presents new challenges to overcome. With the addition of eBooks to its platform 10 years ago, EPP's service offering shifted. This business challenge requires adapting to the needs of customers and finding new ways to partner with them in cocreating value. For instance, there are many more academic book titles than there are journal titles, so categorizing them into advertised "collections" as EPP has done for journals does not align with the multiple ways eBooks are bought at institutions. In some ways, the eBook purchase process mimics how print books are chosen by libraries, but in other, emerging ways, EPP's searchable eBook platform itself enables different purchase methods based on access data. Complexity in the eBook purchase process adds to EPP's business challenge.

At university libraries, the institutional purchase process for eBooks is commonly referred to as *acquisitions*. To understand the process through which acquisitions decisions are made concerning eBooks, this study explores the work university librarians engage in before and during acquisition. Librarians have choices in the ways they acquire eBooks for their constituents, including directly from publishers, through EPP, and through its competitors. The competitive landscape is changing and growing as eBooks become more widely acceptable to academic users. Though my partner knows who its competitors are and understands its value proposition and market position (e.g., price, quality, and speed to market), it is challenged by not knowing all the selection factors librarians consider when purchasing. Learning the criteria that go into purchase decisions is critical for improving marketing, and this is what this study explores.

The COVID-19 pandemic has brought acquisitions challenges and opportunities into sharper relief. When I began engagement with EPP in 2020, the future of universities—costs, budgets, locked-down campuses, virtual attendance, openings, and closings—was in a state of flux. As libraries shuttered and went virtual, many users carried on as before by logging into the library with their credentials and using digital resources remotely. Others had to switch from print to digital with their first research need. Librarians were available and uniquely situated to provide instruction on digital platforms and how to access required materials so teaching and learning could continue. Making resources such as eBooks available and discoverable by users is an everyday experience made possible by librarians. Suddenly and rapidly, demand increased. As a result, EPP became interested in these behind-the-scenes practices of its customer and how to better support them in their work.

III. Problem of Practice

My partner organization believes that its eBook platform has what faculty and student researchers want. Its usage metrics and sales results from the past 18 months of the pandemic supports this conviction. Now, EPP is interested in finding novel and effective ways to communicate its offering and influence users' choices as the competitive landscape becomes more crowded with providers. A new marketing leader at EPP recognized the need to know its customer better and enlisted my help to learn more about the subject librarians' role in the eBook purchase process and how these librarians work with their users. Though subject librarians are the correct target market for EPP and appropriate recipients of marketing efforts, EPP must now cultivate relationships with these stakeholders. From this research into the subject librarian role, my partner organization seeks ways to improve its relationship marketing strategies and explore ways EPP can enlist librarians to cocreate value.

Subject librarians serve as selectors of resources that address academic departments' research and teaching needs. They are responsible for creating and managing a balanced collection of library materials for these purposes. Often experts themselves in the subject field, subject librarians perform a liaison role between their constituents and the library, fielding requests and furnishing recommendations, while also teaching about the library's resources and promoting its assets. (Fortson, 2021).

At large institutions, library budgets are divided among the various colleges and academic departments for collections purposes. Among key roles for subject librarians are the management of how the budget is allocated for developing and maintaining collections; promoting and recommending library materials; teaching and learning activities; fielding requests from faculty and other users; reviewing learning materials; and ultimately deciding on and selecting materials for the collection. Balancing the needs of faculty and other stakeholders, the subject librarian reviews contractual terms, advocates for constituents' needs, and is involved in decisions relating to preservation, sustainability, and storage concerns.

In this study, I use qualitative methods to examine the librarian role for EPP. In the process, I show how new purchasing and acquisitions processes have significantly impacted the way eBooks are purchased and the future of subject librarianship.

Adding more complexity, roles and responsibilities at large university libraries have undergone changes as eBook usage has increased. In particular, on-demand plans based on user behaviors are now routinely deployed alongside traditional purchase plans well established at EPP. Understanding how libraries acquire eBooks now using multiple, concurrent processes will be instructive for my partner organization. Each process has a unique set of terms of use, content parameters, licenses for access, and permitted usage activities, such as downloading. Insight into

both subject librarians' processes and practices, as well as its stakeholder needs and values, is

vitally important to marketing to this customer. EPP marketing needs to know how it is evaluated

leading up to purchase in order to serve its customers better. Identifying underlying motives,

unmet needs, and key moments in the process where there are opportunities to align its service to

address gaps will strengthen its value proposition.

This study provides EPP marketing with a map of this new terrain from the perspective of

the subject librarian. As EPP marketing comes to know its subject librarian customer better, it

will gain strategies to become more effective in marketing. However, to be truly effective, these

marketing activities must be collaborative and focused on customer value. EPP's return on

investment for solving customer challenges is business retention, growth, and sustainability of its

mission.

IV. Literature Review

The review of the literature begins with the buy cycle—a marketing term used to describe

an organization's journey from identification of a need through a purchase decision.

Understanding the customer's buy cycle and its key stakeholders is valuable to marketing and

sales teams generally, and it is necessary for EPP's efforts to market to universities. Next, I

explore the literature on service experience marketing and service-dominant logic (S-D logic), a

marketing methodology useful in understanding how buyers and sellers cocreate value for a

service offering. Together, these perspectives provide an approach to "service" that incorporate

activities beyond the delivery of eBooks to users by considering the broader experience of

librarians. Some of these events pertain to the customer experience of the librarian as

intermediary, such as licensing terms, usage reports, and even availability schedules, while

others, such as access, discovery, and downloading speak directly to the user experience. Each of

these touchpoints is collectively part of the service offering—what EPP and the library exchange, the end-to-end platform experience for eBooks.

The stakeholder at the center of the eBook buy cycle and service experience phenomenon is the subject librarian. As the intermediary between the provider and the user, this role can take on the persona of buyer, decider, influencer, and even gatekeeper in the purchase process (Rossomme, 2003). To situate the subject librarian in the purchase process, my literature review explores the acquisitions processes in academic libraries for eBooks. As new acquisitions methods emerge and gain adoption, the role of the subject librarian as selector changes. How the subject librarian job role changes has impact—on users, on library collection development and management, and on marketing. Information on job responsibilities of the subject librarian are included in the research to gain understanding of the variety of interactions in the purchase process in the context of interactions between librarians and end users.

Service, Customer Relationship, and Experiential Marketing

Institutional purchases are complex, consultative, and typically the kind of decisions made with input from other stakeholders. Service providers (suppliers) and buyers (customers) are part of a wider ecosystem of stakeholders who influence each other and collectively comprise a broader decision-making unit. Influencers of the purchase bring not only preferences, but status, biases, needs for control, and perceptions of risk to the process (Rossomme, 2003). Stakeholder roles can differ for the same individual because they are determined by the step in the process, for instance prepurchase or purchase point (Rossomme, 2003).

In the university library setting, the subject librarian represents the diverse interests and requirements of users. These end-user desires are carried forward to providers as service essentials alongside, yet distinguished from, the fundamental needs of the subject librarian and

library colleagues. Here, the university may be thought of as an instance of an ecosystem of customers situated in a service experience. Customer-focused marketers view this end-to-end process and the relationships it contains as "holistic phenomena" that create service value (Lusch & Vargo, 2006; Helkkula & Kelleher, 2010).

Customer relationship marketing (CRM) is a strategic approach to improving value through the development of relationships with key customers, customer segments, and other stakeholders. It typically leverages technology, data, and customer touchpoints as inputs to understand customers and cocreate value with them (Payne & Frow, 2005). Focusing on how relationships extend, deepen, and develop over time, *experiential marketing* attends to methods that engage customers in personal ways along their journey together. Thinking of value, experiential marketers use events as opportunities to interact with and engage customers (Becker & Jaakkola, 2020).

Customer experience is the product of an interaction between a service provider and a customer over the span of their relationship. Examples of interactions include customer's discovery of, advocacy for, purchase, and use of a service. In *service marketing,* the customer's individual assessment, reaction, or response rising from a service interaction is an opportunity for marketing to convey and build value. Additionally, service marketing is considered to be any direct or indirect contact with a provider's service delivery system (Becker & Jaakkola, 2020). This is important to bear in mind when understanding that the value of a product or service is determined by the customer, and it pulls from every interaction. Effective providers of services communicate value back to their customers in ways that demonstrate they are listening to the customer. It is in this communication, or "exchange," that value is cocreated (Lusch and Vargo, 2016, 2018).

Indeed, according to service experience marketing research, contemporary service experiences are circular, rather than a one-way, linear path from provider to customer (Helkkula & Kelleher, 2010). Along the route from purchase to use, from new releases to repeat purchase, inputs from a variety of customer behaviors are conveyed back to the provider for additional and continual value cocreation. That is, customer feedback drives service product development. Without customer feedback, services are mere feature sets, not experiences replete with meaning. Without the experiential component, customer perceived value—the what's in it for me—is missing. Without experiential input, the provider overlooks the opportunity to offer a more purposefully built service to its customers (Helkkula & Kelleher, 2010). However, when providers take on their customers' service experiences as important product development data, they empower customers to cocreate value and make meaning out of lived service events (Lusch & Vargo, 2006).

The S-D logic marketing perspective offers the theory that value is a constructed process that is created reciprocally between provider and customer (Lusch & Vargo, 2016, 2019). Here, the relationship of buyer and seller is abstracted to positions of mutual value creation, and the purchase transaction itself is just one of many experiences. When viewed through the lens of service, every experience on the customer journey becomes an opportunity to relate, connect, and improve value. Learning about how a service works well in practice, where it fails, how it is challenging, and ways it might be better is not new. What is innovative is to think about these situative inputs as equally vital to product and service development as anything that happens outside of the customer experience. Where there are motivated customers eager to share their experiences, brands are able to operate at a much deeper level of engagement. These can be more

expedient, more insightful, and more rewarding for the brand and the customer (Lusch &Vargo, 2016, 2019).

Collaboration and Marketing Opportunities with Librarians

Moving from general marketing approaches to the work of librarians, it is helpful to think of the subject librarians as a resource for the learning materials in the library. In their function as reference librarians, subject librarians connect users to the tools available to them, facilitating use. They work alongside acquisitions librarians, who work on the business side of the purchase, and electronic resources librarians, who are involved post-purchase in the role of managing and maintaining electronic resources, including eBooks.

A recent study highlighted the power of collaboration in marketing digital resources to students (Lasher & Denzer, 2020). Working together, librarians offered not only the content knowledge of the subject or "collections" librarian, but technical information on the attributes and features of a variety of platforms. This marketing partnership enabled students to learn how to get what they need in the format necessary. In marketing eResources to students, brand knowledge aided access, utility, and facility in engaging in academic research. Librarians, in service of users, became brand ambassadors—a behavior that service providers would want to encourage and champion because it allows them to get closer to end users and increase platform usage (Gomes and Brandão, 2016).

Decision-Making in Library Purchasing Processes

Decision-makers are the targets for provider marketing. Understanding the stakeholders, their roles, and their purchase power in library eBook buying is the focus of this section.

Understanding the Intermediary as Decision-Makers and Buyers

While the importance of relationship marketing to intermediaries is critical, understanding the intermediary role of subject librarians is equally important. Through librarian

interviews, Chen, Makani, and Bliemel (2016) analyzed factors involved in decision-making for purchasing electronic resources for libraries. The authors developed a model for managing library resources to aid in purchase and renewal decision-making. Instructive for marketers, the model offered a window into library processes and workflows. Another model considered how networked systems of libraries consolidate to reduce costs as assets and holdings switch from print to digital (Dempsey, Malpas, & Lavoie, 2014). Libraries studied engaged in consortia to gain leverage for their stakeholders and other constituents' needs. This approach added another dimension to understanding the value librarians place on services and how they network in a wider ecosystem to connect content to users. The purchase processes of eBooks, known as acquisitions, are covered in the paragraphs that follow.

Library eBooks and Decision-Making Processes

Recently, Zhang (2020) discussed the decision-making processes that academic librarians use to purchase eBooks, providing critical insight into its complexity, as well as the difficulty in setting and adhering to scalable processes. Common steps in the decision-making processes (evaluation of the works and usage data, comparing purchasing and licensure plans, and supplier selection), as well as perspectives on the workflow process itself were reviewed. The author applied Nutt's framework for classifying and examining decision-making processes to analyze the data, finding that an appraisal model, with its reliance on evaluation, was most commonly used. In renewal decision-making, price and usage emerged as the most common factors for selection (Zhang, 2020; Kalikman-Lippincott, et al., 2012).

Library eBook Acquisitions Plans

Many studies on academic library operations discussed acquisitions processes and plans available for eBooks, but rarely differentiated the roles and responsibilities of different types of

librarians that work in collaboration behind the scenes of what are frequently referred to as "Big Deal" arrangements with publishers and aggregators (Shapiro, 2016). The Big Deal mode of eBook acquisition extends a phrase coined for the huge, bundled, digital journals that changed academic library holdings from print to digital in the 1990s. Platform service providers for eBooks mimicked strategies employed in the offering of journals electronically—a wide range of publishers' materials bundled at a lower cost than individual publishers can offer independently. However, for research purposes, books are not necessarily used in the same way journals are. For instance, a student may be seeking only an introductory chapter, not a complete monograph, which means the search (at the chapter title) and format (individual chapters) must adapt to match user requirements. As a result, user behavior impacted the service offering.

Explaining the need for providers to match user needs to purchase plans, one of the first studies on eBook purchasing focused on how providers worked with librarians to cocreate nuanced purchasing models. These models were based on immediate demand scenarios, applying a more responsive "just-in-time" model over the "Big Deal," "just-in-case" standard commonly used for journals (Kalikman-Lippincott, et al., 2012). In her research, Roll (2015) aptly compared an emergent, user-driven, demand-based eBook plan to the Japanese efficiency model for demand-driven production processes: "just-in-time." Kalikman-Lippincott, et al. (2012) examined library stakeholders' unmet needs as well. These included a desire for greater flexibility in programs, better support for sharing of resources, and more transparency regarding the availability of electronic resources. However, wide-ranging, all-encompassing collection plans proved unwieldy and were not found to be attractively priced (Kalikman-Lippincott, et al., 2012). The perceived value proposition of such deals is that they make more learning materials available for more users, which is usually a positive. The downside is that they tend to absorb

most of library collections' budgets, and perhaps fill libraries' digital collections with low-usage assets, such as lesser book chapters. Plans that permit purchase at the chapter level without the necessary purchase of a complete book proved to be better material for collections (Kalikman-Lippincott, et al., 2012).

On-Demand Access Plans

First known as *patron-driven acquisitions (PDA)*, a new way of acquiring now known as *demand-driven acquisitions (DDA)* emerged in the early 2010s, and grew to become a preferred means for acquisition since (Zhang, et al., 2015; Roll, 2015; Schroeder & Boughan, 2017). DDA plans typically afford opportunities for libraries to work with eBook providers to collaborate on a broad collection of titles from the range of publishers they represent, to be discovered by users at a library that licenses the plan. The library pays as users access the title, according to the terms set forth by the library with the provider. The library does not pay for titles in the pool that are not used, and the payment is retroactive—occurring after use. Here, the library controls the collection pool offered, but not the purchase behavior. The user actually makes the acquisition (purchase) through the action of accessing the eBook.

In assessing how libraries shifted from traditional approval plan purchases (e.g., when a provider automates purchases based on a library's predetermined profile and autoships the eBooks that fit the model) to a DDA model, studies noted that the DDA plans yielded more content for a lower price than traditional provider packages (Lewis & Kennedy, 2019; Roll, 2015). Lewis and Kennedy (2019) further explained that implementing a DDA plan subverts the traditional acquisition process because it "removes the librarian from the selection process of a library's eBook collection and gives the patron control through discovery and use of a title" (p. 162). As the function of selecting becomes disintermediated from subject librarians by DDA

plans, a greater need for data analysis—what Johnson (2018) refers to as "higher-level statistical

collection analysis" (p. 93—materializes.

