

Charge: Open Ebook Collection for the Big Ten: Phase 2

August 2022; Approved 9/23/2022

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Worksheet	Minutes / Documentation	Outcomes / Next Steps
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Purpose			
SPONSOR GROUP	LEAD LIBRARIES AND PRESSES	PARTICIPATING PRESSES	PARTNERS
Joint group of BTAA press directors and collection development officers	University of Michigan University of Minnesota	Indiana University Northwestern Wisconsin Purdue Penn State Michigan State	Association of University Presses

The team will report to the BIG Collection Steering Committee, which, in turn, reports to the Big Ten University Library Directors. The team will also work closely with the Director of the Big Ten Academic Alliance Library Initiatives.

Background:

Successful creation of the BIG Collection will require a holistic stewardship of our collections at scale, that includes pursuing a robust [Open Scholarship Strategy](#). Creating this environment will take many forms, including opening the scholarly monograph.

Pursuant to that goal, the BTAA's Implementation Planning Team for the "Open Access Ebook Collection-Building Partnership" successfully drafted a [comprehensive, open access plan](#) to create a 100 title BTAA-based ebook collection. As [charged](#) by the BIG Collection Steering Committee in September 2021, this plan was developed collaboratively by librarians and university press staff from across the Big Ten. Their work included investigating and outlining the steps and infrastructure required to build and promote an open access BTAA-published backlist ebook collection. Their proposal, which was approved by the BIG Collection Steering Committee in June 2022, will include 100 titles, be completely open access, and will be focused on the Gender and Sexuality theme area.

The project is now moving into Phase II, pilot implementation.

Charge:

This team, based at the University of Michigan, is charged with:

- **Developing and branding the BTAA ebook collection:** an open access, 100-title ebook collection on the Fulcrum platform on the topic of Gender and Sexuality Studies.
- **Managing resources and requirements for development**
 - Project Budget: \$355,000
 - BTAA Ebook Collection Infrastructure Cost: \$100,000
 - Provided by the BIG Collection Steering Committee, this category covers:
 - Content conversion \$50,000 - There are costs associated with transforming a backlist collection (a mixture of print copies and born-digital PDFs) to a consistent EPUB3 format.
 - Platform costs \$50,000 -
 - Hosting: \$25,000 one-time payment for Fulcrum (\$250 per book) to host the pilot collection as a BTAA-branded entity.
 - Content Reuse: \$25,000 for Manifold to develop COUNTER 5 reporting and a bulk ingest tool for content and associated metadata.
 - Buy-Out to Open Content: \$200,000
 - The BTAA Collective Investment Program funded this cost of \$2000 per title. It reflects the costs incurred by presses in analyzing and clearing both author and third-party rights, cleaning metadata, and preparing backlist materials for ebook conversion.
 - Project Support & Reach: \$60,000
 - Provided by the Mellon Foundation to ensure successful administration and integration of this project. There are two components to this request:
 - Project Management staff: \$30,000.
 - Discovery \$25,000. This includes the external preparation of MARC records and payments of \$100 per title to both JSTOR and Muse.
 - Branding and marketing \$5000. This includes hiring a consultant to assist in creating a brand for this and future BTAA published collections.
- **Managing the project timeline and activities: October 2022 - June 2023**
 - Major milestones:
 - (October 2022 – February 2023): Copyright permissions analysis – securing the additional rights needed to publish open access online editions
 - (November 2022 – April 2023): Conversion/Scanning – Production of standard EPUB 3 files
 - (January 2023 – May 2023): Accessibility – Ensuring content meets accessibility standards

- (January 2023 – May 2023): Metadata – Create robust records to optimize discovery and address harmful or outdated terms in metadata by using more inclusive language in this new collection
- (May 2023 – June 2023): Dissemination through library systems – Ensuring the content is available through standard OA ebook platforms
- (June 2023): Preservation – Adding content to CLOCKSS and APTrust
- Manifold develops COUNTER 5 reporting and a bulk ingest tool for content and associated metadata.

Outcomes and Deliverables:

- A fully open access, BTAA branded, ebook collection in epub 3 format of 100 titles on the topic of Gender and Sexuality Studies.
 - Launched by June 2023.
 - Discoverable via JSTOR, Project Muse, and DOAB.
 - Working COUNTER statistics for each title and the collection.
 - Title level discovery in all of the 15 BTAA library discovery systems.
- Development improvements completed on Manifold:
 - COUNTER 5 reporting
 - A bulk ingest tool for content and associated metadata.
- A final report detailing the challenges and opportunities involved in building this collection that includes recommended next steps.

Key Partners (Peer Groups and related Pilots):

- BTAA University Press Directors
- BTAA Collection Development Officers and Electronic Resource Officers
- BTAA Catalogers
- BTAA Copyright Officers

Membership:

- **Project Sponsors:**
 - Kate McCready, VPO for Academy Owned Scholarly Publishing, BTAA
 - Charles Watkinson, AUL for Publishing and Director of the University of Michigan Press, University of Michigan
- **Collection Development Coordination:** This project will be coordinated at the University of Michigan Library by Jason Colman, Director of Michigan Publishing Services at the University of Michigan Library and led by project manager, Joan Kwaske Digital Publishing Coordinator, Michigan Publishing Services.
- **Manifold development.** The improvements to Manifold will be coordinated by Susan Doerr, Associate Director, University of Minnesota Press, and performed by Cast Iron Coding.
- **University press and library representatives:**
 - Indiana University - Gary Dunham, University Press Director

- Northwestern - Parneshia Jones, University Press Director
- Wisconsin - Dennis Lloyd, University Press Director
- Purdue University Press - Andrea Gapsch, Acquisitions Associate
- Penn State - Patrick Alexander, University Press Director
- Michigan State University Press - Kristine Blakeslee, Managing Editor

Resource Needs:

This project has been fully funded by the BTAA libraries and the Mellon Foundation.