

# eMpowering Acquisitions in mediated selection

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## **Abstract**

*An examination of the issues arising from implementation of a mandated e-preference collection policy for mediated and unmediated selection at a university library, this paper identifies the additional functionality and services needed from publishers, acquisitions vendors and integrated library systems providers to support the full span of collection development activities in a digital world. Issues discussed include reaction from clients, variation in publication lag time between formats, limited vendor support for mediated digital acquisitions, management of client and library staff expectations, incorporation of patron selections, importance of involving acquisitions staff in workflow redesign, and effect on performance targets.*

## Introduction

Like all academic libraries in Australia, the University of South Australia (UniSA) Library has been rapidly acquiring electronic resources. The increase in growth of purchased electronic book titles has averaged 20-30% over the last few years. This increase has been in response to patron demand, physical collection space pressures and also the knowledge that our collections need to be more accessible without constraints of time or location.

The term e-preference is used to throughout this paper to describe privileging digital over print formats for collection development and also for collection replacement purposes. E-preference has now been mandated by the Vice Chancellor who expects the Library to align the collection development focus to reflect the strategic direction of the University. To support this expectation, acquisitions workflows have been re-engineered to incorporate an e-preferred requirement as efficiently as possible.

Technically, an e-preference collection development policy has been in place for the last three years. However, excessive exceptions made to accommodate the individual preference of requestors and selectors have undermined the effectiveness of the policy.

A patron-driven acquisition model is in place for one major ebook aggregator, but the majority of ebooks acquired to date are those forming parts of packages. The literature focuses on e-preference approval plans, licensing and access models, a reflection that little or no work has been undertaken to meet the challenge of implementing mediated e-preference collection development. This paper explores issues around processes and strategies put in place when vendors are only able to support unmediated e-preference, and the challenge faced by the Acquisitions team at the University of South Australia Library.

## Literature Review

Whilst the current acquisitions literature prolifically covers ebooks, there is very limited coverage on firm title ordering for ebooks as the focus is usually on the more novel aspects of ebooks acquisitions such as patron driven acquisitions (PDA) or pay per view (PPV) which enable libraries to acquire and pay for titles that are actually used.

Spitzform (2011, p.22) envisages a future where print and digital editions are simultaneously published and the current situation, whereby the electronic version is published at some future indeterminate point of time, is resolved. In this future scenario, libraries will then be able to acquire titles in their preferred formats 'in a rational, predictable manner rather than the largely hit-and-miss fashion now that results from libraries desiring to purchase more ebooks within their normal workflow, but being forced to purchase the print because of the uncertainty when the electronic format will be issued'.

This ideal situation does not yet exist and is unlikely to do so in the near future. Lack of concurrency in print and digital publication is one of the major impediments to efficient streamlined workflow design for library acquisitions and collection management units.

In late 2009, HighWire Press conducted a major international survey of librarians in order to learn more about how they find and purchase ebooks. Whilst the data is two years old, and new models have emerged in the intervening period, the comments relating to essential and desirable acquisitions vendor platform features and functionalities remain valid. In the report, (2010), the most critical functionalities identified relate to the integration of electronic content with other resources within the platform; the ability to locate the electronic version for a known print title and the capability to search for individual titles or all titles within a platform. Other desirable features include search results filtering for ebook-only content, indication of already held editions and provision of ebook title alerts by subject. Two comments were made regarding concurrency of publication - "Ebook is available when print version is published without delay" and "ebooks must be kept current with new editions published during the life of the ebook subscription". (HighWire Press, 2010, p.19)

Surveyed librarians ranked highly ebook acquisitions processes that mimic the established workflows for printed books. This included ease and integration of purchasing, MARC records and embedded order data (EOD) or embedded order confirmation records (EOCR) and electronic data interchange (EDI) invoicing support for ebooks equivalent to that for print acquisitions. While ebook aggregators and publishers routinely supply brief MARC records free or at a minimal charge, many libraries choose to take advantage of vendor-supplied best available quality records to streamline copy-cataloguing workflows. Even when available directly from publishers, acquiring ebooks through vendors is preferred because libraries can use already established workflows for ordering, licensing, activating, cataloguing and invoicing. This view is supported by Horova (2010, p.147) who in a wide-ranging paper on collection management challenges in academic libraries, comments that operational acquisitions workflows should "leverage vendor services to streamline acquisitions processes and redirect staff to atypical or complex issues that an automated process cannot address".