In 2012, *evidence-based selection (EBS)* practices emerged as another way to handle on-

demand acquisitions. More commonly referred to as *evidence-based acquisition (EBA)*, this

model "reverses the steps" as "use precedes selection" (Strothmann & Rupp-Serrano, 2020).

Similar to DDA, librarians work with aggregators and/or publishers to create a collection from

which users access eBooks. Additionally, they pay for the service up front, and set a specific

timeframe for the service. At the end of the timeframe, librarians are able to analyze what users'

accessed and determine whether to buy the titles. The usage becomes the evidence, or rationale

for purchase, as opposed to the subject librarian's sole selection. Usage is vetted by the librarian.

Some titles may be deemed outliers and not ultimately selected for purchase for the collection.

Providers offer these evidence-based models to libraries to offset the risk of over-purchasing.

From the traditional approval plan model, the mitigated risk is selecting titles users do not want.

From the popular DDA model, the mitigated risk is purchasing too many outlier titles that add

exponential expense if not monitored. By comparing usage reports derived from providers' EBA

models, approval plans, and title-by-title purchases over seven years, Strothmann and Rupp-

Serrano (2020) explored how closely subject librarians' selections matched to those of actual

users—essentially seeking evidence of efficacy for the EBA model.

An advantage to EBA is it offers a larger collection at a lower price than traditional

acquisition plans from which users browse and discover. This is similar to the DDA plan. Unlike

the DDA plan, the librarian has the "say" on purchase, which permits greater control over the

selection than DDA. Another advantage of EBA over DDA is the cost is contained and

predictable, so there is greater oversight of the budget. While DDA budgets are also set, EBA

provides for a tighter concentration of what the library is getting for that budget. The authors,

both professors of library science, recommended that providers offer greater flexibility during

the EBA to course-correct should the early usage data demonstrate low access. This

recommendation supported a more generous set of options for libraries, while also working

toward better collection building and greater service-minded partnership between provider and

librarian (Strothmann & Rupp-Serrano, 2020).

Collection Allocations in Context of On-Demand Plans

A common theme in the most recent literature on eBooks was cost and impact on library

budgets (Carrico, Cataldo, & Botero, 2015; Zhang, et al., 2015; Schroeder & Boughan, 2017). In

their study on cost and usage data, Carrico, Cataldo, and Botero (2015) recommended

benchmarking plans to prepare for and allocate budgets. The authors looked at access,

acquisition costs, average purchase cost, and average cost-per-use across on-demand plans over

time, from plan implementation to publication. The DDA plan (then called PDA) was perceived

as successful by University of Florida in terms of cost/benefit analysis.

As EBA emerged, Carrico, Cataldo, and Botero (2015) anticipated using DDA and EBA

in parallel to manage library collections. Similarly, Schroeder and Boughan (2017) favor a

hybrid approach—one that blends a variety of models and plans to capitalize on breadth of

content while maximizing budget. The authors added return-on-investment (ROI) to their

evaluation of approval plans, subscription packages, and DDA plans from 2009 to 2016 at

Brigham Young University (BYU). The authors' method differentiated outright purchases from

short-term-loans (STLs), which are a way of bridging the access for a DDA title that is not

purchased on its first usage **trigger** . STLs enable the title to remain in the

discovery pool unpurchased until the trigger is reached, often three uses. The research indicated

that ROI is better assured than simple purchasing on a first use (Schroeder & Boughan, 2017).

Cost-per-use analysis in the BYU study revealed a clear motivator for on-demand plans

(Schroeder & Boughan, 2017). For example, cost-per-use of a purchased-on-approval eBook is

$93.08 per use versus a DDA use at $6.52 and an EBA at $2.59. Here, these dual on-demand

plans reduced costly approval plan usage by more than 50%. Of note, a purchased-on-approval

print book is $48.60 per use, nearly half the price of the digital version. eBooks being more

expensive than print may seem counterintuitive (Schroeder & Boughan, 2017). The large,

complex licensing deals providers make with publishers and the overhead of the enterprise

involved in the providers' collection operations are cost drivers for the platform service. Recent

studies noted that eBooks tend to have very high use in their first year of availability then drop

off dramatically, creating a "long tail" usage pattern (Ahmad, Brogan & Johnstone, 2014; Tracy,

2019). Tracy's (2019) analysis uncovered differences by discipline as well as genre, which

supported high interest in eBooks monographs, particularly in the humanities. This countered the

perception that because humanities scholars tend to read more monographs (increased screen-

reading time, which can be exhausting), read them deeply (not just for reference or fact-

checking), and engage in observations about the tactile book (such as endpapers), they would

prefer print over digital. Tracy's study (2019) demonstrated the utility of usage reports beyond

records of costs.

> **What "Triggers" an eBook "Use?"**
> How does an institution know that a user is actually interested in accessing,
> and/or actually using an eBook? What prevents a mistaken click or wrong
> turn from becoming counted as a legitimate and intended "access" by a
> library user? A trigger is the threshold set by an aggregator that a user at an
> institution has intentionally accessed an eBook. At the heart of the trigger

definition, which varies from aggregator to aggregator, is a series of
behaviors, or item requests that mimic interest in a print title. These could be
picking up (like clicking), browsing through the pages (staying on a digital
page or pages for a certain amount of seconds), reviewing the Table of
Contents (staying on the digital Table of Contents page or pages for a
certain amount of seconds), checking the book out (downloading or printing).
Project Counter (www.projectcounter.org) is a not-for-profit organization that
maintains a "Code of Practice," which has established standards for counting
access and usage of digital content, such as eBooks and eJournals.
Currently, COUNTER5 is the version used to record data credibly and
objectively on usage to be shared with both aggregators and libraries. For
EPP, the item count is set at seven, and any incidental usage below the
trigger threshold is considered free access (JISC, www.jisc.ac.uk, 2021).

While EBA plans emerged as a proven way to manage costs, Carrico, Cataldo, and
Botero (2015) anticipated libraries using DDA and EBA in parallel as a collection strategy. Since
2015, on-demand plans have been further refined, and Strothmann and Rupp-Serrano (2020)
investigated a concern of the subject librarian—DDA and collection management. In DDA, the
collection development purchasing is outsourced to the user. Therefore, if the resulting library
collection is not monitored, it can grow unwieldy, expensive, and misaligned to the collection
goals of the discipline. In another recent comparison, this time across several institutions
spanning the several years, Downey and Zhang (2020) provided a case study for DDA use and
collection efficacy. The authors focused on ROI, budget, and usage from the acquisitions
librarian perspective. Though useful for cost management, it did not consider the subject
librarian role in its research.

eBook Format

Moving from processes to acquire eBooks to the eBook format is a necessary step toward
the understanding of user experience, something Tracy (2018) considered from the perspective
of user needs and the role of the librarian in the user experience. Several studies on the user

experience of eBooks (Rafiq & Warraich, 2016; Kumbhar, 2018; Tracy, 2018) noted format as a decision criterion for selection of electronic over print format. Practical advice for librarians included selecting formats for easy downloading of chapters and favoring plans that provide DRM-free, PDF formats, which allow for better, sustained consumption with greater fidelity to the originals (e.g., same page numbers). Noting how platforms and digital formats vary, particularly when consumed on different devices, a group of studies encouraged librarians to advocate for better user interface and improved accessibility to avoid abandonment of the material and mitigate hesitancy of faculty adoption and student use (Rafiq & Warrich, 2016; Kumbhar, 2018; Tracy 2018).

Among other job responsibilities, the subject librarian is the advocate for the user stakeholders in the university departments or disciplines to which they are assigned. Understanding what is necessary for the end user to be successful in utilizing eBook resources is imperative. It is vital for subject librarians to convey user needs in eBook purchase decision-making. As the subject of this improvement study, the role of the subject librarian is a critical component of this review of the literature.

The Subject Librarian

The literature on the subject librarian role explained what is known about the development of this facet of librarianship and demonstrated its evolution over the past 25 years. "Subject" refers to the discipline(s) in the collection of learning materials that a librarian oversees (Feetham, 2006; Johnson, 2018). Also known as "subject selector," this type of librarian selects and allocates budget to build the department's collection (Johnson, 2018). Main job functions are collection building (adding to the library), and collection management (ensuring permanent access to necessary resources in a cost-effective and sustainable manner) (Johnson, 2018). When situated within the university library, the buyer role is divided:

acquisitions librarians perform the technical tasks and subject librarians engage in the academic part of the process (Johnson, 2018). However, as technology transformed library services, subject librarians expanded their skills to attend to judicious choices for budget allocation while understanding complex licensing entitlements and provider platform behaviors (Johnson, 2018).

Considering the wider ecosystem of the university, subject librarians' have other responsibilities, such as serving the community of users (Johnson, 2018). Importantly, faculty request materials for inclusion in the collection via the subject librarian. The subject librarian is also the faculty resource for assisting students in using library resources for reference purposes and, increasingly, for teaching and learning support (Johnson, 2018; Johnson 2019). Understanding the needs of constituents informs collection building and collection management, and, when coupled with teaching and learning responsibilities, the subject librarian becomes "embedded," accountable for cocreating responsible, information-literate members of the academic community (Johnson, 2019). Historically, the "reference, liaison, and subject librarians performed the role of connecting people to the information they needed in a visible way" (Johnson, 2019, p. 91). Contemporary subject librarianship has been described as "blended," which emphasizes the information technology skill to work with digital learning materials, alongside instructional skills to aid in teaching activities, and "embedded" denoting research support for scholar-users (Corrall, 2015).

Learning about the subject librarian through the literature has provided a strong foundation to examining this role in library acquisitions. Using the buy cycle and customer-centric marketing approaches to better understand the relationship between eBook providers and the university librarian buyer ecosystem offered a way to contextualize the purchase process. Researching the acquisitions processes provided an appreciation of the complex environment in

which subject librarians perform their jobs. All of this information is useful to better serve the

subject librarian customer.

V. Conceptual Framework

Today's customers are faced with multiple choices and sometimes overwhelming

options. Organizations that provide services must focus on winning customers' loyalty

repeatedly, throughout the life cycle of their relationship. To truly succeed in an interconnected,

experience economy, providers must not just create, but cocreate value with their customers to

deliver a consistent, elevated experience across all touchpoints (Helkkula, Kowalkowski, &

Tronvoll, 2018). This requires embracing customer experiences to drive service innovation in

such a way that the service reflects the customers, their challenges, and their use cases (Becker &

Jaakkola). Understanding how customers experience satisfaction at specific inflection points in

their purchase journey holds a key to improved marketing.

Rossomme's (2003) Customer Satisfaction Measurement (CSM) model is a framework

that highlights crucial activities in large-scale, intermediated purchase scenarios, such as

institutional acquisitions occurring at university libraries. Here, "satisfaction" is the focal

outcome variable in the buy cycle. Participants engage in activities that show how and at which

points their service satisfaction formulates. To what degree they are satisfied with their service is

an important determination for marketers. Responses may vary based on the stakeholder and on

the decision point. Here, prepurchase, purchase, and postpurchase usage are identified as the

focal points of interest—illustrating the moments when influence happens, and by whom.

Figure 1: Rossomme's Customer Satisfaction Measurement Buy Cycle (2003)
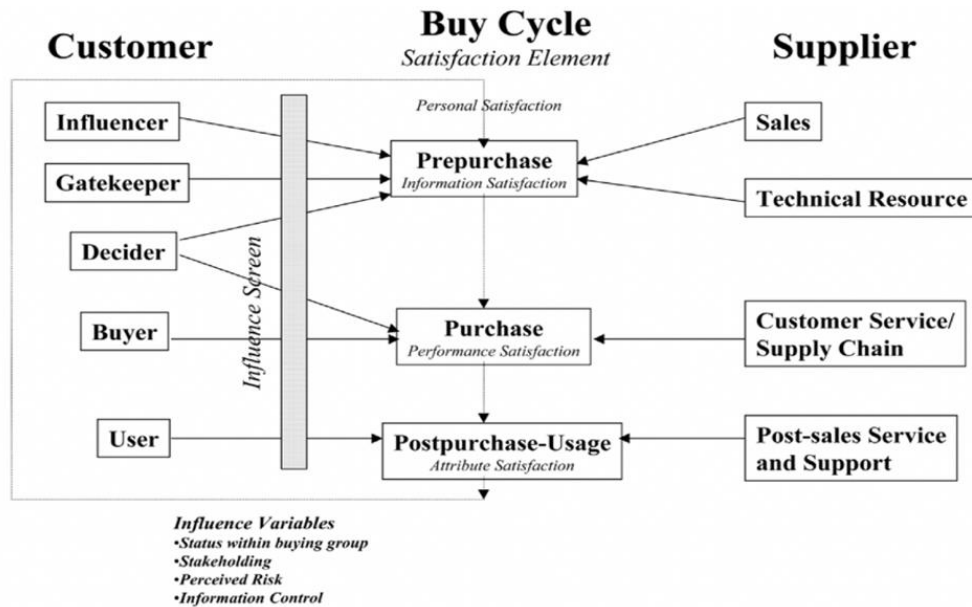
Stakeholders may take on different roles at different points in the buy cycle. For marketers, it is important to know the entire span of an organization's journey from identification of a user need through a complex purchase decision so they can find opportunities to improve their value to customers. Marketers refer to this as a *buyer ecosystem*. Read as a map of the purchase process with key stakeholders' interests positioned linearly, this framework captures evaluation decisions, influence, and motivations at each juncture, for each stakeholder. When a single person represents multiple interests or engages in multiple actions, more information becomes available. This systemwide insight may surface increased opportunities for providers to connect to stakeholders and deepen relationships.

The CSM model connects to the literature on service, relationship, and experiential marketing. It provides a useful organizational frame for situating the subject librarian in the buy cycle purchase process. In identifying stakeholders and their influence variables (status, perspective, perceptions of risk, and information control) greater insight may be shared (Rossomme, 2003). The exchange of information in the process permits value to be not just

determined by stakeholders, but cocreated when communicated back to the provider (Lusch &

Vargo, 2019). This enables the provider-customer relationship to expand from dyadic to

systematic as the entire customer experience emerges for evaluation (Becker & Jaakkola, 2020).

        This framework is appropriate for my study of librarians in the purchase process because

it allows for identification and differentiation of the stakeholders involved in organizational

buying behavior. These are the recipients of relationship and service marketing, both directly

(librarians) and indirectly (users). Stakeholders include those who act as influencers, deciders,

and gatekeepers as they work together on prepurchase activities, such as budget allocation,

managing constituents, supporting users, and doing administrative business at the library. The

decider is a key stakeholder in the purchase, along with the buyer. Users are commonly thought

of as the end users of the service. Uncovering which roles the subject librarian plays at critical

moments in the buyer ecosystem is an important purpose of my investigation. EPP also wants to

reach end users more effectively, yet within the norms of the institutional purchase process.

Through its investment in deepening its service relationship with subject librarians, the value of

EPP's eBook experience is passed on to the users in the ecosystem through the intermediary. As

intermediary, the subject librarian is expected to carry a high degree of influence in the

prepurchase and purchase processes as "decider" and "buyer." According to the literature, these

are subject librarian functions, and they may also align to a gatekeeper role.

        Using this framework (Rossomme, 2003) to get clarity on subject librarian stakeholder

responsibilities will be informative and instructional for EPP. Inquiry on purchase process

activity points and the roles they identify is a means to learn about their satisfaction. Satisfaction

is an evaluative concept. The literature shows that subject librarians are known to be evaluators

of eBook choices, so the factors they consider should unfold through their process narratives as

prompted by questions from the buy cycle framework (Rossomme, 2003). The literature review has surfaced several, concurrent eBook purchasing processes in use in the university library, indicating that the buyer ecosystem is complex. Learning about how subject librarians derive satisfaction and determine value will lead to a better, more targeted marketing program for EPP.

