

**CARLI One-Time Purchase Program**  
**Status Report**  
**3/14/08**

**Year One**

Sage Deep Backfiles were purchased at a cost of \$725,000, which created a shortfall of \$225,000. At this time 40 libraries have access to the product and we have recovered \$135,031, which is 60% of this shortfall, leaving us a balance of \$89,969 to break even on this purchase. It has been anticipated that at least two years would be required for us to see the maximum participation.

**Year Two**

In the fall the E-Resources Working Group began working on a list of 23 proposals, which included:

- ABC-CLIO E-books (EBSCO)
- Alexander Street Press products
- Black Studies Center (ProQuest)
- Digital Collections and Daily Life Online (Greenwood)
- Ebrary eBooks
- Elsevier eBooks
- Gale Virtual Reference Online
- Historical Chicago Tribune (ProQuest)
- Historical New York Times (ProQuest)
- Historical Statistics of the United States (Cambridge)
- The Nation Digital Archive (EBSCO)
- The National Review Archive (EBSCO)
- The New Republic Archive (EBSCO)
- Periodical Archive Online (ProQuest)
- Sage 2008 backfile titles
- Sage E-reference collection
- Saskia– additional 2,540 images to complete current collection
- Saskia – Bridgman Image collection – 13,064 images
- Scientific American Archive Online (EBSCO)
- Springer 2008 eBook Full Collection
- Springer 2005-2007 eBook Copyright Collection
- Springer Online Backfile Archive Collection

From this list the following titles were chosen for more in-depth review and consideration:

- ABC-CLIO E-Books
- Alexander Street Press Black Thought & Culture
- Alexander Street Press Women and Social Movements
- Black Studies Center
- Daily Life Online: Daily Life through History Premium (contain World Cultures Today), World Folklore & Folklife and Daily Life America
- EBSCO Magazine Archives – including The Scientific American Archive Online, The New Republic Archive; The National Review Archive and The Nation Digital Archive
- Gale Virtual Reference Online
- The Historical Chicago Tribune: 1849 – 1987
- The Historical New York Times: 1851 – 2004
- Sage E-reference collection

In looking at the possible products, the Working Group sought to select those that would have broad appeal, be of long-term value to the libraries and require low member contributions. With these principles in mind the following products were selected for purchase, pending Board approval and successful negotiations:

**Historical Statistics of the United States – Cambridge University Press**

Product information: This is the online version of the 5-volume print edition. The millennial edition was released in 2006. It is considered the definitive source of statistics for U.S. history and it is divided into 5 subject areas: population; work & welfare; economic structure & performance; economic sectors; and governance & international relations. Coverage ranges from 1800 to 2000, however some areas go back to 1610 or forward to 2002. The online version allows for the creation of graphs and users can create customized tables.

**E-Reference collection – Sage**

Product information: this is a collection of 62 reference texts published between 2003 and 2007. The volume count for the collection is 140 e-books. Most are social science titles with a few STM titles. Sage has a new interface introduced in 2007 and this will permit linking to the Premier and previously purchased backfile content. A copy of the collection titles list is attached.

**Women and Social Movements in the US (Scholar’s Edition) – Alexander Street Press**

Product information: a collection of primary documents, books, images, scholarly essays, book reviews, web site reviews and teaching tools focusing on women’s activism in public life. The Scholar’s Edition also incorporates Notable American Women: A Biographical Dictionary plus other data, statistics and publications.

**Black Thought & Culture – Alexander Street Press**

Product information: a collection of approximately 100,000 pages of primary source materials including non-fiction writings covering 250 years of history, including letters, speeches, prefatory essays, political leaflets, oral histories, interviews, periodicals and trial transcripts. Approximately 20% of the content is unpublished.

In addition, the group felt that the purchase program should allow CARLI to take bold and possibly experimental steps. There was great interest in the e-books proposals but it was felt that, with the exception of the Sage proposal, there were too many concerns about both content and pricing to move forward with any others. The Working Group, in conjunction with the Collections Working Group, plans to propose another e-book symposium for the fall. The purpose would be to survey the current e-book landscape and talk about content of greatest value to the CARLI libraries. We hope to create a content list, proactively engage the vendor community in crafting an offer that best meets our needs and to move forward with a large e-book purchase in the third year of the purchase program.

To assess the levels of interest in each of these products a survey was conducted of the membership. The survey did not include cost information and simply asked what products might be of interest for a partially subsidized purchase through CARLI. 60 libraries responded, representing 48% of the CARLI governing and associated membership. The survey results, by product, were:

Sage E-reference collection	37 libraries
Black Thought & Culture	29 libraries
Historical Statistics of the US	27 libraries
Women and Social Movements	23 libraries

Based on these survey responses we have developed the following pricing matrix and cost scenarios:

**Pricing Matrix:**

HSUS – Historical Statistics of the US  
Sage – E-reference collection

WASM – Women & Social Movements  
BT&C – Black Thought & Culture

Governing Members					Associate Members			
FTE	HSUS	WASM	Sage	BT&C	HSUS	WASM	Sage	BT&C
> 15K	\$2,000	\$5,000	\$2,000	\$5,000	\$4,000	\$7,000	\$4,000	\$7,000
7K – 15K	\$1,000	\$2,000	\$1,000	\$2,000	\$3,000	\$4,000	\$3,000	\$4,000
2K - 7K	\$ 800	\$1,200	\$ 800	\$1,200	\$ 950	\$1,450	\$ 950	\$1,450
< 2K	\$ 500	\$ 600	\$ 500	\$ 600	\$ 750	\$ 850	\$ 750	\$ 850

**Cost Scenario 1:** This includes all four products as well as maintenance costs for the Cambridge and Alexander Street Press products (the maintenance costs proposed by Sage do not begin for 5 years and are low enough to be managed outside of this program):

Product	Purchase Cost	Maintenance Costs	Total Purchase Costs	Projected Recovery
Historical Statistics of the US	\$135,000	\$18,000 one time	\$153,000	\$ 21,000
Women and Social Movements	\$175,000	\$40,000 for 10 years	\$215,000	\$ 37,000
Sage E-reference	\$172,000		\$172,000	\$ 33,850
Black Thought & Culture	\$175,000	\$40,000 for 10 years	\$215,000	\$ 42,700
TOTAL	\$657,000	\$98,000	\$755,000	\$134,550

Based on the Board allocation of \$500,000 we would see a shortfall of \$255,000. The projected recovery would account for 53% of this amount, leaving a balance of \$120,450.

**Cost Scenario 2:** This includes only the three products with the highest levels of interest:

Product	Purchase Cost	Maintenance Costs	Total Purchase Costs	Projected Recovery
Historical Statistics of the US	\$135,000	\$18,000 one time	\$153,000	\$21,000
Sage E-reference	\$172,000		\$172,000	\$33,850
Black Thought & Culture	\$175,000	\$40,000 for 10 years	\$215,000	\$42,700
TOTAL	\$482,000	\$58,000	\$540,000	\$97,550

Based on the Board allocation of \$500,000 we would see a shortfall of \$40,000. The projected recovery would more than cover this amount.