The ability to purchase ebooks title-by-title, rather than as a collection, is important. The HighWire report commented that further research into this aspect was required as different perspectives were recorded. "A large number of librarians believe that bundling of content by publishers without the option to purchase unbundled parts is the cause of much of what is bad in digital collection development. However, the option to purchase content cannot in itself be considered bad" (HighWire Press, 2010, p.29)

In relation to cost, pricing of ebooks should be reasonable and comparable with print. With ejournals and database subscriptions accounting for substantially more than 50% of most library materials budgets and with volatile exchange rates, many libraries wish to purchase ebooks outright, rather than further increase subscriptions commitments.

UniSA Library aims to provide multiplatform ebooks that are downloadable to a PC and mobile devices for offline access. McKiel (2011, p.2) reports on a 2011 survey on ebook access which finds that the majority of libraries want to provide access to ebooks both online and offline, to PCs and to mobile devices. With 93% of librarians responding that offline access to ebooks is more or equally important than providing online access, he also notes that there is a very clear preference for offline mobile access to ebooks. At this stage, not all ebook platforms offer that capability, and so titles have not been purchased on those platforms.

Digital Rights Management (DRM) restrictions on copying, pasting, and printing imposed by aggregators and distributors also influence ebook purchasing decisions and impact on acquisitions workflows. It is interesting to note that collections acquired directly from some publishers including Springer Verlag and Morgan & Claypool are DRM-free. So whilst direct purchasing from publishers requires a completely manual acquisitions processing, the lack of DRM is attractive as these ebooks are much more user friendly. Finally increasing the number of platforms with unique content will improve the range of titles available for inclusion in the Library ebook collection, and increase the useability of titles.

## Environmental Scan

The rapid growth of ebooks in academic libraries has seen the emergence of new collection development and acquisitions business models, alongside the traditional monograph acquisitions processes. Approval plans, firm ordering, and standing orders from the print monograph world continue together with the new ebook world of publisher and aggregate collections and patron selection. There are various permutations of selection and acquisition methods for ebook content, and the following summary outlines the major features of these models:

- Patron selection – frequently referred to as patron-driven acquisition (PDA) or demand-driven acquisition (DDA). In this model, libraries typically load MARC records for profiled or whole aggregate collections to their catalogue or discovery layer. Access to content is pre-activated by the vendor and when users view or loan the item, an automatic purchase is triggered after a predetermined number of accesses. Titles can be profiled by a number of factors including publication date, subject areas, publisher and price. Demand-driven selection would seem to be an ideal way of building collections and supplementing interlibrary loans; however, due to the reactive nature of the acquisition there is little opportunity for streamlining of workflows. Providers of this model include EBSCO/NetLibrary, ebrary and EBL.
- Publisher subject collections – single publisher collections in disciplines often offered by publication year. Acquisition is by single-line purchase order and invoice usually directly with the publisher, and pricing is heavily discounted over that for individual title purchase. Examples include Springer, Royal Society for Chemistry and ScienceDirect annual subject collections.
- Aggregate collections – subject-based collections from a number of publishers, packaged by a vendor. Often a mix of older and current imprints, the content may not be necessarily stable and supplied MARC records may be of varying quality. Generally, these collections are a subscription service.
- Approval plans – based on print approvals with titles matched to the library profile and shipped. The difference is that titles are activated by the vendor. Libraries can mix and match print and ebook depending on availability, with vendors offering the ability to set a publication date concurrency interval. For example, if the ebook is to be published less than 90 days after the print, then the ebook is ‘shipped’ on approval.
- Firm title ordering – content is selected and purchased title-by-title from vendor websites. Depending on vendor system capabilities, the workflow may

be very similar to that for print workflows with content activation being the functional equivalent to item receipt. Acquisitions workflow support mirrors print and typically includes EOD (embedded order data) or EOCR (embedded order confirmation records); and EDI (electronic data interchange) for ordering and invoicing.