From the literature and to support the buy cycle framework, axioms from the S-D logic framework (Lusch & Vargo, 2019) add dimensionality to the library purchase journey:

Axiom 1: Service is the fundamental basis of exchange.

Axiom 2: Value is cocreated by multiple actors, always including the beneficiary.

Axiom 3: All social and economic actors are resource integrators.

Axiom 4: Value is always uniquely and phenomenologically determined by the beneficiary.

Axiom 5: Value cocreation is coordinated through actor-generated institutions and institutional arrangements.

Building on the concepts of service, relationship, and experiential marketing—which agree that service is a personal, engaged interaction—S-D logic views the customer experience as a "holistic phenomenon," containing subjective, socially constructed, event-specific interpretations (Lusch & Vargo, 2006; Helkkula & Kelleher, 2010; Becker & Jaakkola, 2020).

Learning what subject librarians value in selecting eBooks provides powerful information in context. By probing this buyer, the personal needs and evaluative attributes of the subject librarian and the user are expressed. Delivering expressions of value from the customer with regard to decision-making factors is purposeful.

The following tables define the roles in the buy cycle in the eBook purchasing ecosystem and key terms from relationship, experience, and service marketing.

Table 1: Role Definitions for Buy Cycle in R1 University eBook Purchase Processes

ROLE	DEFINITION
Buyer	For the purposes of this project, *buyer* is defined as one who performs the act of purchase and/or one who assesses a service for purchase with the intent to buy eBooks.
Decider	For the purposes of this project, *decider* is defined as one who actually makes a choice or decision in the eBook purchase process.
Influencer	For the purposes of this project, *influencer* is defined as one who holds knowledge, authority, or insight to persuade another's decision about library eBook purchases.
Gatekeeper	For the purposes of this project, *gatekeeper* is defined as one who must be passed through in order to gain access to something, such as library eBooks.
User	For the purposes of this project, *user* is defined as one who needs, accesses, discovers, or searches for library eBooks.

Table 2: Key Concepts and Definitions

CONCEPT	DEFINITION
eBook Platform	For the purposes of this project, an *eBook platform* is defined as a large database of digital books made available by an institution, such as a university library, for authorized users to search, discover, and access academic scholarship for the purpose of research, reading, downloading, and printing within a specified terms of use or license.
Buyer Ecosystem	A metaphorical lifeworld encompassing all the direct and indirect customer touchpoints and opportunities for buyers and sellers to influence one another and cocreate value (Helkkula, Kowalkowski, & Tronvoll, (2018).

Customer Relationship Marketing (CRM)	A strategic approach to improving value through the development of relationships with key customers, customer segments, and other stakeholders; leveraging technology, data, and other inputs to understand customers and cocreate value with them (Payne & Frow, 2005).
Customer Satisfaction Measurement	A tool by which marketers assess the health of their relationships with their customers (Rossomme, 2003).
Experiential Marketing	The product of an interaction between an organization and a customer in a personal way over the duration of their relationship (Becker & Jaakkola, 2020).
Service-Dominant Logic (S-D Logic)	A marketing perspective that holds value to be a constructed process that is created reciprocally between provider and customer in a "service-for-service exchange" (Lusch & Vargo, 2016, 2019).
Services Marketing	An individual assessment, reaction, or response arising from a customer interaction with a service; any indirect or direct contact with any aspect of a provider's service delivery system (Becker & Jaakkola, 2020).
User Experience	An individual's perceptions and responses resulting from the use of a product, service, or system (Mirnig, Wurhofer, Meneweger, & Tscheligi, 2015).

VI. Research Questions

The three questions guiding this study evolved from the literature and the conceptual

framework as indicated in this section.

Research Question 1: How does the subject librarian participate in the selection and the purchase of eBooks at very large research institutions?

This question was drafted to investigate the roles in the eBook purchase process to learn about

the start-to-finish workflow from the perspective of the subject librarian stakeholder: It was

formulated from Rossomme's CSM buy cycle (2003) and S-D logic theory's (Laush & Varga, 2019) notion of the buyer ecosystem having relevance to customers' interpretation of value. The CRM approach underpins the question because improving value occurs through the development of relationships with key customers.

Research Question 2: What factors do subject librarians consider in selecting eBooks for their collections?

This question also draws from Rossomme's buy cycle—specifically pertaining to satisfaction judgments: Here, customers are expected to "incorporate concrete, rational objectives directly related to the execution of a particular business function in their satisfaction judgments" (Rossomme, 2003). Aspects from the literature of service marketing informs the question as well because service assessments form from customer interactions (Becker & Jaakkola, 2020).

Research Question 3: How do on-demand acquisitions processes impact the role of the subject librarian at very large research institutions?

The final question factors in the satisfaction and systemic perspectives on the buy cycle: The literature informs us that the subject librarian's role is changed by on-demand plans. Experiential marketing holds that interactions with the service are also personal (Becker & Jaakkola, 2020.

As the buyer ecosystem changes, opportunities are presented for value cocreation. With this exploration into the subject librarian role in the institutional eBook buy cycle, my aim is to reveal new ways that EPP may partner with the subject librarian to increase the value of its service.

VII. Design

The purpose of this exploratory project is to investigate the routine experiences of subject librarians as they participate in the buyer ecosystem to uncover the ways in which eBook purchases are influenced at R1 university libraries. The buy cycle conceptual framework model (Rossomme, 2003) has been used to identify key influencers in intermediated purchase and how they inform such purchase decisions. The S-D logic framework offers a lens into how value is cocreated and exchanged among actors in a service network, such as an institution. The literature on eBook acquisitions and subject librarian job roles provided insight into ways eBook purchases are conducted at university libraries. Putting together the buy cycle model with applicable marketing approaches provided a useful setting to ground my study. The literature presented me with a frame of reference for approaching the subject librarian role in their ecosystem: the eBook purchase process.

Data Collection

My data collection was sequential. First, to test how this framework applied to the academic library purchase process, I conducted four pilot interviews to begin to formulate my data collection and to position my study. Second, I reviewed job descriptions from a variety of R1 university job postings and university library websites and created a table of key roles and responsibilities in purchasing processes. Third, I created a survey, which enabled the collection of quantitative data, but was used primarily as a recruitment tool for subject librarian interviews. Finally, and most substantively, I interviewed subject librarians to generate comprehensive and reliable answers to my research questions. In the following sections, I detail my data collection methods by source.

The results of this project are intended for EPP marketing as a base of knowledge for future study into the persona of the subject librarian. Gaining intelligence on the purchase process, recognizing the factors that inform eBook purchases, and exposing the sphere of

influence subject librarians have on eBook purchases, is for the purpose of improving EPP's marketing efforts. The resulting work is not intended to be a definitive recommendation or prescriptive model for library purchase processes.

Recruitment

I began my recruitment process with EPP in February 2021. With the pandemic still impacting convening events, the original idea to engage in focus groups at regional library conferences became a non-viable option. Instead, I recruited for one-on-one, virtual interviews with subject librarians in EPP's network. EPP recommended connecting to a cohort of subject librarians it had interviewed in 2018 for a marketing project. Of that list of participants, only two librarians were able to participate. To broaden the recruitment, EPP's sales team provided me with a select group of librarians from R1 universities from the United States and Canada. That group yielded an acquisitions librarian, but no subject librarians. In May 2021, EPP agreed to email my recruitment survey (Appendix A) to its R1 librarian database to interest more subject librarians in the project. The survey ran May 19–31, 2021.

While engaging in recruiting directly with EPP's network, I simultaneously engaged my participants in snowball sampling. Snowball sampling is a helpful strategy when it is difficult to find participants for a study, such as during a pandemic. The EPP-recommended librarians and my pilot librarians completed my survey and help me find more subject librarians by sharing the survey among their networks. In addition, I posted my survey to a listserv on eBooks at the American Library Association (ALA). Using all these tactics, I received 42 complete surveys. Only one of the survey respondents submitted to the interview.

Quantitative Data Gathering

I used the feedback in the surveys for quantitative analysis. This foundational information furnished critical insight on job functions in the purchase process as well as other important job

responsibilities and factors that determine eBook decisions in today's context. My goal for this

survey data was threefold: recruit participants, confirm that the conceptual framework resonates,

and focus my inquiry and scope for fruitful interviews. Table 3 illustrates the questions asked in

the survey as they align to my research questions.

Table 3: Librarian Survey 1

RQ1: How does the subject librarian participate in the selection and the purchase of eBooks at very large research institutions?	1. What type of librarian best describes your role? *Select all that apply.*
	   a. University Librarian
	   b. Head Librarian
	   c. Special Librarian
	   d. Acquisitions Librarian
	   e. Electronic or eResources Librarian
	   f. Subject Librarian
	   g. Other _____

	2. Which role(s) do you perform in the buy cycle for purchasing digital / eResources such as eBooks for your institution. *Select all that apply.*
	   a. Purchaser
	   b. Decider
	   c. Recommender
	   d. Influencer
	   e. Gatekeeper
	   f. User

	3. At your university, which librarians or other stakeholders do you work with on purchases eBooks? *Select all that apply.*
	   a. University Librarian
	   b. Head Librarian
	   c. Special Librarian
	   d. Acquisitions Librarian
	   e. eResources Librarian
	   f. Subject Librarian
	   g. Finance
	   h. Other _____

	4. At your university, is there a formal process and/or committee for purchasing eBooks?
	   a. Yes, there is a formal process
	   b. No, there is not a formal process
	
	a. If yes to above, (there is a formal process), is there a committee?
	
	   a. Yes, there is a committee
	   b. No, there is not a committee
	
	b. If yes to above, (there is a committee), are you on the committee?
	
	   a. Yes
	   b. No

RQ2: What factors do subject librarians consider in selecting eBooks for their collections?	5. Please rank the following in order of most to least important for an eBook purchase.
	   a. Price
	   b. Speed of order processing
	   c. Vendor
	   d. Content, overall
	   e. Breadth of content (general, core)
	   f. Depth of content (focused)
	   g. Customer service
	   h. Ease of use
	   i. High usage data
	   j. User request for resource
	   k. Positive reviews of resource

RQ3:How do on-demand acquisitions processes impact the role of the subject librarian at very large research institutions?	6. From the following options, please select your top 3 responsibilities.
	   a. Field collection recommendations
	   b. Manage budget allocation
	   c. Manage collection
	   d. Manage digital / eResources purchase and renewal process
	   e. Manage staff
	   f. Recommendation of digital / eResources for purchase
	   g. Selection of digital / eResources
	   h. Terms of use for resources
	   i. Train constituents on library resources
	   j. Troubleshooting digital / eResources
	   k. Other _____

Other: Demographic questions were asked to confirm Carnegie Designation as Doctoral University with Very High Research Activity, age, race, gender, years in profession, and years in current position.	

Qualitative Data Gathering Instruments

I conducted in-depth interviews with a purposeful sample of 11 subject librarians found via the recruiting methods discussed previously. My sample population had similarities (subject librarians from very large research universities) and differences (public and private institutions), and selected from a variety of disciplines. See Table 6 for detailed demographic information collected.

To obtain insight valuable to EPP marketing, I developed semi-structured questions to confirm job roles in the purchasing process and to learn how subject librarians determine value.

These interview questions are detailed in the following chart, aligned to my research questions and designed to draw out the factors that influence eBook purchasing.

Table 4: Subject Librarian Interview Questions

RQ1: How does the subject librarian participate in the selection and the purchase of eBooks at very large research institutions? Theme 1: Purchase Process Complexity • Role & Responsibilities • Challenges with concurrent plans • Challenges with on-demand plans • Collaboration and relationships	Describe your role and main responsibilities as a subject specialist. Describe the eBook purchase process at your library. How do you interact with eBook vendors? Are you on the committee for eBook selection? There are some terms used in a buy cycle: Selector, buyer, purchaser, influencer, gatekeeper—which do you identify with? Why or why not? What does the term "gatekeeper" mean to you in this context? How do you interact with acquisitions librarians on eBook purchases? How do you interact with eResources librarians with regard to eBooks? How efficient would you characterize the eBook purchase process as? What else should I know about the eBook purchase process?
RQ2: What factors do subject librarians consider in selecting eBooks for their collections? Theme 2a: Librarian value derived from service (as Decider) Theme 2b: User Experience, Needs, and Preferences (as faculty liaison and reference support) • Budget • Formats	If you interact or have influence in which vendors are used, what factors are considered when selecting a vendor to fulfill eBook orders? How are requests for data and reporting handled? Is any provider doing this better than others? Are there challenges in getting information, data, reporting from your vendors? Describe. Do you have preferred vendors? Why? How important is DRM-free for you and your constituents? Why? How do user terms influence selection?

• Access • Discoverability • Quality • Service value • Return on investment • Reporting needs	Do you prefer certain purchase plans when making your selections? Are you interested in curated collections when making your selections? Can you think of ways that vendors might help you be more productive in selection? What else would you like to share about eBook providers? What improvements would you like to see in products or services that I could take back to my partner organization?
RQ3: How do on-demand acquisitions processes impact the role of the subject librarian at very large research institutions? Theme 4: Multifaceted and Evolving Job Role • Stewardship / Collection Management • Forming diverse and inclusive collections • Teaching & Learning • Pandemic impact / ePreferred status • Sustainability	Describe your collection development and management philosophy with regard to eBook purchase plans. Elaborate on the time spent on collection development versus other responsibilities. How much time do you spend on activities related to faculty? What are your faculty relationships like? What other activities are involved in your collection-building? How much time do you spend on allocation and budget-related activity? Please elaborate on on-demand purchase models, such as DDA and EBA? Are you involved in DDA plans and processes? How? Are you involved in EBA plans and processes? How? How has the pandemic impacted eBook selection? Describe your work on storage, space, and print vs. digital collection management. What activities do you enjoy the most at your job? What areas would you like to devote more time to / less time to? If you could wave a magic wand and change something about the process, what would that be?

In June and July of 2021, I interviewed 14 librarians in 13 sessions lasting between 29 and 61 minutes. Each librarian worked at large research institutions—one private, three public. With the exception of one session in which I interviewed two librarians together, all were one-on-one interviews that took place over Zoom. The dual interview was the longest interview at 61 minutes. Each participant gave verbal consent before the start of the interview. Involvement in this improvement project is considered to be low-risk, so these consent protocols were sufficient for participation in the interview process. For fidelity, I asked and received permission to video record our sessions on Zoom and also deployed a back-up audio recorded (voice-to-text) via Otter.ai. Once I started receiving similar responses and no divergent or new information, I understood that I had reached saturation, signaling that I was ready to begin analysis of the data.

Though I centered on the subject librarian, I also interviewed an acquisitions librarian, an eResources librarian, and a special librarian to gain insight into the adjacent roles. The content provided was not considered as data for analysis, but helped with my understanding of processes and workflows. These librarians worked for three additional R1 universities, and in relating their workflows and processes, I noted similarities to those from my participants, which served to informally validate that my data reflected common workplace practices. Additionally, this insight helped me avoid biases that could form from speaking exclusively with subject librarians on their perspectives.

Toward the end of the interviews, there were some puzzling findings about Data Driven Acquisitions (DDA) plans that seemed inconsistent with some of the earlier data received in the interviews. With this concept in mind, I reviewed the literature again for insight and found confirmation on process. Specifically, it was on the purchase trigger. To get a clearer perspective from the participants, I sent out a very brief survey to all of my interviewees on how DDA plans

change the buying pattern and impact workflows. Also, I wanted to know how they felt about

that as a self-described "selector" or decider in the process. I added this data to my research.

