Brave New Library World: Lending e-readers and e-books in an Urban Academic Library

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Abstract

In Fall 2009, the Leonard Lief Library of Lehman College developed a pilot e-reader and e-book lending program, making Lehman the first campus within the City University of New York (CUNY) system to introduce these new services. The following article describes the project from a practical viewpoint, discussing e-reader and e-book vendor selection, user guides, training, lending logistics, and marketing, as well as unanticipated challenges.

Keywords: e-book, e-readers, academic library, lending, OverDrive, Sony Reader

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The Wild West of e-readers and e-books

When the Leonard Lief Library initiated its e-reader and e-book program in 2009, we anticipated the evolution of this environment, but we could not foresee the magnitude and rapid pace of change. In 2011 the Association of American Publishers stated, "E-books grew a dramatic +164.8 percent in December 2010 vs the previous year ($49.5M vs $18.7M)." A number of companies, such as Sony, Amazon, and Barnes & Noble, have introduced new products and revamped their existing lines of e-readers. The biggest technological development in mobile devices and e-readers was the release of Apple's iPad in spring 2010. As of February 2012, there are over 94 different e-readers available (E-Book readers, 2012). A recent Pew Internet study showed that the percentage of adults that own tablet computers or e-readers nearly doubled between mid-December 2011 and early January 2012 (Rainie, 2012).

Although e-reader popularity continues to grow, not everyone can afford these new devices, creating an opportunity for libraries to expand our public services. Some public libraries, such as River Forest Public Library, Illinois (2012) and Granby Library, Colorado (Grand County Library District, n.d.), are loaning e-readers. E-book lending models have been adopted by public libraries. Fifteen thousand libraries offer downloadable copyrighted e-content via OverDrive (2012a). E-books are "an ever-increasing staple in academic libraries, where 24/7 desktop delivery of content has become a standard user expectation" (Schell, 2010, p.75). Yet, academic libraries have been more cautious than public libraries in adopting e-book and e-reader models, with only a small group currently lending e-readers.

In this dynamic e-book and e-reader environment, questions arise. Are e-readers and e-books ideal for a scholarly environment? Should libraries wait until technology and content providers become more responsive to the academic market, or should they become early adopters and drive the market themselves? Based on a case study with e-readers and e-books at the Leonard Lief Library, this article provides guidance as other academic libraries address these same questions.

Project Background

In Fall 2009, e-readers were less common and more expensive than today, impacting our library's decision to purchase and provide them to our financially challenged student body. It is important for today's academic libraries to be key players in introducing new information technologies to their communities. As Dougherty (2010) reaffirms, "Librarians are in the forefront

of these advances in technology. They are not burying their heads in the sand wanting to go back to the 20th century" (p. 255). A significant part of the Leonard Lief Library's mission is to make our students successful life-long learners and support their learning needs in today's increasingly mobile environment.

Lehman College is part of City University of New York (CUNY), the nation's largest urban public university system serving more than 480,000 students at 23 colleges and institutions throughout New York City. Lehman is a four-year liberal arts commuter college located in the Bronx. The college currently offers 50 undergraduate majors and 40 graduate degree programs (Lehman College, 2012). In fall 2009, the college's Full-Time Equivalent (FTE) was 8,423, of which 7,078 were undergraduate students and 1,345 were graduate students (Lehman College, 2010). The average student age was 28. (Lehman College, 2010). The library plays a vital role in academic success as a student research center, a study area, and a technology hub, averaging over 2000 visitors per day. One aspect of the library's mission is to support "adopting innovative technologies that enhance research, teaching, and learning" (Leonard Lief Library, Lehman College, 2010).

We decided to divide the e-reader project into two phases. In the first phase, we researched and then purchased the necessary hardware to be used in conjunction with free e-book content publicly available online. During Phase Two, we supplemented free e-book content identified in Phase One with a subscription to OverDrive in order to increase access to e-book content within copyright.

Phase One: Purchasing the e-reader

Phase One of the Leonard Lief Library's e-reader pilot focused upon selecting and purchasing e-reader devices. This phase also included establishing internal lending procedures, internal staff training, as well as marketing of the devices. The primary goal of the experimental e-reader program was to provide undergraduate and graduate students with an opportunity to become familiar with the technology at no cost to them through the library. In addition, we wanted to loan out e-readers without preloaded content, allowing students to select the content that best fits their needs. Furthermore, we wanted to give students the option to use a Secure Digital (SD) memory card to load with their personal content.

Ten Sony Readers Touch Edition (PSR-600) were purchased with modest funding from the Leonard Lief Library's CUNY Textbook Initiative allocation. The $2 million CUNY Textbook

Initiative provided financial support for all CUNY libraries to acquire course-related electronic materials for students and faculty. The textbook "funds came with guidelines, encouraging college libraries to: put titles on reserves or make them available as 'reference materials;' purchase multiple copies as warranted; consider 'rental' options; consider 'e-textbooks;' " and more (City University of New York, 2010). These textbook funds were a part of a $10 million CUNY Student Financial Aid Initiative prepared by CUNY's Chancellor Matthew Goldstein and approved by the CUNY Board of Trustees in 2009 "to mitigate the effect of [a] tuition increase" on students (Goldstein, 2009).