UniSA Library has acquired ebooks since 2001 utilising all of these models, and is currently investigating ebook approval plans. This paper concentrates on firm title ordering.

## **Digital strategy and context**

A digital strategy has been proposed by UniSA Library and is under discussion within the University. This strategy has been created in response to the changing needs of patrons, the Library and the University itself, to find a more systematic and proactive approach to dealing with the changing world of books and their electronic counterparts.

In all libraries, collections continue to increase, resulting in lesser-used titles being relegated to storage. This is a reasonable approach but ultimately unsustainable. An increase in the proportion of electronic titles purchased would reduce these pressures, providing added benefit in increased portability, and convenience for patrons both on and off-campus. Patrons demand more ebooks and have difficulty understanding why not all titles are immediately available to them.

In 2011, 20% of UniSA Library's book collection is digital. The proportion increases with every year, although progress is slower than it really should be. Ebooks in the sciences, engineering and health sciences are over-represented in the collection, while art lags behind all other subjects. This is an unfortunate but natural state of affairs, given the visual nature of art, the limitations of viewing devices and the complexities of rights management. However, this provides difficulties for institutions in need of a well-rounded ebook collection.

One possible work-around for this issue is for libraries to consider replacing lesser-used print books with subject equivalents, rather than title equivalents. Such a profile-based selection strategy may be challenging for libraries where selection and collection has been a predominantly title-based activity though it would certainly assist with maintaining collection size while reducing physical impacts. Direct replacement of all titles seems unachievable, given the current disparity in ebook availability among disciplines.

The introduction of e-preferred purchasing is the key first step in the Library's response to the strategic directions of the University and the needs of patrons.

## **Workflows – the new and the old**

The decision to implement an e-preferred strategy meant a drastic change to the book purchasing workflow. The primary workflow was very efficient and had reduced keying as the result of using embedded order data (EOD/EOCR), but the new workflow subsumed these efficiencies and added a level of manual complexity.

Requests to order titles in all formats are received from the Academic Library Services team, usually as the result of contact with academics and researchers, catalogues, promotional materials or collection analysis. Some selection requests are sent directly to Acquisitions but the greater proportion follows this integrated workflow.

Academic Library Services teams select a title that they would like to add to the collection and provide the details to the library assistants based at their campus. Campus library assistants mark up the titles on online vendor databases from Yankee Book Peddler and James Bennett. Advice is sent to Acquisitions, resulting in the Acquisitions library assistants accessing these vendor databases and placing the orders online.

An embedded order data (EOD/EOCR) file is created by the vendor system and sent to Acquisitions for loading. The file will contain a batch of MARC records that have been gathered as a result of the order; each record will contain specific 9XX fields that have been customised to contain order data. Once loaded to our library acquisition system (Voyager), the file simultaneously creates a purchase order and a bibliographic and holding record, so that it is immediately apparent on the Library Catalogue that the item has been ordered. Titles are invoiced after EDI files are received from the vendor and loaded into Voyager for processing by Acquisitions library assistants.

Individually purchased ebooks also follow this workflow as from an Acquisitions viewpoint there is little difference between individual print and electronic titles. Preferred sources for these individual titles are the ebook aggregators eBooks on Ebsco (formerly NetLibrary) and Ebook Library (EBL), but at this stage only EBL titles are purchased using this workflow. It is also possible for eBooks on Ebsco titles to be ordered in this way and this is currently being investigated as an additional option.

Under the pre-existing workflow, if a print title was marked up on the vendor interface then the print was ordered. If an ebook title was marked up, then library assistants would forward that selection to a library officer to order. The format ordered was dependent on which format was initially selected by the library assistant.