Table 5: Interview Participants Two-Minute Follow-On Survey

RQ1: How does the subject librarian participate in the selection and the purchase of eBooks at very large research institutions?	1. The data indicates DDA (demand-driven acquisitions) as an emergent disruptor in the acquisition process. Which of the following best conveys the impact of DDA at your institution? a. DDA has had a significant positive impact on how my institution selects and purchases eBooks. b. DDA has had a significant negative impact on how my institution selects and purchases eBooks. c. DDA has not significantly impacted how my institution selects and purchases eBooks.
RQ2: What factors do subject librarians consider in selecting eBooks for their collections?	No questions
RQ3: How do on-demand acquisitions processes impact the role of the subject librarian at very large research institutions?	2. Which of the following express your perspective on DDA with regard to your job role? Select all that apply. a. DDA gives me more time to accomplish other responsibilities at my library. b. DDA has replaced a part of my job I enjoy. c. DDA has made me feel less relevant in the selection and purchase process. d. I should give DDA reports more time so I can better manage my collection. e. I feel that I've lost control of my collection because of DDA. f. Other [free response] 3. DDA has saved me time on the job. a. Yes. b. No. 4. Do you have a final thought on DDA for me? [free response]

For demographics on participants, the following table includes type of university where currently situated, discipline, gender, age range, and years in profession of librarianship. Participants varied and provided a diverse and representative sample.

Table 6: Participant Demographics by Institution Type, Discipline, Gender, Age, and Years in Librarianship

Participant n-11	Institution: Public or Private	Discipline	Gender	Age Range	Years in Librarianship
Participant 1	Public	International Relations & U.S. History	Male	Over 50	More than 20
Participant 2	Public	Political Science	Female	Over 50	More than 20
Participant 3	Public	Economics	Female	Over 50	More than 20
Participant 4	Public	Philosophy	Male	41–50	More than 20
Participant 5	Public	Public Policy & Political Science	Female	Over 50	More than 20
Participant 6	Public	Anthropology	Female	41–50	Between 10–20
Participant 7	Private	Business	Female	41–50	Less than 10
Participant 8	Private	Science	Female	25–40	Between 10–20
Participant 9	Private	Sociology	Female	Over 50	More than 20
Participant 10	Private	Education	Male	25–40	Between 10–20
Participant 11	Private	Humanities	Male	25–40	Between 10–20

Qualitative Coding Method

Using the transcripts from Zoom and Otter.ai, I reviewed the 10 interview transcripts for accuracy and sense, and made necessary edits to restore deficits and lapses in sense created by the imperfect audio transcription functionality. Then, I reviewed again for redundancy and any misattribution of speakers. Next, I removed myself from the transcripts, and inserted prompts. For instances when I used a key word that yielded an unclear rejoinder from the participant, I edited for sense. For instance, if I stated "faculty," and the participant stated "them" I would restore "faculty" in the transcript. In this way, I augmented the raw data of the transcripts for code occurrence analysis. A complete description of the codes and their definitions is found in Appendix C. Below are extractions of my Dedoose coding tables, displaying 32 codes, split into three sections: Purchase Process, Stakeholder Needs and Preferences, and Multifaceted and Evolving Job Role of Subject Librarian. The shading in the numeric displays represents low (light shading) to high (darker shading) number of occurrences. The darkest shade in the final row of each table denotes totals per code.

Figure 2: Visualization of Codes in Dedoose Software, Extracted to MS Excel

Theme 1: Purchase Process

	Roles and Responsibilities in Purchase Process				Purchasing Process								
	Purchaser	Decider	Gatekeeper	Influencer	Demand-driven Acquisitions (DDA)	Collaboration	Collection Development	Delays	Evidence-based Acquisitions (EBA)	License Options	Overlapping Purchase Plans	Overwhelmed	Relationships
Participant 10	2	1	0	0	1	2	4	1	0	1	2	0	0
Participant 9	1	0	1	0	2	0	2	0	1	5	2	0	0
Participant 8	2	2	0	0	0	4	5	2	1	5	5	3	8
Participant 7	5	8	4	1	4	9	3	0	1	4	4	0	0
Participant 6	3	2	0	0	5	0	4	1	3	0	2	2	0
Participant 5	0	1	2	0	5	3	6	1	3	1	5	0	3
Participant 3/4	0	2	3	1	2	1	1	1	1	2	3	0	0
Participant 2	0	2	0	0	2	2	2	1	2	1	5	0	1
Participant 11	0	1	0	0	4	0	5	2	0	2	0	2	0
Participant 1	0	3	0	1	6	0	1	1	2	1	1	1	1
Totals	13	22	10	3	31	21	33	10	14	22	29	8	13

Theme 2: Stakeholder Needs and Preferences

	Librarian Needs and Preferences						Librarian Value						User Experience			
	Budget-Related	Diverse	Platform Service	Provider	Reporting Instruments	Value	COVID-19	ePreferred	Faculty Relationships	Reference Duty	Stewardship	Teaching	Access	eBook Format (DRM-Free)	eBook Quality (Original format)	User Experience
Participant 10																
Participant 9	2	0	0	1	9	0	2	3	2	0	1	1	8	3	1	2
Participant 8	1	0	2	0	1	1	1	2	1	0	0	2	3	2	3	4
Participant 7	10	4	6	5	8	2	2	1	7	1	5	2	6	3	3	8
Participant 6	9	0	1	0	6	1	1	3	6	2	1	4	6	5	1	6
Participant 5	5	0	0	2	3	0	2	4	4	2	1	0	2	4	1	0
Participant 3/4	6	2	0	3	4	1	1	1	3	0	7	1	1	4	3	4
Participant 2	4	0	4	2	3	1	1	0	6	1	1	4	3	4	4	3
Participant 11	3	0	3	1	3	1	2	0	1	1	0	1	2	2	2	1
Participant 1	1	2	3	1	3	1	0	1	1	0	3	1	1	4	2	3
Totals	6	1	2	2	2	1	2	0	3	1	2	1	4	4	3	3
	47	9	21	17	42	9	14	15	34	8	21	17	36	35	23	34

	Theme 3: Multifaceted and Evolving Job Role of Subject Librarian		
	Area providers can help librarians	Challenges outside of purchase process	Changing job role
Participant 10			
Participant 9	1	0	0
Participant 8	2	0	0
Participant 7	8	2	3
Participant 6	1	1	3
Participant 5	0	0	0
Participant 3/4	2	1	1
Participant 2	1	2	2
Participant 11	2	0	0
Participant 1	1	1	1
Totals	1	2	3
	19	9	13

Thematic Analysis

Due to the exploratory nature of my study and the open-ended manner in which I questioned my participants on their workflows, preferences, and job functions, an inductive coding process was applicable to my analysis. This permitted the emergence of themes. As prework and to check for patterns, I used Otter.ai's "summary of key words" function after each session. I extracted these words into a Microsoft Excel spreadsheet for tracking. After the first few conversations, I noted that I was hearing about similar processes, and that participants were relating common behaviors and feelings. After the first two weeks, interviews yielded quite similar information on purchase process and decision-making factors for purchases, which indicated that my diverse sampling though small, was representative for this improvement study. In terms of the broader subject librarian role, each interview yielded unique perspectives, yet

common themes were being conveyed. For my research, the interviews with 11 subject librarians

totaled eight hours, eight minutes, and seven seconds of data. After the 10 interviews, I reviewed

these word lists and tabulated co-occurrences by hand. I reviewed them for relevance next, and

this revised list became my open codes, which I used via Dedoose to tabulate for occurrences in

my transcripts.

Then, I sorted the open codes seeking patterns. I made several versions of categorization

for what would become axial codes. Next, I adopted the method of creating a codebook to

organize participant responses into categories for thematic analysis of the interview transcripts

(Nowell, Norris, White, & Moules, 2017). The excerpt that follows is an example of a theme

"purchase process complexity," which was constructed from patterns, such as "feeling

overwhelmed," and "overlapping purchase plans." Those axial codes derived from analyzing the

common words and phrases within the group. I then created a corresponding definition, as well

as an example quote:

Figure 3: Excerpt from Codebook; Complete Codebook is found in Appendix C.

Purchasing Process Complexity		
Axial code; open codes	**Definition**	**Quote**
feeling overwhelmed; also data overload, overwhelming, guilt, guilty, data overload, information overload, challenging	pain point or challenge by vast amount of information available on eBooks; may lead to stress or guilt	"It gets really complex when you have all these DDA plans and all the data. I should review it more frequently, I guess."
overlapping purchase plans; approval plans, firm orders, orders, order system, purchase model, acquisitions plans; also duplication, duplicate, dedupe	problems that arise from complex and multiple plans for purchase at the same time; using multiple purchase plans, e.g., DDA, EBA, approval, title-by-title	"Timing can create unnecessary duplicate orders, which can be challenging to monitor and also could result in overspending for the same resource. That is stressful. "

This quantitative information provides a context for the prevalence of the 32 key term occurrences in the subject librarian interviews. Over the course of my 10 interviews, the topics of complexity in the purchase process emerged alongside information on roles and responsibilities. The most frequently occurring code had to do with budget, followed closely by reporting needs. As the discussion turned to stakeholders, faculty relationships were most discussed, and in terms of user needs, access, DRM-free format, and user experience were all highly accounted for in terms of topical frequency. Surprisingly, "influencer" as a role in the purchase process was the lowest frequency, at three. This could reflect the subject librarians not speaking of their own influence.

My themes are separated into four distinct categories. The choice to modify from three to four themes provided an opportunity to split "Stakeholder Needs and Preferences," into two distinctive viewpoints—that of the eBook end user (students and faculty) from the subject librarians, who are also users of the service for decisioning (purchasing tools, reports, advocators for end user' interests).

Theme 1: Purchase Process Complexity

The first theme centers on the purchase process roles and complexity. It includes challenges that arise from having several concurrent processes, the importance of relationships and collaboration, and how new on-demand plans impact stakeholders and roles throughout the buyer ecosystem.

Theme 2: Librarian Value Derived from Service Providers and User Experience Needs

Theme 2a: Librarian Value Derived from Service (as Decider)

Theme 2b: User Experience, Needs, and Preferences (as Supporter of Faculty and Students)

Next, the requisites of subject librarians from service providers are captured together. Included are ways that value may be better attained, such as reporting and analysis needs. Budget responsibilities, such as getting the best price for value and ensuring quality service so that eBooks are accessible and discoverable, are conveyed as well. I cluster the roles of "faculty liaison" and "reference support" here because it is through these responsibilities that the connection between librarian factors and user factors occurs. Because subject librarians serve users, they know what "good" looks like and advocate for attaining it consistently for their constituents.

Theme 3: Multifaceted and Evolving Job Role

The theme of the multifaceted role of the subject librarian includes essentials for job optimization. This is different than the needs and preferences concerning eBooks because it is more global in concept and considers the stewardship of the subject librarian in building and maintaining the library on behalf of scholars. Feedback on their desires to help students with their research needs and goals, as well as maintaining and sustaining a diverse and inclusive collection is revealed. Thoughts on the pandemic and ePreferred library stances are also brought to light.

Project Limitations

Engaging in this project during the COVID-19 pandemic presented challenges that translate to limitations. The timing of recruiting and data collection coincided with spring 2021 semester obligations among librarians, such as budget matters and heavy constituent-facing job needs. This delayed my interviews until summer 2021, and impacted my ability to recruit once some initially interested librarians departed campus for the summer break. A common factor from both participant and EPP was that the stress of the pandemic left little time for optional projects. Indeed, it proved difficult to get sustained attention from EPP during this project. EPP's

eBook Product Marketer, a key contributor, was unavailable during several months of the project due to an extended leave. The phenomenon of the "great resignation" of 2021 affected EPP, resulting in large turnover of staff, including two key stakeholders.

My own bias and that of the project itself may have influenced responses from my participants. First, with the study positioned as a quality improvement project, confirmation bias may have been a factor of influence on my interview tone, and ultimately on my findings and recommendations for EPP. Similarly, in providing the context for the project, in recruitment, my partner organization was known to participants, which may have biased their responses.

My aim for this exploratory project was to capture current feedback from participants for EPP to enable marketing improvement, not for generalization for the field of study. However, this "moment in time" context may have relevance to understanding the buyer ecosystem for university eBook purchases or other large-scale intermediated purchases.

For this exploration, subject librarians' interview insight, together with secondary data from other librarians and the document analysis from job postings and organization charts combined to formulate informed responses to my study's key investigative questions. What follows are findings about the university library buyer ecosystem where the subject librarian performs a multifaceted, emergent job role.

VIII. Findings

Research Question 1	Finding 1
How does the subject librarian participate in the selection and the purchase of eBooks at very large research institutions?	**The Subject Librarian Is a Key Customer and Stakeholder in the Purchase Process.**

To uncover how subject librarians participate in the buy cycle, Rossomme's (2003) framework offered a way to question participants on how they perceived their relationships with eBook providers. The subject librarian cohort of 11 were asked which roles they identified with (buyer, decider, influencer, gatekeeper). All 11 stated that they are the "decider." This was expected, given that one of the main roles and responsibilities of the subject librarian is "selector" of learning materials. Subject librarians discussed ways in which they contribute to the purchase, alongside their acquisitions librarian peer, who was routinely described as the main contact of the providers. Most did not engage in direct conversations with providers, but did connect to aggregators, such as GOBI and ProQuest, in their direct prepurchase activities in the purchase workflow, such as selection among options for how to fulfill an eBook request or topical pools for plans. However, despite being involved in these prepurchase activities, they typically did not consider "buying" to be reflective of their role. One librarian embraced their role as purchaser in the opening sentence of describing their job role, "I monitor usage for the collection, and I do most of the purchasing," Participant 10 (DPR9). The participants of this study work for R1 universities where the library system is large and roles are dispersed, with less overlap in acquisitions and subject selection than at smaller universities.
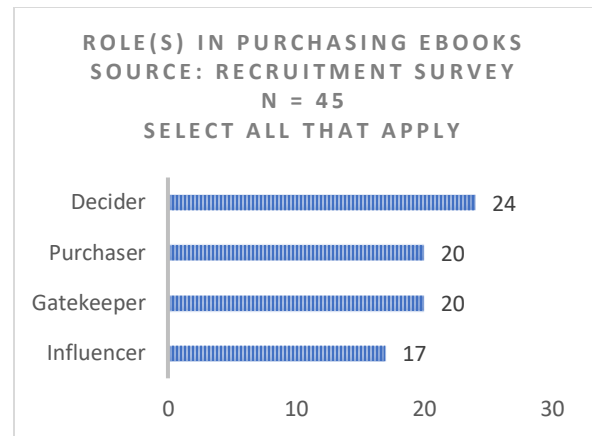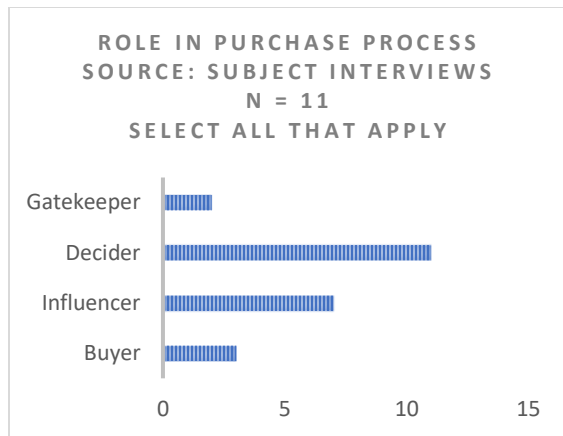
Nine of the 11 purchased through GOBI, a third-party aggregator of many eBook providers. They discussed the filling out of order forms as selector/decider, and in so doing, allocating budget for purchase, but again, most conveyed that the acquisitions librarians were those who set the terms of the ordering and were more overtly the buyer. The other two librarians used ProQuest, a competitor of GOBI, for ordering. They also discussed the order form and allocation of their budgets accordingly. A librarian from a large public university explains how they select titles within the parameters of a pre-populated approval plan:

> *[Buying] varies from selector to selector and their behavior is different. I love buying books, so I don't know why some people don't, I don't know if it's the approval plan process of suggested titles, and I don't know if it's that we use GOBI as our interface for that, or I just don't know if they are scrolling through this endless list of books where you don't get that much information so you have to click on certain things to find out more. I don't know if it's just overwhelming decision fatigue. –Participant 6*

Indeed, the data reveals that the process is complex, and that "the customer" is not a single buyer. Instead, it is a group of informed stakeholders who collectively influence the purchase decision. Subject librarians are key members of this group because they allocate their departmental purchasing budget and they use their subject expertise to create the topical parameters for approval, DDA, and EBA plans.