The pre-existing workflow is streamlined and involves little manual intervention; however, it is dependent on an ebook being available when the initial order is placed. The new workflow for the e-preferred process compensates for this by including a built-in maximum 90-day delay to allow for the publication of an ebook edition. Titles published before 2010 or required urgently are unaffected by the change to e-preferred. It has been decided to focus the e-preferred process on titles published 2010 and later because these are more likely to have a forthcoming e-version. The necessary urgency of titles ordered for reserve, reading lists or interlibrary loan is inviolate and so while an ebook will be purchased if immediately available, if it is only available in print then that is the format that will be acquired.

Campus library assistants now mark up the ebook version if it is available in the vendor database, and the Acquisitions library assistants have received additional training in how to order and setup the ebooks themselves, rather than forwarding on to a library officer to order. If campus staff locate only a print version, then that is what they select and the Acquisitions staff do additional searching once the order is passed to them. The additional searching involves checking the availability of alternate editions in the vendor database, then searching the Serials Solutions Knowledgebase. If definitely unavailable electronically, the print order will be held in a system of organised folders within the vendor database and two checks at six weekly intervals for e-editions will be made over a three month period. If an electronic edition does not become available during that time, the print will be ordered.

The two follow-up availability checks conducted by the Acquisitions library assistants again involve use of the Serials Solutions Knowledgebase and also Yankee Book Peddler's GOBI database. It was decided to use a combination of the two resources, as there is some difference in their coverage. GOBI holds up-to-date details for eBooks on EbscoHost and EBL titles, also some publisher-direct titles while the Serials Solution Knowledgebase contains details of the majority of aggregator and publisher-direct titles available in the marketplace. There have been occasions where an EBL or eBooks on EbscoHost title has not been found in Serials Solutions but is in GOBI, so it is felt that a check of both databases is warranted.

As the e-preferred workflow has been in place since May 2011, very limited data is available. Analysis of the proportion of ebooks to print books purchased after three months shows an increase with 32% of firm title monographs ordered as ebooks. However, much of the increase in ebook order numbers is due to initial additional searching in the knowledgebase rather than titles becoming available electronically during the three-month order holding period, with only 8.6% of held orders available as ebooks at the first six weekly check with a further 1.43% available at the second check.

## **Limitations & issues identified**

The existing book-purchasing workflow is very well designed for a print-preferred collection, but has constraints for any institution interested in purchasing electronic versions of a title, in preference to the print, without moving to an approval plan. The e-preferred workflow is complicated, time consuming, mouse-intensive and very manual. To move from such an integrated and smooth workflow to one which requires so much intervention and manual checking is less than ideal.

Reaction from clients and librarians to the new process has been mixed. Most are supportive of the aims of e-preferred workflow, although they have concerns about the delay in ordering titles. There has also been some negative feedback from staff and users who prefer print to electronic for a number of reasons including limitations on how ebooks can be accessed and used. The titles which are most affected by our implementation of an e-preferred process are those which have no apparent urgency attached to them. Urgent orders are processed immediately and not delayed in any respect. E-preferred affects titles that for the most part are being purchased to ensure the relevance of our collection. It is felt that as these non-urgent items are not required for a deadline there should be minimal negative feedback from academics and librarians within the University.

One of the biggest issues surrounding an e-preferred strategy is the variable lag time between publication of different formats. University of New South Wales (UNSW) implemented an e-preferred approval plan in 2010, and their experience indicated that, in a large number of cases, major publishers were not publishing an electronic version for 46-75% of print titles within 8 weeks of print release. Given that modern publishing methods can include the use of an electronic file to produce the print version, these numbers are surprising. While there are revenue reasons for such a delay, with more institutions than ever attempting to increase the proportion of electronic books in their collections, this appears to be a short-sighted strategy for publishers and one at odds with publishing trends.