However, the subject librarians identified less with the roles of influencer and gatekeeper than expected when compared to the recruiting survey responses (Figure 4). The selector role and referent power that comes with budget allocation did not translate to influence in the interviews. Those that did engage on influence recognized their impact as *on* their users, as opposed to *on* purchasing. For instance, their decisions influence end users' experiences because they choose the provider, and therefore decide how to actualize the material via selection pools, formats, and concurrent user plans. Because the acquisitions librarians set and monitor the overall plans with the vendor, that relationship resonated as a "purchaser." According to one librarian, "It's actually the acquisitions staff who manage the mechanics of acquisitions, but they're separate from us. It's a special team of acquisitions that negotiate value," (Participant 2).

Figure 4: Subject Librarian Self-Reported Role(s) in Buy Cycle

ROLE IN PURCHASE PROCESS
SOURCE: SUBJECT INTERVIEWS
N = 11
SELECT ALL THAT APPLY

Role	
Gatekeeper	(2)
Decider	(11)
Influencer	(7)
Buyer	(3)

ROLE(S) IN PURCHASING EBOOKS
SOURCE: RECRUITMENT SURVEY
N = 45
SELECT ALL THAT APPLY

Role	
Decider	24
Purchaser	20
Gatekeeper	20
Influencer	17

Responses to the gatekeeper role varied. Some found it to be negative and did not identify with it. Others were pragmatic, agreeing that they do play that role in the buy cycle as allocator and decider among plans because an eBook can be purchased from a variety of providers. Participant 5 identified with gatekeeping on matters of budget. Designating the provider is power that the subject librarian holds as "selector," yet only one participant fully claimed the role, stating:

> *As gatekeeper, this is your role: you are responsible for this budget, you are responsible for this collection, and you're responsible to help your constituents understand what this collection is and what it isn't, what it's going to be and what it isn't going to be, and to help bring people along by raising these issues—thinking about these things and not just about the money. Thinking about the license, the terms of use, the user experience, and all of these things that factor in. It's our job to not just give people what they want, but to help move them in a direction so they understand that this is the way that we have to do our work to provide the best experience and to be the best stewards of the money and to have a collection that is aligned with our values. –Participant 7*

At three of the four universities, at least one subject librarian felt that the term "gatekeeper" was the opposite of who they are, which is as an advocate for, not adversary of, faculty. Gatekeeper, for these participants, carried a negative connotation.

Thematic Findings

In addition to the designation with which they identified, in describing the purchase process they conveyed a complex network of competing and overlapping plans by myriad providers running concurrently. Subject librarians discussed overlapping plans, how delays in availability can lead to duplication, and an activity called "deduping" or weeding. Two subject librarians from different universities summarize the role, the process, the complexity, and the belief that the strategy subject librarians are expected to apply is difficult to execute in similar ways:

All the different parameters, like if you have a DDA plan with GOBI and you have one with your consortium, and then do you need the evidence based to fill in the gaps? Because it seems like we don't want to even think about where we might have duplication, and can you be really strategic with what's left over after all the on-demand plans? Different.
                                    –Participant 2

It's complicated. There's constant overlap, and not only that, there's often multiple options. There are some titles that appear to be available only from third-party providers and there are some titles that are available on any platforms but the features of the platforms are different, the cost on each platform is different, the access options on each platform are different. This is a big headache for us. –Participant 3

At each library, subject librarians ordered based on a combination of title-by-title, approval plans through either GOBI or ProQuest. Each library had access to at least one demand-driven acquisitions (DDA) plan through GOBI or ProQuest and their consortium. Two libraries had access to EPP's DDA plan via GOBI, and one planned to add EPP's DDA plan this fall once it was available through ProQuest. GOBI was mentioned 39 times in the interviews, with a positive sentiment to just a few mentions of ProQuest, also mostly positive. In five of these conversations, GOBI and ProQuest actually seemed to be the gatekeepers, as their university library selected these point solutions programs as the means of access for virtually every purchase.

> *We're calling it an octopus with a lot of tentacles because for individual eBooks it's the way that GOBI handles our acquisitions, actually. I mean they put it through. We order through GOBI's approval plan and order title-by-title. We give it to them, they give it to [provider] and it passes through to users. –Participant 7*

On-Demand Plans: Demand-Driven Acquisitions (DDA) and Evidence-Based Acquisitions (EBA)

In several sessions, DDA processes was one of the lengthier discussions. The term DDA was stated more than 30 times; EBA was used just 17 times. Every subject librarian interviewed participated in DDA plans, but fewer of them participated in EBA than expected. Subject librarians expressed varying measures of satisfaction regarding DDA plans, ranging from positive, "it was a smash hit," (Participant 1) to suspicion due to how triggers are counted as determiners of interest (Participant 5). As minders of budget allocations, an unwieldy DDA plan can be expensive, and one participant felt that they pay for its success when they must purchase the accessed titles. Because triggers activate purchase from the pool, an unmonitored pool can get expensive. One librarian cited time-on-task necessary to administer this as a reason not to do it, and another wondered whether it was actually worth the effort. Being judicious up-front, when selecting the on-demand pool, is important for managing budgets:

> *Some publishers' eBooks always cost a lot of money. Sometimes they're good and it's worth it and sometimes, well, we're going to let the user decide. So we have a bunch of publishers in this DDA pool. We load the records. Then, for most of them, first use just triggers a percentage charge of the price. And then the second use, it triggers a purchase. –Participant 3*

Of the DDA participants, many mentioned the challenge of getting and finding the time to properly analyze usage reports, which were described as lengthy and cumbersome. Later, in discussing Theme 2, I will discuss reporting in more detail. Here, the complexity and

burdensome nature of reporting are embedded in views of the DDA purchase process within the wider buyer ecosystem:

> *[DDA] is always kind of unwieldy, and that's still kind of newish for some of us. We're getting reports directly from the publishers or the aggregators and then we're having to look at it, and it's a lot of work and there's so many, so trying to decide is difficult, it can be overwhelming. So we've just put it in and opened it up completely, then see what's purchased, as opposed to more targeted selection. It's just a lot of work and there's no 'complete set' plan, so we're kind of still seeing how things work and doesn't work and what's the most efficient. –Participant 11*

A few participants mentioned the potential for duplication given the multiple on-demand programs running concurrently at their libraries. "Duplication is definitely an issue. You could see that things were coming in on different packages. I shudder to think how much of that we have had," (Participant 5). Still others found that DDA plans offer some assurance that the library is opting for the materials users want and need, rather than relying on the decisions of intermediaries:

> *We just load them up and if somebody wants it, we buy it. And that's fine. It takes the guessing out. Some books look really great but they just don't meet a need…. I was an early adopter of [DDA] here in 2013. I'm really more about DDA and EBA rather than having the book, potentially just sit on the shelf for 30 years and no one uses it. Let the users decide. –Participant 9*

The data from the interviews and the literature informed the following process map (Figure 5), which provides a view of purchase plans running concurrently at the libraries. It shows the participation of the subject librarian from the very beginning in selected parameters for the access pools. The collaboration among acquisitions, eResources, and subject librarians is evident. Importantly, though, the diagram shows how and where the role of the subject librarian in the process changes depending on the process.

Figure 5: Concurrent Purchase Plans Processes at the University Libraries Studied

On-Demand Purchase Plans Processes
Evidence-Based Acquisition (EBA) & Demand-Driven Acquisition (DDA)
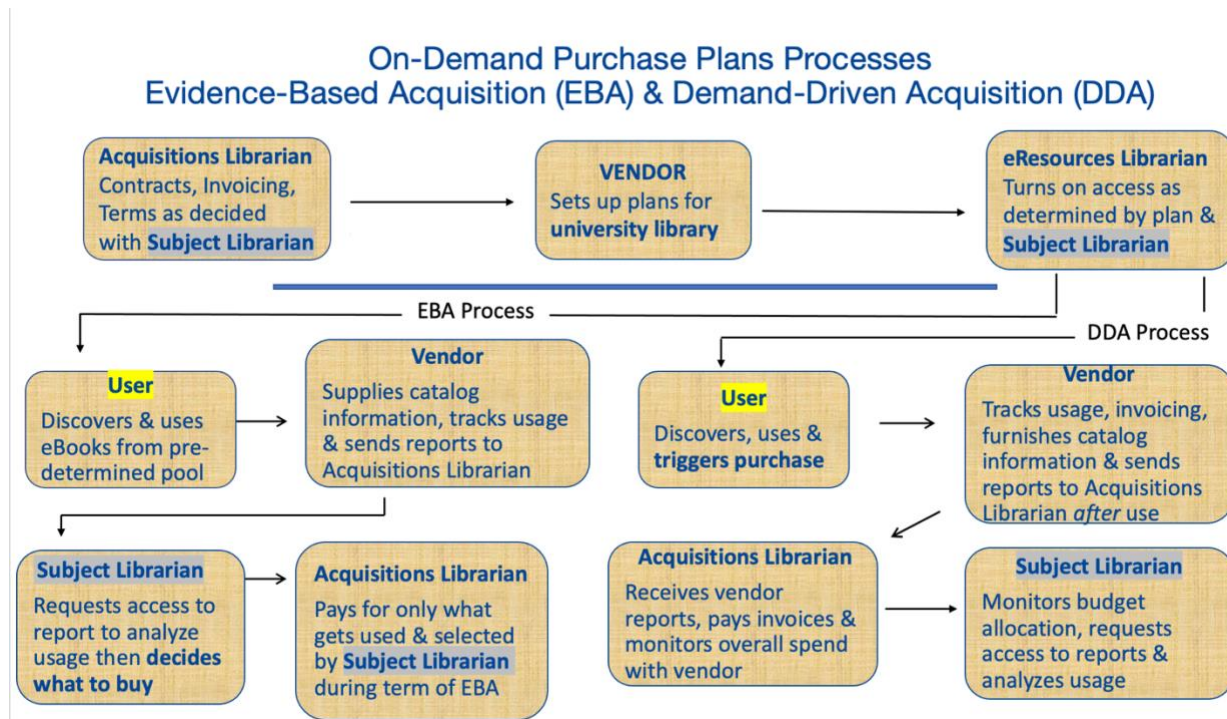
Who's [Really] Purchasing in the On-Demand Buy Cycle?

Triangulating the data, the literature, the provider information, and piecing together the underlying processes as related by the subject librarians, on-demand purchase processes have changed the buy cycle. Despite each subject librarian stating that their job role is first and foremost a selector of eBooks, in popular DDA plans the actual "purchase" of eBooks occurs when the user accesses the eBook and triggers the purchase. In emergent EBA plans, the process also changes, but as the subject librarian takes on a greater role, it holds promise as an area for provider-librarian value cocreation, which I will address later.

The research and the subject librarians themselves have identified as 1) selectors or deciders of eBooks for purchase, and, sometimes, as 2) buyers and 3) influencers on which eBooks to purchase, and even 5) the gatekeepers. The interview participants have discussed their DDA and EBA plans and the processes involved. What is interesting to reconcile is that aside

from participating in creating the very broad parameter of topics from which the pool of eBook

titles for access in these on-demand plans is created, the subject librarians are not actually

selecting or even purchasing in these plans—the user is. The subject librarian is not actually

deciding—the user is. The subject librarian is not triggering the purchase—the user is. The

subject librarian is not a gatekeeper in this scenario. The subject librarian role may be merely an

influencer. Whether or not this stance is well understood, on-demand plans have certainly

factored in changing the role of the subject librarian. If the change is positive or negative

depends on the situation, the plan, and one's point-of-view, "I think some people would be super

surprised to find out that the biggest way that I buy books is basically through artificial

intelligence," (Participant 5). The following charts depict how many participants participate in

each on-demand plan.

Figure 6: Interview Participant Participation in On-Demand Plans
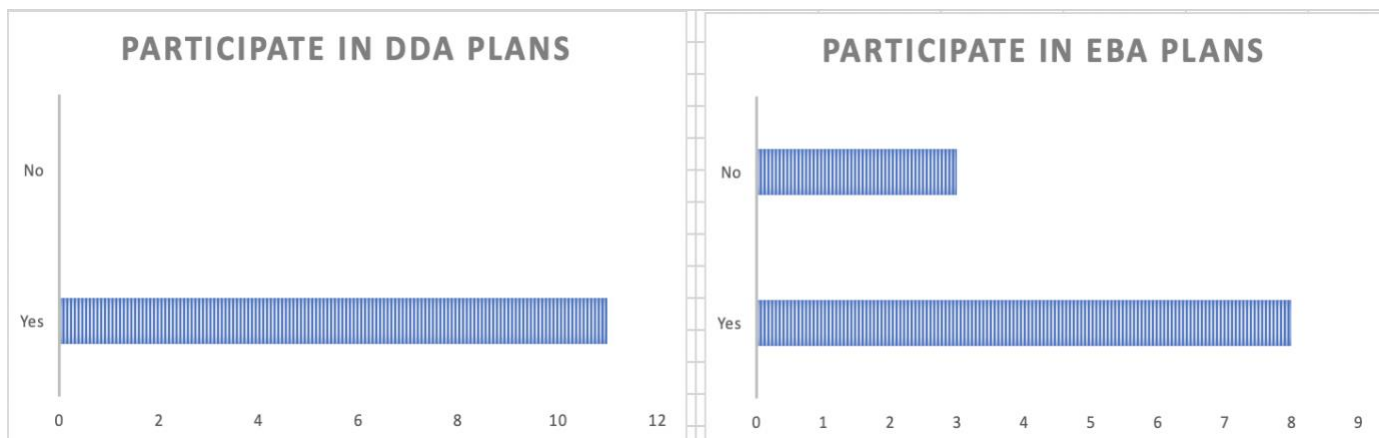
DDA Plans and the Subject Librarian

Of course, there remains much prepurchase work on the part of the subject librarian, but the

user in the process is the acquisitions agent, and some librarians have adapted their role to the

process. However, by taking the decision-making authority out of the subject librarian's purview,

DDA plans may be viewed as devaluing the subject librarian role, specifically as "selector."

This possibility was never indicated or addressed in the interviews. A typical role description states, "As selector I am the one primarily who does all of our collection development" (Participant 8). Questioning this dissonance, I sent the follow-on survey to the participants and received quick responses from all 11. For most of the participants, DDA significantly impact their university in *positive* ways. Just two librarians evaluated DDA as having minimal impact. No participants chose "DDA has a significant negative impact on how my institution selects and purchases eBooks" (Figure 7).
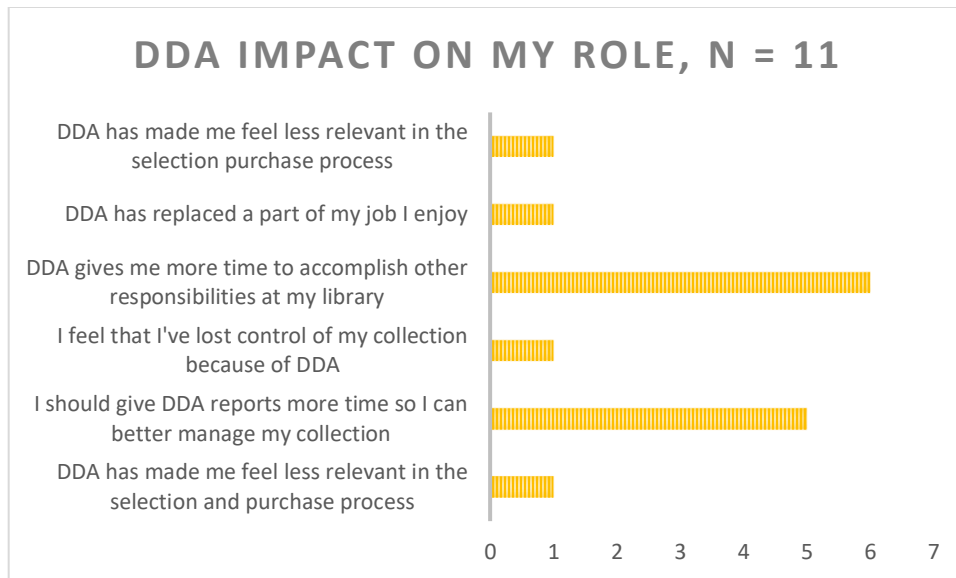
Figure 7: How Interview Participants View DDA Impact
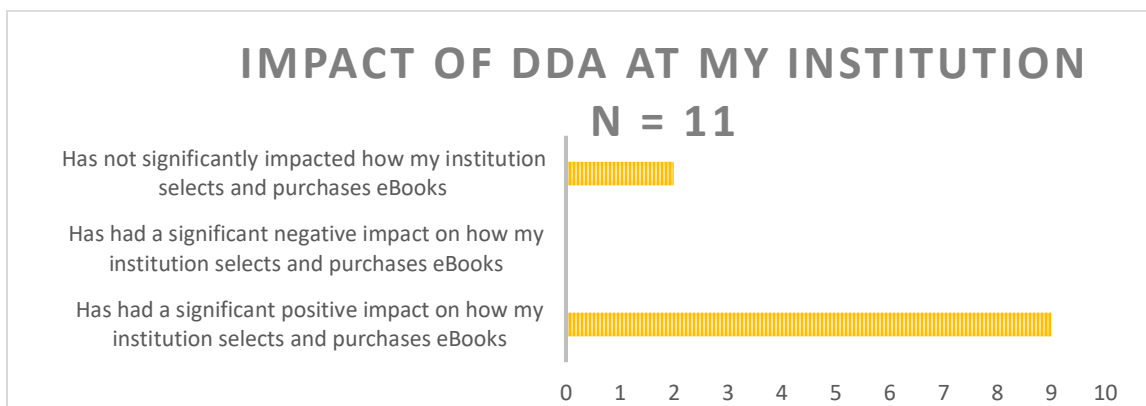
On the topic of actually how much time DDA actually saves, results were mixed. Some gave it a 2 of 10 on time-savings, while others gave it a 10 out of 10. "The discovery trigger layer is pretty good because we just buy the books for the patron. If they see it, they're like oh wow that would be useful. And that saves a lot of work," (Participant 9). The data shows subject librarian day-to-day activities as similar in scope, but time-savings may be situative.

However, when responding to six "select all that apply" statements related to their job role, the participants' beliefs were not as positive or minimally invasive, as shown in Figure 8. This mirrored one librarian's comment on the loss of control they experience when selection happens via DDA, "There's no priority there's no strategy. We're just responding," (Participant 7).

Figure 8: How DDA Impacts Interview Participants' Job Role

DDA IMPACT ON MY ROLE, N = 11

Statement	Count
DDA has made me feel less relevant in the selection purchase process	1
DDA has replaced a part of my job I enjoy	1
DDA gives me more time to accomplish other responsibilities at my library	6
I feel that I've lost control of my collection because of DDA	1
I should give DDA reports more time so I can better manage my collection	5
DDA has made me feel less relevant in the selection and purchase process	1

Traditionally, the role of "selector" has been a touchstone for subject librarians. But, the three other main activities that are immersive—reference duty, faculty liaison, and teaching and learning obligations—have been consistently voiced as priorities, and often, they have been discussed as areas where the subject librarian wishes to have more time for this relationship work. Going back to the literature, the future of subject librarianship calls for embedded service that prioritizes a blending of skills that aid faculty, students, and other researchers in being information-sophisticated users of digital resources (Corrall, 2015; Johnson, 2018; Johnson, 2019).

EBA Plans and the Subject Librarian

Though fewer subject librarians interviewed participated in EBA plans than anticipated, this on-demand service contains a component for which librarian analysis is required, so it may be increasing the importance of the subject librarian while also changing the skill set required to one with a greater emphasis on data-driven decision-making. Some librarians embrace that change, while also bringing in a healthy dose of skepticism on how collection and selection decisions are actually being made.

> *I look at [EBA data] and I'm like give me the top 10 titles and I could do that analysis. But what can you tell by the TOC? One of the things [users] can do is to see and look. Whatever that makes sense for exactly is—what? You're saying how many people looked at the TOC and then did they download or didn't they. What evidence is that giving you?* –Participant 7

This is an opportunity for EPP marketing to amplify the features and benefits of EBA more broadly while also listening to and learning from subject librarians about where the pain points and challenges to adoption are. This will be addressed in Recommendations. In each case where EBA was used, it was used alongside DDA.

> *We've hatched many plans. Many were our EBAs and our DDA. Already during this year we hatched EBA with Taylor and Francis. EBA with The New Deal. With [EPP] we have just one EBA, but we have a system-wide level one DDA there, too.* –Participant 2

From the participant interviews, the data shows that in some disciplines (STEM, business), eBook monographs are not used frequently, but chapters can be; therefore title-by-title requests are more dominant for offerings that are packaged as chapters, such as EPP's. Other disciplines perform better with DDA, such as humanities, arts and sciences, and education. Subject librarians interviewed tend to run several on-demand plans concurrently, which complicates the process. The best experiences were depicted as running DDA and EBA concurrently: "The best way is to use DDA and EBA together (Participant 1); "We try a bit of EBA and DDA and just try a little bit of everything and try to get a good mix" (Participant 5). For these R1 librarians, packaged approval plans, which are already not as cost effective, are even less so since the emergence of DDA and EBA, and user experience and user context also continue to drive decisioning, which will be explored in the next finding.

> *If it's something that's needed for class reading, it's not going to cut it with one book unlimited access. It's changed; it's not cut and dry it really depends on the situation it's more complicated for me, for my discipline, it's really depends—it's pricing and the idea of the user limit and the DRM-free all of those are important.* –Participant 11

Collaboration and Relationships within Buyer Ecosystem.

Subject librarians at R1 universities work together across disciplines as well as in close collaboration with their acquisitions librarian counterparts. The buyer ecosystem is large, and the libraries employ dozens of librarians and other staff. Most of the participants interviewed serve on campus-wide collections committees as well as university-systemwide, consortium-level collections committees. One subject librarian states,

> *We're very collaborative. I'd rather spend the funds collectively if that content is being used by all of us. We advise associate university librarians. We look at vendors together. We look at plans together. We pool leftover funds sometimes. We compare plans and options and have preferences on vendors that usually align." –Participant 8*

Research Question 2	Finding 2
What factors do subject librarians consider in selecting eBooks for their collections?	**Subject Librarians Influence Decisions on What to Buy.**

The subject librarian's perspective is instrumental in determining the factors that influence decisions on what to buy. As the intermediary between providers and the acquisitions librarians on one side and faculty and students on the other, the subject librarian represents user interests in the decision-making process. However, "users" of eBook services split into two distinct groups—the subject librarians' needs as decider/buyer and those of the end users, faculty and students. The factors conveyed by the interview participants represent those of the buyer and those of the end use—as interpreted by the subject librarian. As intermediator, the subject librarian has significant purchase power within the buyer ecosystem because they determine value and convey the influence from stakeholders. The subject librarian has many options when

deciding on ways to fulfill eBook requests. As detailed earlier, there are many plans in place with aggregators, publishers, and providers to choose among, as well as one-off, title-by-title determinations. Although some of these choices are made at the university level, when it comes to selecting from an array of eBook formats within the plan, subject librarians base their decisions on key factors. Of the many factors discussed, the three main interests expressed align to user experience (UX), return on investment, and service quality.

User Experience

Subject librarians were eager to share their stories about their constituents and their needs. One reality conveyed about eBook usage in scholarship is that often students don't know they are working with eBook chapters because they are so accustomed to accessing digital journal articles (eJournals). This leads to surprises when the result of their search leads to HTML pages without page numbers instead of downloadable PDFs. Then, students may go directly to the reference desk for help or to the reference desk through faculty. Either way, the subject librarian is the one to explain what the student has searched on, discovered, and accessed:

> *Oftentimes, they don't know what they are accessing. They just want to be able to find page numbers of this book and they want to be able to get into it, and they get really frustrated when they can't. It's what they expect, partly because that's how articles work. If you've got an article you get a PDF. You can print it out, you can read the whole thing, and your whole class can read the whole thing at the same time. And that's what they see as eBooks and they're like "Why does this book not work like the article PDF?" –Participant 8*

Users are often unaware that their experience is mediated by the subject librarian. Some users will know that they prefer unrestricted PDF to HTML formats, but will not have awareness that these are decision factors as opposed to happenstance. Participant 4 characterized the requests for optimal UX as this, "Is there a way when you're looking at the catalog that you can tell which are the good eBooks? I said, tell me what you mean by the good ones, and they said

the ones that don't ever go away—can you flag those?" His colleague was even more explicit in describing what users want:

> *The way a user thinks of it is, I don't want the book to disappear. I want a permanent book. I want a PDF. They tell me they don't care about screen adjustment or responsive design because they read it on their laptop, not their phone. They want replicas of the original print edition, especially in arts and humanities. They want page numbers. They don't want things changing. They don't want to hear about how HTML format is flexible. That means it changes. They're like "what I want is a solid citation! I want a page number!" That's what scholarship demands.* –Participant 3

Given a choice, every librarian interviewed selects DRM-free, downloadable PDF as the optimal format. This is because it is the best facsimile of the original print version. It is the easiest for faculty and students to use for their research because it may be saved, downloaded, and printed with a high degree of fidelity, and, with certain providers, available in perpetuity in a consistent way. Only a few providers offer this level of quality, and EPP is among them. Most librarians called out EPP as a provider with a predictable level of good service. This is important to subject librarians because they care about the experience of the user and if they receive favorable service, there are fewer usage issues that they will need to troubleshoot as faculty liaison and reference support resource for students.

> *I like unlimited usage, which is not that much more cost-wise than a single license so if it's affordable, I always go unlimited. I'll also choose [EPP] just because oftentimes, in my opinion, in a platform, if we know it's reliable, if we have great vendor support it's well worth it so with eBooks if there is that option it's relatively affordable that's usually what we do.* –Participant 8

Importantly, licenses and terms of use for eBooks impact their utility. The subject librarian must understand and differentiate among plans, matching strategy to situation. For example, if a faculty member has a course reserve reading, the subject librarian needs to know so they can ensure there is unlimited, simultaneous usage permitted. Otherwise, only one or a few students would be able to access it, leaving other students out of the required experience.

However, if a faculty member is interested in an eBook for personal research, the subject librarian may choose a single user or three-user option, saving budget for other needs. Having predictable experiences with preferred platforms is also a factor. According to Participant 8, "the more stuff you can put in the same place is always better for a user" and then summarizes the value proposition: "the plans that offer us the most content our users need in the interfaces that are good and reliable, well, the value is there."

Budget Matters, Pricing, ROI

As keeper of the budget allocation, the subject librarian holds purchase power and the ability to use their discretion, backed by understanding of the discipline, the UX, and cost-benefit analysis. The cheapest version is not necessarily the best choice because the UX may be wanting. "Absolutely [UX] matters. Usability is a driver. If I ever have the option for [EPP] I'll pay a lot more for it" (Participant 4). Counterintuitively, eBooks are usually more expensive than print editions. This is because of their terms of use, often greater than one all the way up to unlimited, concurrent usage. "Cost is also a big consideration because often, eBooks are a good deal more expensive than print books" (Participant 10). Participant 10 went on to explain that the other factor when deciding between print and eBook is that sometimes there is lag time between availability of the print and eBook version. This is not the same as a publisher's delay in creating the eBook version, which can be a factor in selecting a print copy (expediency). The delay in eBook availability may be on the provider or aggregator's side. So, there may be another decision —purchase the eBook directly from a publisher to get it more quickly versus waiting for the provider to make the resource available on their platform and/or aggregator pick list. Monitoring usage is another way to keep costs contained:

> *If there's no DRM-free option, I often will buy a one-user to start. Not every librarian does that, but*
> *I like to save my pennies and then, if we're getting a lot of usage, I will up the license for more*

> *simultaneous users, but I don't love spending an extra hundred until I know there's usage and not*
> *on this format. –Participant 11*

Though the subject librarians in this study were cost-conscious, they did not present instances where they overruled faculty requests for eBooks, which speaks to the mutual level of trust in their relationships. Participant 2 explains: "We're supposed to be good stewards of our collections and of our money. Typically, I don't get requests, that are not reasonable, and I don't ask [faculty] to justify why something's important to them." Though the literature presented price as a determining factor in on-demand plans, the data in this study suggests that expensive DDA plans are not cost-prohibitive, given return-on-investment evaluations (Carrico, Cataldo, & Botero, 2015; Roll, 2015; Zhang, et al., 2015; Schroeder & Boughan, 2017; Lewis & Kennedy, 2019; Downey & Zhang (2020); Strothmann & Rupp-Serrano, 2020). The reasonable explanations given for this were that the private and public R1 universities studied are large, well-endowed, and part of consortia that leverage optimal purchasing power than smaller library systems (Participants 2, 3, 5, 7). They pay more, but they get more, as well.

Reports: "I wish had better access to the eBook usage data."

Subject librarians manage their collection and their budget allocation. Critical to these responsibilities is information, which is furnished through provider-generated reports. Easy to use, readily available, and timely provider reports are essential. Providers are wanting in this area.

> *We talk about how we should be looking at reports more. And being more selective but the*
> *challenge is that it's an overwhelming amount of data and it's just so time intensive to look*
> *through like 300 titles, as part of a subgroup in your discipline, and we just don't have time to look*
> *at each 300 titles, for the 20 different providers in the same year. To do that over time is just hard.*
> *–Participant 7*

Unlike eJournal reports, which are easily sorted by a finite amount of journal titles, every eBook is uniquely titled, and the list of eBooks is long and not helpfully sorted. This makes finding usage patterns and applying cost metrics cumbersome. Another pain point for librarians is that reports are not consistently provided in a standard manner. With regard to usage reports, the most common challenge for subject librarians is that reports are simply too overwhelming to be analyzed consistently and thoroughly. "I'm a little less systematic about how I look at eBook usage, which is from all different vendors, though I'm quite systematic about how I look at print circulation, which is all in one place" (Participant 10).

When asked about challenges, subject librarians unanimously asked for their own, on-demand reporting tailored to their discipline instead of having to request generic reports from a single source at their university library.

> *I try to look at everything eBooks but it's a little tricky because I have to ask for that information. I find it quite useful for looking at the top, high-usage titles, which tells me something about our patron needs and interests and what's being used in the curriculum. I find that helpful for purchasing for them. But, the complexity of reports! There are different eBook reports, and a lot more eBooks than there are channels, so they tend to be giant files. We look at yearly usage, patterns, cost-per-use—that we look at a lot.* –Participant 10

Several survey participants mentioned the importance of turnaway data, which is a count of how frequently would-be-users are denied access to eResources. Turnaway data is used differently for eBooks than for eJournals, as explained by Participant 10: "Turnaway data is very useful to me. If there's an eBook that's getting a lot of turnaways it usually indicates we have one user and we're getting other people trying to access it. If I can spot that I will up the user limit." Subject librarians are trained to be resourceful, so it was not surprising that they had ideas for reports.

Table 7: Ideas from Subject Librarians for Additional Reporting and Why

| **Upcoming Titles List**	If the DRM-free version is coming soon from another provider, you will wait for it or only get a single-use license to the lesser quality version.
Active Titles List	To track usage of only the actively used titles because there is an "overwhelming" amount of new titles each month to sort through.
Format Filter	If you know you only want the unlimited, DRM-free choices.
Trigger Count Filter	If you want to know which versions have a more favorable access plan for users who are simply looking up a fact versus consuming a book cover-to-cover.
Comparable Collections Data	Know what similar universities are selecting to use as a curated collection or recommendation to save time.