Vendor support is available for unmediated digital acquisitions using approval plans, but there are no options available for mediated acquisition. It is a straightforward matter to place an order for a print title and receive the ebook, should it be currently available. Should an institution wish to place an order for the print and receive the ebook if it is published in a nominated time period, then you hit a wall.

Redesign of the book-purchasing workflow reinforced the importance of involving Acquisitions staff in workflow redesign. Some initial work was undertaken by the Acquisitions Coordinator, and then the Acquisitions team all sat together with a PC and projector to plot the best way to manage this potential maelstrom. Their ideas throughout the planning of this process helped to make it as workable as possible, and during the implementation, they formed informal groups to fine-tune it as problems or questions developed. The workflow is as straightforward as we can make it in order to meet all stated objectives, but it has led to one of the most complicated workflow diagrams encountered by anyone in the Acquisitions team!

The initial consternation experienced by the Acquisitions team was not based on the complicated nature of the workflow but rather on the potential effect on performance targets. The team exceeds its targets on a regular basis and takes legitimate pride in that achievement. The prospect of deliberately delaying orders was exceedingly offensive to team members, as they felt their efficiency would not be reflected in the longer turnaround times.

E-preferred is a mouse and keyboard-intensive workflow for Acquisitions staff and has had an occupational health and safety impact as a result. Staff have used a number of macros to reduce the impact of this large increase in mouse and keyboard use, but already one repetitive strain injury directly related to changed workflows has been reported.. Team members have been strongly encouraged to have WorkPace ergonomic monitoring software loaded on to their PCs to enforce breaks from repetitive tasks. Staff are frequently reminded to vary their work by changing tasks and positions, to assess their workstation setup, to immediately report discomfort and to do desk-based exercises. They need to take regular breaks throughout the day, as the manual nature of the process is a concern. Multiple handling of items, whether physically or virtually, is never ideal. The increased workload is primarily being experienced by library assistants, although of course bleeds through to other levels.

The initial training load was quite heavy, as the library assistants had not been involved with ebook ordering previously, and it took time for them to understand and become familiar with the process. The training was mostly conducted by the Acquisitions Support Librarian (Monographs), with support from the Acquisitions Librarian.

The process has required fine-tuning from a day-to-day standpoint and team members have frequently gathered informally to resolve issues as they have arisen.



## "Surely our book vendor can help?"

Yankee Book Peddler is one vendor that currently offers an e-preferred format option to academic libraries. The option is only available for approval plans and slips; there is no facility to manage mediated orders. Our other major supplier, James Bennett, has been contacted with a view to setting up a mediated e-preferred process, but they do not currently have facilities in place to offer this. An exhaustive search for a vendor able to offer mediated e-preferred has not been conducted as University of South Australia is part of the Australian Research Libraries Acquisitions Consortium (ARLAC) and has made a financial commitment to the two vendors that were awarded the contract.

Ideally, libraries should be able to identify a title that they would like to add to their collection and then place an order with the vendor. Some behind-the-scenes magic should then occur and an ebook or print book should be delivered in a suitable period of time, according to your format preference. The format preference should also include an option to delay the print order for a set period, in the hope of an e-version becoming available, then to ship the print once that period has passed. It is difficult to imagine how vendors could find an automated way to deliver this, given the problems experienced with print and ebook ISBNs, but from a Library point of view, that is the ideal situation.

Vendors are able to offer the services required for approval plans, so it is apparent that some of the groundwork has been done. Additional development needs to be undertaken to increase the flexibility of the workflow and make it applicable to a mediated e-preferred situation.

Some vendors have reservations about this type of process. They are concerned not only about the lag time between publication of print and electronic versions, but also what it will mean for libraries that want a specific title only to have it go out of print due to small print runs. There has been some success with obtaining out of print titles from overseas vendors such as Book Depository or Amazon, and as this process only affects titles published later than 2010, it is likely a copy could be found somewhere.