These reporting ideas are expanded on in the Recommendations section. Such themes related to the needs of subject librarians are important ways that value may be furnished by service providers, which translates into a competitive advantage.

Research Question 3	**Finding 3**
How do on-demand acquisitions processes impact the role of the subject librarian at very large research institutions?	**The Subject Librarian's Role Is Multifaceted and Purpose-Driven.**

The way eBooks are purchased is rapidly changing, and subject librarian job function is affected. Specifically, new, on-demand acquisitions processes impact the role of the subject librarian. As revealed earlier, in DDA plans purchases are decided by the user within the wide

parameters of the collection as set by the subject librarian. Potentially, this affords more time for

other responsibilities. The following chart conveys some of the key activities subject librarians

perform in addition to their primary responsibilities (selecting, faculty liaison, reference duty,

teaching, and learning). Due to snowball sampling, I may have gotten more participants because

they were on selection committees, so this Paredo chart (Figure 9) may have overrepresentation

on the committee work. Subject librarians all manage budgets, yet only five participants

mentioned it, which was surprising. Perhaps this essential activity was too obvious to mention.

Figure 9: Subject Librarian Self-Reported Secondary Responsibilities
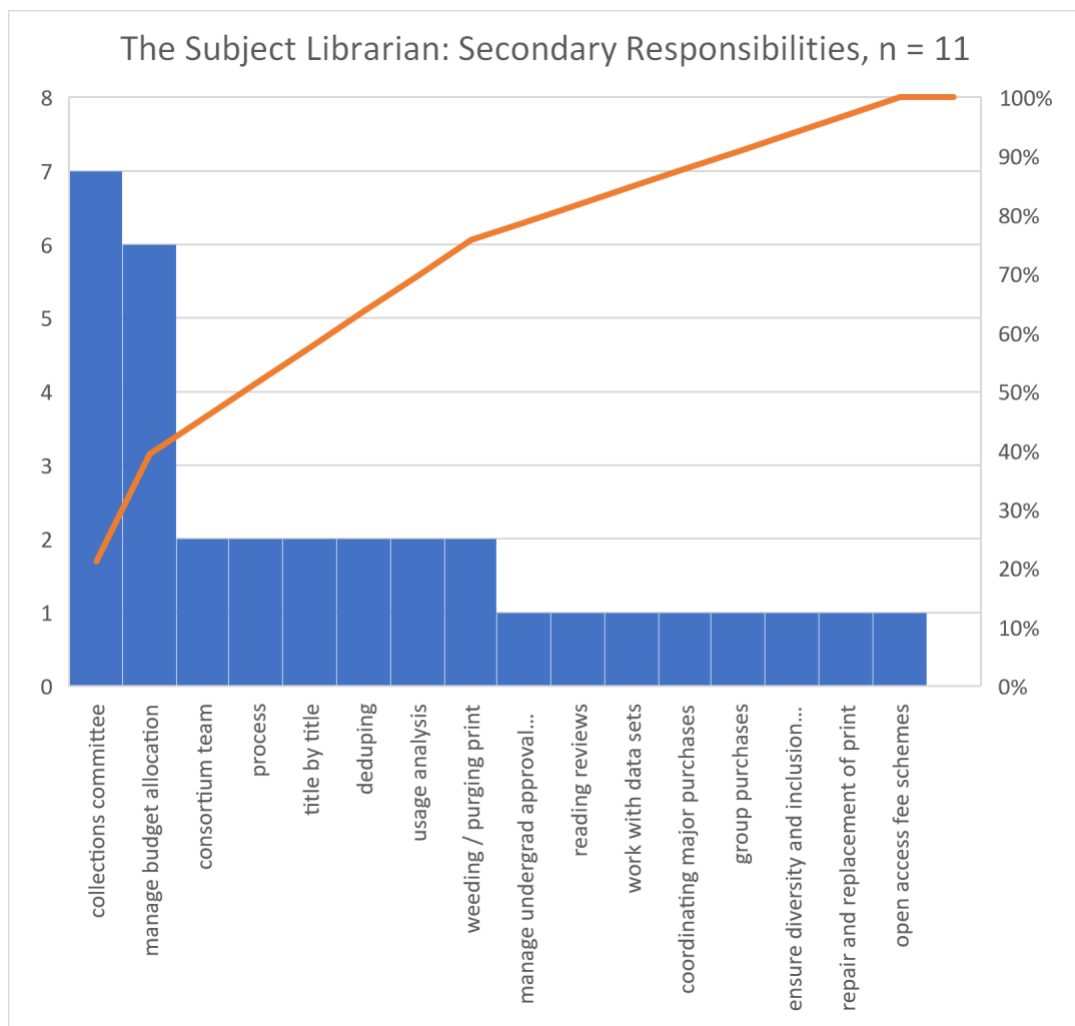
What was consistently expressed is that subject librarians care about helping their constituents access needed materials in predictable ways that are consistently useful. When subject librarians are enabled to select the eBook provider that makes needed content available and easier to use, they do what they can to make it a reality. This connects back to the UX theme discussed previously. The first need is for the content to be available. DDA plans help to ensure the eBooks needed are discoverable by users. One objective of the DDA plans is that availability is disintermediated by a gatekeeper. After subject librarians draw broad boundaries for their usage pools within their disciplines, if a user wants an eBook, it is very likely to be accessible. In this way, the biases of the selector are removed, creating a more inclusive experience for users.

> *We're all about usage and even if it's not contributing the collection as a whole, and even if in 10 years no one will care about this item if we purchase it. If it had meaning at the time and it had a lot of usage of the time, to us that's a measure of success, even if it's not going to hold some deep intellectual value for a student in 30 years. –Participant 8*

This is a plus for matters related to diversity, equity, and inclusion—something both interview participants and the literature mentioned as important to their collections.

> *It's so challenging to look at a title list and figure out what books represent diverse voices I wish there was a way to filter through things being published for diversity. Either on those topics, or by underrepresented voices, I know it's hard to pull that information out but if [providers] had that I think a lot of libraries would be excited. We hear "how can we make the library collection more diverse." The higher-ups at universities are asking for it. –Participant 8*

Subject librarians must ensure that their collections are well-rounded and beneficial to all.

> *What we need to be doing as librarians is helping to create scientists and engineers who graduate either as undergrads or, as graduate students who are sophisticated users of information. For those who do graduate work and do research they have to have access to the resources they need to do their research and to be able to access scholarly information that they need and to and to understand the whole world of scholarship so they can contribute to it. –Participant 7*

In helping to create information-literate, contributing members of society, the work of subject librarians is given purpose.

The support of faculty in research pursuits and in classroom instruction remains a primary goal for subject librarians. Participant 7 states that it is "part of the liaison role to work with faculty to know that they have the right kind [of eBook license], which is DRM-free and the right terms—unlimited for a class use." Access and consistent use help ensure that stakeholders in the library feel supported. Participant 10 lists their top three concerns regarding a positive constituent experience as "lag time, DRM-free, and diversity." Serving a reluctant eBook user population in the humanities, they and other participants mention that one positive to come out of the pandemic was getting print users to try eBooks. During the pandemic, libraries were closed and print books were not shipping, so eBooks became essential resources for constituents. As campuses reopened, print books started to deliver again, but unpacked boxes stacked up. Participant 6 champions eBooks, now more than ever: "It's just such a game changer, I mean, we're getting eBooks delivered right now during the pandemic and it's making a huge difference because we get them so much quicker than the print copies."

Jobs of the Future

As noted, evidence-based acquisitions (EBA) plans work similarly to DDA plans, but the titles are vetted by the subject librarian before determining whether the eBook accessed via short-term loan for the user should become a piece of the permanent collection. If DDA causes loss of identity for subject librarians as "selector," EBA increases the selection value of the subject librarian. This may be optimistic for the profession. Data analysis competency is a skill becoming more essential for subject librarians because of the emphasis on evaluating usage reports, particularly EBA plans. Subject librarians must be able to discern return on investment to ensure their budget allocation is used judiciously. These emergent skills may take the

curriculum for subject librarians into a new direction, which may create greater diversity among those who choose to study to become librarians.

The subject librarian skills match skills necessary for the future of work, such as creative problem solving, critical thinking, empathetic communication, and data analysis. By acknowledging that some previously prioritized skills related to selection can now be assisted or handled chiefly by algorithms and recommender functionality, offloading those tasks make room for new capabilities that may attract new talent to the profession.

From the data, it is clear that subject librarians have a varied role that is instrumental to helping faculty and students connect to the scholarly resources they need. Also, they must balance these needs against their allocated budget, all while being judicious stewards of the university collections. Beyond which plan, which providers, and which terms to select in the digital collection, there is also the matter of the print collection. Some faculty expect them to collect both. For today's subject librarians, that is not feasible. The libraries where the participants work are all considered "ePreferred" universities. That is, when given a choice, they select digital. Some librarians talked about storage and space issues. Again, the pandemic helped put it in sharper relief:

> *Now that we're all going to go back in the building, I wonder how many of our behaviors have changed, and we haven't talked about that and how we want it to change going forward. … We've got a giant space problem. And we've been buying for years and years as if that wasn't ever going to be an issue. And now we're waiting [for books to be unpacked that shipped during the pandemic] for the first time in at least decades, and everybody's heads are exploding. –Participant 5*

That being said, there are some decisions for some disciplines at certain times of the year when budgets are tight where the subject librarian must weigh the eBook option based on pricing. Others went the opposite direction, wondering about the sustainability of the eBook.

There's this worry of this sustainability of the eBook model itself. What if they lose funding, stop open access, or multiple use models or go out of business, like during the economic crisis when open access journals lost their funding? –Participant 11

Changing processes, changing formats, and changing roles are all part of the work of the subject librarian. Their experiences and deep knowledge make them ideal partners for providers in cocreating value.

IX. RECOMMENDATIONS

Recommendation 1

Although the primary business partner for EPP is typically acquisition librarians, it is beneficial to appreciate the subject librarians as another critical stakeholder in the purchase process. Subject librarians have a linchpin role, which serves to better understand the needs of the scholarly end users—students and faculty alike. They can provide deep user insights that may be used to strengthen EPP's value proposition. I recommend that EPP marketing direct the information in this study toward creating fresh and fulsome subject librarian personas, acknowledging how the role has changed. As intermediaries, subject librarians speak two languages—that of the discipline specialist they are, and that of the information seekers they represent. They are a motivated resource willing to share their stories. When considered in context of the buyer ecosystem, these personas guide providers on the customer journey.

Recommendation 2

If on-demand plans, such as demand-driven acquisitions (DDA) and evidence-based acquisitions (EBA) represent the selection and purchase method of the future, EPP should work with subject librarians directly to provide them with better tools, insights, and advice. For instance, individual data analytics dashboards by university, by discipline could be created so information can be more immediately available. In addition to more detailed usage data, simple

filters for easier sorting would help identify patterns. Librarians find the reports unwieldy, so this could be a quick win. By operationalizing subject librarians' feedback, EPP will demonstrate it listens to its customers. Being an easier provider to work with will build customer loyalty. In addition, because EPP is offered through popular aggregators, such as GOBI and ProQuest, proactively making available upcoming titles and active title lists will provide librarians information for strategic decision-making. This way, subject librarians can wait for EPP's superior format and better terms if they know its eBooks are coming soon. And, because subject librarians are choosing among many providers, EPP should differentiate its advantages, such as DRM-free formats, unlimited downloading privileges, and representative publishers. EPP should use its position of powerful provider to get aggregators to note advantages on the order form. Early adopters of EPP are retiring and new librarians are joining the customer pool. Not every selector knows EPP's value proposition and how its service is mission-driven.

As a not-for-profit, EPP has the most generous trigger count plan of any provider. Not all subject librarians know this. When every dollar counts as budgets constrict, having the best plan that makes DDA and EBA budgets go further matters. Some plans trigger a purchase on the first access, and this is costly. Better awareness of the manner in which EPP counts is welcomed service value insight. Similarly, some interview participants were familiar with the digital humanities program at EPP. They urge EPP to be more generous with their platform to be a part of groundbreaking research. EPP has been providing eBooks for nearly 10 years and the data collected over this time period is valuable to librarians. Curating collections is complex, cumbersome, and time-consuming. Making comparable library purchase programs available as model collections will save time for newer subject librarians and seasoned experts alike.

Recommendation 3

EPP has collected academic user data for more than 25 years. It knows preferences, profiles, and has a staff of librarians and analysts that can parse it. Subject librarians are eager to build diverse, inclusive, and unbiased collections. This is an important yet overwhelming project to get underway, and access to EPP's vast stores of data could help in this effort. Smart EPP staffers might find a way to measure the diversity of a collection and share results and best practices for collection-building. When this is done intentionally, influential subject librarians are supported in their collection management. In turn, these partners may become dedicated brand ambassadors. This is an exemplar for value cocreation.

Recommendation 4

Several of the librarians I spoke with wished they had more time for other responsibilities, so my advice for EPP is to create dedicated roles that assist subject librarians in their teaching, learning, and reference duties. Become the "eBook preferred provider of choice" for subject librarians. When users discover most of their needs on a single platform, it makes it easier for them to do their work, and in turn, it makes the subject librarians' job easier, too by reducing the number of plans and simplifying processes. EPP employs librarians who are former practitioners, and their insight may be used to better advantage. They can create compelling library guides for faculty and students that are data driven, useful, and easy. For instance, one participant pointed out that because EPP is so well-regarded for journals and students are accustomed to citing from it, by offering eBook chapters in a similar style, students often think the book chapter is a journal article, so they mix up the citation. Offer the proper citation directly on the search results page so students can make the correct entry with the click of a button. This will promote better scholarship and repeat users. Another participant noted that the download from EPP does not automatically save with the title. Instead it has just a numerical string. This is

a nuisance for the user because they have to remember to retitle it. By automatically adding the title to the download, EPP can simplify the researcher's work, which leads to fewer questions for the subject librarian working the reference desk. When a brand takes the time to help the user solve problems, the brand builds loyal followers. EPP marketing is dismayed to not be able to market directly to faculty and students. By taking advantage of the relationship with the intermediator, the subject librarian, it won't need to. To operationalize, build on these interviews by forming focus groups at national and regional library meetings. Customers make terrific research and development partners. When you ask them, they will tell you how to keep winning their business.

Finally, as EPP marketing recognizes its need to know the subject librarian customer better, it should also acknowledge the vast changes to the landscape, the profession of librarianship, and the buyer ecosystem. One participant advocated for EPP to get back to its experimental roots from the 1990s by experimenting with access protocols, user behavior, and artificial intelligence to improve how research is conducted. Another participant urges EPP to keep discovering and investing in smaller, lesser-known publishers outside the United States and the United Kingdom, in languages other than English. This is a differentiator, and it also promotes diversity, equity, and inclusion in subsequent collections. The pandemic has been good for eBooks, so it's important to regenerate the collection and spread the mission of scholarly sustainability.

X. Conclusion

The experiences of subject librarians in this study are meant to be representative of the practices and encounters of academic librarians situated in large universities throughout North America. Between advocating for their constituents and ensuring valuable and defensible choices

are made to the building of their discipline collections, this is a complicated job made more

difficult by the adoption of a variety of on-demand purchase plans. Subject librarians are busy

doing the work of librarianship and adapting their skills to the job description of the future.

These jobs will have an increased emphasis on data analysis and a perspective of evidence-based

decision-making. Stepping back to reflect on the impact of purchase decisions on the collection

as a whole, collection management may be thought of as an all-consuming challenge.

> *We have our preferences in terms of platforms and purchase models but not: What are we buying in eBook and what are we buying in print and now that we're all going to go back on campus how will that change? –Participant 4*

Service providers can help. EPP has done it before. It was first with digital journals and among

the first to offer eBooks in digital, chapter-by-chapter format. Working with librarians to solve

problems for libraries and users is its heritage and its mission. EPP is a well-respected brand, and

subject librarians want to help sustain it. Looking back to the axioms of service-demand logic

(Lusch and Vargo, 2019*)*, it is clear that EPP is in position to partner with subject librarians for

mutual benefit by providing excellent service, cocreating value, engaging in social and economic

activities with institutions, and by listening to what customers say is its value proposition.

> *[EPP] still, by far has the best DDA and EBA offerings, and they have the best content and the best format and I think [EPP] has really changed the game for academic eBooks and the social sciences and humanities. The breadth is amazing, and having all of this access at people's fingertips without DRM is just so amazing. Sure there are ways that [EPP] could improve but they are heads and shoulders above the rest. –Participant 2*

Being of quality and providing value is not new. Continuing to be of service, to have

beneficence, to be resourceful, and to be looking for ways to collaborate with librarians in its

buyer ecosystem will provide lasting benefits to scholarship and the business.

> *Since 2015, when [EPP] launched their books a lot has really evolved and changed, giving the libraries, a little bit more choice and opportunity. I think [EPP] with its mission would like to experiment with these protocols because of their mission of access. –Participant 3*

Partnering with subject librarians in deeper, inventive, and even unexpected ways will support a sustainable future for libraries—physical, digital, on campus, or in the cloud—wherever they may be.

> *Every once in a while, I just get spontaneous expressions from our faculty and students about how incredible all the stuff that we have is that's available online and some of them have said to me, I've been so astonished, I didn't realize the vastness of the online holdings until this year forced me to delve into it and see what was really there. —Participant 4*

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Appendix A: Survey Instruments

1. Recruitment Survey

1. What type of librarian best describes your role? *Select all that apply.*

     h. University Librarian
     i. Head Librarian
     j. Special Librarian
     k. Acquisitions Librarian
     l. Electronic or eResources Librarian
     m. Subject Librarian
     n. Other _____

2. Which role(s) do you perform in the buy cycle for purchasing digital / eResources such as eBooks for your institution. *Select all that apply.*

     g. Purchaser
     h. Decider
     i. Recommender
     j. Influencer
     k. Gatekeeper
     l. User

3. At your university, which librarians or other stakeholders do you work with on purchasing eBooks? *Select all that apply.*

     i. University Librarian
     j. Head Librarian
     k. Special Librarian
     l. Acquisitions Librarian
     m. eResources Librarian
     n. Subject Librarian
     o. Finance
     p. Other _____

4. At your university, is there a formal process and/or committee for purchasing eBooks?

     l. Yes, there is a formal process
     m. No, there is not a formal process

5 a. If yes to above, (there is a formal process), is there a committee?

a. Yes, there is a committee

b.   No, there is not a committee

5 b. If yes to above, (there is a committee), are you on the committee?

a. Yes

b. No

6. Please rank the following in order of most to least important for an eBook purchase.

   a. Price
   b. Speed of order processing
   c. Vendor
   d. Content, overall
   e. Breadth of content (general, core)
   f. Depth of content (focused)
   g. Customer service
   h. Ease of use
   i. High usage data
   j. User request for resource
   k. Positive reviews of resource

7. From the following options, please select your top 3 responsibilities.
   a. Field collection recommendations
   b. Manage budget allocation
   c. Manage collection
   d. Manage digital / eResources purchase and renewal process
   e. Manage staff
   f. Recommendation of digital / eResources for purchase
   g. Selection of digital / eResources
   h. Terms of use for resources
   i. Train constituents on library resources
   j. Troubleshooting digital / eResources
   k. Other _____

2. Interview Participants Follow-on Survey

1. The data indicates DDA (demand-driven acquisitions) as an emergent disruptor in the acquisition process. Which of the following best conveys the impact of DDA at your institution?

    a. DDA has had a significant positive impact on how my institution selects and purchases eBooks.

    b. DDA has had a significant negative impact on how my institution selects and purchases eBooks.

    c. DDA has not significantly impacted how my institution selects and purchases eBooks.

2. Which of the following express your perspective on DDA with regard to your job role? Select all that apply.

    a. DDA gives me more time to accomplish other responsibilities at my library.

    b. DDA has replaced a part of my job I enjoy.

    c. DDA has made me feel less relevant in the selection and purchase process.

    d. I should give DDA reports more time so I can better manage my collection.

    e. I feel that I've lost control of my collection because of DDA.

    f. Other [free response]

3. DDA has saved me time on the job.

    a. Yes

    b. No

4. Do you have a final thought on DDA for me? [free response]

Appendix B: Subject Interview Questions

Research Question 1

- Describe your role and main responsibilities as a subject specialist.
- Describe the eBook purchase process at your library.
- How do you interact with eBook vendors?
- Are you on the committee for eBook selection?
- There are some terms used in a buy cycle: Selector, buyer, purchaser, influencer, gatekeeper—which do you identify with? Why or why not?
- What does the term "gatekeeper" mean to you in this context?
- How do you interact with acquisitions librarians on eBook purchases?
- How do you interact with eResources librarians with regard to eBooks?
- How efficient would you characterize the eBook purchase process as?
- What else should I know about the eBook purchase process?

Research Question 2

- If you interact or have influence in which vendors are used, what factors are considered when selecting a vendor to fulfill eBook orders?
- How are requests for data and reporting handled? Is any provider doing this better than others?
- Are there challenges in getting information, data, reporting from your vendors? Describe.
- Do you have preferred vendors? Why?
- How important is DRM-free for you and your constituents? Why?
- How do user terms influence selection?
- Do you prefer certain purchase plans when making your selections?
- Are you interested in curated collections when making your selections?
- Can you think of ways that vendors might help you be more productive in selection?
- What else would you like to share about eBook providers?
- What improvements would you like to see in products or services that I could take back to my partner organization?

Research Question 3

- Describe your collection development and management philosophy with regard to eBook purchase plans.
- Elaborate on the time spent on collection development versus other responsibilities.
- How much time do you spend on activities related to faculty?

- What are your faculty relationships like?
- What other activities are involved in your collection-building?
- How much time do you spend on allocation and budget-related activity?
- Please elaborate on on-demand purchase models, such as DDA and EBA?
- Are you involved in DDA plans and process? How?
- Are you involved in EBA plans and process? How?
- How has the pandemic impacted eBook selection?
- Describe your work on storage, space, and print vs. digital collection management.
- What activities do you enjoy the most at your job?
- What areas would you like to devote more time to / less time to?
- If you could wave a magic wand and change something about the process, what would that be?

Appendix C: Code Book

THEME	DEFINITION	EXAMPLE
Role in Purchase Process		
buyer; also purchaser, acquirer, acquisition	one who performs the buying of the assets, assesses product or service for purchase, act of buying on behalf of…	"I use GOBI ad I'm the buyer for the eBooks in my department."
decider; also decision-maker, selector; one who chooses, one who selects	one who actually makes the decision in a purchase process	"I decide on which formats or collections to select for my department."
influencer	one who holds knowledge, authority, or insight to sway another	"I am able to work with the acquisitions team and influence whether to get a single or multiple licenses." Note gatekeeper and influencer are different.
gatekeeper; also intermediary, intermediator, link, linchpin	one who must be passed through in order to gain access to something and/or link between groups	"Am I a gatekeeper? Sure. I am the one who determines what we purchase. It needs to be of good quality and good value. I rarely turn a stakeholder down, outright, but I may choose the better format, the better license."
Purchasing Process Complexity		
collaboration; also collections committee, collections council, member, team	advocacy group to work on policies wide-ranging business cases and large deals	I serve on the university's collection committee where I represent my department in large-scale university acquisitions projects and discuss and set policy.
feeling overwhelmed; also data overload, overwhelming, guilt, guilty, data overload, information overload, challenging	pain point or challenge by vast amount of information available on eBooks; may lead to stress or guilt	"It gets really complex when you have all these DDA plans and all the data. I should review it more frequently, I guess."
overlapping purchase plans; approval plans, firm orders, orders, order system, purchase model, acquisitions plans; also duplication, duplicate, dedupe	problems that arise from complex and multiple plans for purchase at the same time; using multiple purchase plans, e.g., DDA, EBA, approval, title-by-title	"Timing can create unnecessary duplicate orders, which can be challenging to monitor and also could result in overspending for the same resource. That is stressful. "

delays; also timing, lag time, late arrival, wait	delays of records following purchase of eBooks	"The delay made it seem like we did not have the eBook; when eBook is made available long after print format."
demand-driven acquisitions or DDA	type of on-demand purchase plan with less librarian involvement	"With DDA the selections are done for me. I guess I have more time for teaching and learning now."
evidence-based acquisitions or EBA	type of on-demand purchase plan with more librarian involvement	"I like EBA and I am doing a program with a publisher. It's a lot of work to set up, but I'm getting good results."
licensing; pertaining to user license; e.g., single-, multiple-, concurrent user license, terms, permissions, user limits, trigger variance	terms of use for concurrent users, when the eBook can be accessed by more than one person at a time	"If the eBook is for a class, I always get a multiple, concurrent license."
relationships; also partner, partnerships, consortia, publishers, aggregators, providers, vendors	people or service providers librarians interact with for eBook services	"My relationships with other libraries are important so we can increase our buying power, such as at the NERL consortia."
collection development; also development	primary job function creating and adding to the library collection; acquiring	"I purchase through GOBI to develop my collection. They offer a variety of plans that are easy for me. It's just filling out the form."
User needs and preferences for eBooks		
eBook format; download; digital, PDF, text; DRM, DRM-free, permissions	digital book formats	"Where can I find the good eBooks to download?"
eBook quality; high-quality; valuable, of value; also replica, fidelity, facsimile to original book format	want the experience to mimic printed version, e.g., have pages that are the same with page numbers and citations, not html view	"I need a real PDF with page numbers, they say. I tell them that not every provider has eBooks that have fidelity to the original. They want that high-quality replica for their scholarship. They want the page number for their papers."

user experience, UX; also end-user, patron, constituent, researcher, scholar, student	attributes of the asset e.g. format that help determine ease of use for user of eBooks	"It's all about the user experience. They want to read, download, and print something that is easy and similar to what a print experience would be like."
access (verb) **concerns;** also accessible; find, discover, discovery, discoverable, search, searchable, search layer, search field, use; also opposite of access: unexpected denial; also denial, access denied, occupied, turnaway	finding and retrieving the eBook digital file for use; here, it means making it discoverable by user: a way to find or discover an eBook in the digital library	"The best platforms have an excellent discovery layer, which makes it easier for users to find and access the material they need."
Librarian needs and preferences from providers		
budget-related; also fund, cost, price, allocate, allocation, deal, value, afford, affordability, valuable, financial	context here is less about "cost" and more about cost-benefit analysis; seeking good quality at a good price, valuable	"I must ensure that I not only get a good price, but that the selection I make is of high-quality and provides value to my stakeholders."
platform service; also service, platform, power of platform, platform solution	speaks to "discoverability" of eBooks and quality of provider	"Their platform search is unparalleled. It is what students require to conduct their research and discover quality materials."
reporting instruments; also report, reports, cheat sheet, data analysis, usage reports, report on demand, analytics	usage information is tabulated and produced for the library to determine usage and fees for access; other reports for specific insights reports typically go to central point of contact in acquisitions dept, not subject librarians, so they have to request reports	"The reports do not come to me. I have to request them. There is so much information. It's very challenging to digest it all."
provider; also vendor, aggregator, publisher / publisher plans / publisher collections	provider of content in eBook form	"Partnerships matter. Some of the publishers are really good about the data. Others, not so much."
diverse and inclusive; also diversity, biases, bias, non-bias, inclusive	important collection attribute	"It is a goal to ensure the collection is diverse for student researchers. Sometimes that means attending to biases from previous eras."

value; also value proposition, return-on investment (ROI)	ensuring the service is good quality and useful	"It's important that I receive good value for my budget allocation."
Subject Librarian responsibilities beyond purchase process		
faculty relationships; liaison, stakeholder, ally, adversary, teacher, professor, faculty	primary relationship; can be ally or adversary; is a user or customer of librarian	"I am a faculty liaison. It is my job to help they successfully use library materials in their classrooms and in their research."
teaching & learning; also teach, learn, information literacy, guide, lib guides, library guides	aspect of job working with faculty to help support students	"For teaching & learning, well, a professor will have me come and talk to the class about searching eBook platforms."
reference duty; also reference desk, desk, student support, on-call resource	aspect of job focused on directly supporting students	"I still do a ton of reference duty, it's just virtual now."
stewardship; also collection management, role in collection management; steward	being responsible for the library collection and management primary job function as manager of the assets in the library	"as far as collection management, I consider the diversity of the library materials to be a focal point of my stewardship."
ePreferred; digital preference for learning materials	stance of library on its preferred format	"Our library is ePreferred, meaning if the title is available in print and eBook, we prefer the eBook. It's more expensive, but it serves the user better. Also, there is the challenge of storage that no one wants to talk about."
Covid-19 impact; also pandemic, covid, lockdown, shuttered, emergency access	COVID-19 pandemic impact on eBooks / librarianship	"We were already ePreferred so the Covid-19 pandemic didn't really change things."

Appendix D: Key Roles and Responsibilities of the Subject Librarian

Collection Building	Collection Management	Reference Duty	Faculty Liaison	Teaching & Learning
Selecting titles and build parameters for discipline's approval plans and on-demand models	Managing budget allocation	Promote academic and scholarly resources in the discipline(s)	Bridge / ally / gatekeeper / influencer	Instruct on information literacy and research best practices
Understand and advocate for access and entitlements of licensing terms	Balancing stakeholder needs and needs of the collection for diversity and inclusion	Troubleshoot platforms and user experience challenges	Course readings and reserves	Conduct tutorials and workshops on resources within discipline(s)
Participate in collections committee work	Data analysis of usage reports	Connect users to discipline's academic resources	Order recommended titles	Digital scholarship resource, assist with datasets from aggregators
Participate in acquisitions consortia work	Preservation and sustainable practices (weeding, replacing, repairing, storing)	Collaborate with other librarians and vendors on Library Guides for users and library policies	Read book reviews	Be a stakeholder in students' academic success

Sources: Johnson, 2019, Johnson, 2018

Appendix E: Common eBook Purchase Plans and Acquisitions Models

Traditional ways of selecting eBooks for collections are similar to print programs: **approval plans** and **title-by-title purchases.**

Approval Plans: a vendor or publisher automates the purchase process based on a predetermined profile that a library sets up. Depending on the provider, the book "ships" or a "slip" is created that notifies the library to request it to be shipped*.

Title-by-title purchases: also known as firm orders are titles that are ordered once and not part of a plan.

On-Demand Acquisitions Plans: Today's libraries often participate in on-demand acquisitions plans. There are two types, **demand-driven acquisitions (DDA)** and **evidence-based acquisitions (EBA).**

Demand-Driven Acquisition (DDA)

A vendor or aggregator collaborates with librarians on a broad collection of titles to be discovered by users at a library. The library pays as users access the title, according to the terms set forth by the library with the vendor partner. The library does not pay for titles in the pool that are not used, and the payment is retroactive to use. The library controls the collection pool offered, but not the purchase behavior.

Evidence-Based Acquisition (EBA)

A vendor or aggregator collaborates with librarians on a curated pool of titles to be discovered by users at a library during a set timeframe on a set budget. After the term ends, the library purchases only what's used based on evidence of user need (access). In this model, the library controls the collection pool *and* the purchase behavior because it is limited.

An advantage of DDA over EBA is that the library is able to offer a very large collection to users for discovery without up-front payment. A disadvantage is that the purchased title control is abdicated to the user, so the collection could become expensive, unwieldy, or even biased without monitoring. Advantages of EBA over DDA is a managed budget and the closer curation or collection management up-front, so the collection that develops through usage involves less risk.

*For eBooks, "shipment" is digital delivery and machine-readable cataloging (MARC) records bibliographic info.

Sources: GOBI.com, JSTOR.com, ProQuest.com