From a practical point of view, the majority of ebooks located through the e-preferred process have been purchased on aggregator platforms. In an ideal situation, the vendor should have access to a wide range of publisher-direct titles and details of these should be loaded on their online vendor databases. Generally speaking, the licenses signed directly with publishers are likely to provide generous access to the ebooks, including a reduced or zero-level of Digital Rights Management (DRM). Aggregator licenses are often far more restrictive, with much less generous copying and printing levels as a wide variety of publishers need to safeguard their content.

Whilst EOD ordering adapts well to the world of ebooks acquisitions, what is lacking is the equivalent of shelf-ready services for ebook firm ordering. Currently, after the order has been processed by the vendor, the title is activated on the ebooks platform and the vendor advises the URL of the ebook. Library staff 'receive' the ebook, activate the title on the knowledgebase and finally add the URL to the bibliographic or holdings record. Vendor shelf-ready services for print materials already provide complete metadata, ordering and receipt records. The equivalent of shelf-ready services for ebooks could be achieved through an embedded activation data records file. In this scenario, staff would load an activation file and 'receive' the ebook,

activate the title on the knowledgebase and update the bibliographic or holdings record with the URL.

Vendors need to investigate new and interesting ways to integrate ebook content into academic libraries. The take-up of ebooks in academic libraries has been huge and there is a hunger for more; however, a vendor needs to establish an e-preferred workflow that has far less impact than this one does on UniSA.

## **"Perhaps the system can deal with this?" Maybe**

It is a truism to state that today's integrated library systems do print acquisitions well, although they do not offer all the required functionality to truly support and streamline workflows for ebooks acquisitions. Some processes are often duplicated in ancillary systems. Content is activated in a knowledgebase to enable link resolution and discovery services, and added into the integrated library management system (ILMS). MARC record loads for new, changed and deleted content are uploaded to the ILMS and discovery services with licensing, usage, and authentication services again managed separately. In libraries, electronic resources work is typically done in three silos – the ILMS, the knowledgebase and an electronic resource management system. Data is managed in multiple systems, with all the attendant issues of lack of synchronization and duplication of highly repetitive mouse and keyboard tasks. Workarounds may also be needed in the integrated library system to deal with virtual rather than physical receiving.

Fortunately, just as the traditional library catalogue has recently been transformed into web scale discovery services, a number of integrated library systems vendors are now reconceptualising the integrated library system to a 'library services platform' model. This will be a single system to manage the entire lifecycle of all resources, whether print, electronic or digital with options for automating acquisitions workflows with minimal staff intervention required (Breeding, 2011). The vision for the next generation library system is to provide a set of services that will deliver efficient streamlined workflows that extend across material formats, while also catering for the differences between print and electronic. Instead of multiple data silos, there will be a single source or knowledgebase to manage all the data. This will provide a single context in which to work and a cohesive intelligent view of the entire collection. Separate systems for managing print and electronic have not proven successful nor scalable, and current "legacy library systems reinforce workflows no longer in step with library priorities" (Breeding, 2011).

Acquisitions functionalities will include flexible ordering and subscription services extensible to emerging purchasing models. Efficiencies will be made in electronic resource activation, licensing, and evaluation and usage analytics. Workflows will be based on vendor supplied EOD MARC record files which when loaded to the ILMS will create purchase orders, bibliographic and holdings records and promote efficiencies in ordering.

## **Conclusion**

Vendors and publishers offer a bewildering array of electronic book packages, collections and approval plans for ebooks. Each of these methods of acquisition has great value and merit for libraries and remains an excellent way to build a collection. It is vital that further options are investigated by vendors to provide support for e-preference in mediated selection and the acquisition of mobile and traditional

ebooks. Acquisition of digital materials in preference to print is already a reality in the journal domain and will become increasingly so for monographs. Greater flexibility in purchasing is essential.

E-preferred purchasing will continue to evolve at UniSA as efforts are made to streamline and revamp processes to attempt to reduce the manual handling impact on Acquisitions staff. It is hoped that development by book and systems vendors will at some stage remove the necessity for this workaround process. There is a genuine need for workflow support in this area and action by forward-thinking vendor partners is required.

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