At that time, the Sony Readers retailed for $350, which was beyond the majority of our students' financial means. Eighty-seven percent of Lehman's undergraduate students receive financial aid (U.S. Department of Education, Institute of Education Sciences, National Center for Education Statistics, n.d.). The Sony Reader was selected over Amazon's Kindle because of its ability to support the open e-book format, Electronic Publication (EPUB), and Adobe's Portable Document Format (PDF). With the Kindle, users are limited to buying e-books from Amazon.com, which solely uses Amazon's proprietary e-book format (Clark, 2009). EPUB is the preferred format for the Sony Readers since it is "reflowable," meaning it allows the text size to easily be changed according to one's preference and needs. EPUB is also the most commonly adopted [e-book] standard. (Delquié & Polanka, 2010).

Although the Sony Reader is not American Disability Act (ADA) compliant, we found it offers the best support for students with special needs because of its easy-to-use navigation buttons, and it supports the playback of MP3 audio files. Features like the built-in dictionary, note-taking capability, and text highlighting benefit all students, especially English as a Second Language (ESL) students.

After selecting the e-readers, we identified free e-book content to which we could direct students and faculty. We recommend the following websites:

- Google Books – http://books.google.com/,
- Project Gutenberg – http://www.gutenberg.org/,
- ePubBooks – http://www.epubbooks.com/,
- Feedbooks – http://www.feedbooks.com/,
- ManyBooks.net – http://manybooks.net/.

Google Books and Project Gutenberg provide the best access to e-book content in both EPUB and PDF formats. Further, both offer advanced search features on their websites, which

enable students to find the specific e-book they need.

In addition to these websites, the three public library systems in New York City – New York Public Library, Brooklyn Public Library, and Queens Borough Public Library – provide free downloadable e-content to their library patrons. To access content from any of these public library systems, one only needs to be a resident, or work, in New York State, and apply for a library card. Due to their vast collections, we frequently refer students to these local public libraries. As our financial resources are limited, the New York public libraries' established e-book collections enhance our own.

Next we provided training and created user guides on the e-reader devices. We created a Frequently Asked Questions (FAQ) (http://lehman.edu/library/documents/eReaderFAQ.pdf) handout, which explained what an e-reader is, offered information regarding the preferred download format, and explained why ebrary books could not be accessed on the Sony Reader. (One of the shortcomings of ebrary e-books at the time was that one must be connected to the Internet to access the text, and our e-readers do not have Wi-Fi Internet access.) The FAQ also provided URLs to the free downloadable e-book content sites mentioned above. We also created a Sony Readers user tutorial (http://lehman.edu/library/documents/eReader_Instructions.pdf), which included a labeled diagram of the e-reader and brief usage instructions.

Lastly, we conducted an e-reader training session for library faculty and staff. We showed MobileTechReview's (2009) Sony Reader Touch Edition PRS 600 Video Review from YouTube. The session concluded with hands-on training with the e-readers to enable librarians and staff to become well acquainted with these devices.

Developing lending procedures was complicated. As the first CUNY library to loan e-readers, the Leonard Lief Library had to create a lending model that supported our local program objectives. The lending policy issues we grappled with were mainly two-fold: security and loan period. As with most electronic devices and technology, our first and primary consideration was protection of the devices. They are expensive, fragile, and difficult to protect from damage or theft. After deliberation, we decided to utilize the same procedures we used for our in-house lending model for laptops. In our circulation system, the internal side of our online public catalog, we created a new item type, e-readers. The e-readers item type allows us to check out the devices like we would for a print book. We also created a user responsibility agreement, which students must sign at the time of the loan (http://lehman.edu/library/documents/loanagreement.pdf). Upon checkout, each e-reader is inspected by a circulation staff member to ensure the previous user has not altered the settings or damaged the device. We also

had each device registered with our local police precinct and stamped with a police emblem to deter theft.

After security concerns were addressed, we focused on the lending parameters. The ten readers were to be used by the estimated 2,000 patrons that enter the library on a daily basis. Since we had only ten readers and were uncertain how popular they would be, we wanted to make as many of them available as often as possible. For the purposes of the pilot, we began with a library-use-only, four-hour loan period, knowing we could modify the loan period according to usage statistics.

When planning any new library service, marketing is an integral part of the process. Although we did not have a marketing budget, we were able to publicize our e-reader program via several different channels as was done at Texas A&M University for their Kindle lending program (Clark, 2009). We incorporated e-reader promotion into the redesign of our library website and added an e-reader announcement in its news section. We also leveraged our social media accounts in Facebook and Twitter to announce the new program. Since not all patrons use these tools, we also announced this new service via college-wide student and faculty e-mail. Further, fliers and bookmarks were designed and placed in prominent, high-traffic areas of the library, including reference and circulation desks. Also, we introduced e-readers in our information literacy sessions. When developing a marketing campaign, it's essential to make sure library faculty and staff are familiar with e-readers and e-books. They are the front line in marketing to students and faculty. As mentioned, we provided hands-on training sessions where library faculty and staff practiced using the e-readers. We showcased the new e-readers during our Spring 2010 Collection Development event to further raise awareness among Lehman's faculty. Finally, we presented our new initiative at the Library Association of the City University of New York (LACUNY) Emerging Technologies Meeting (Jayadeva, Havelka, King, & Soto, 2010 April), 2010 Annual Nylink Conference (Jayadeva, Havelka, King, & Soto, 2010 June), and the Annual CUNY IT Conference in Winter 2010 (Arzola, Havelka, King, Soto, & Verbovetskaya, 2010).

Phase Two: Creating the Lehman eLibrary

In Fall 2010, we launched the Lehman eLibrary (http://lehman.lib.overdrive.com/) to students and faculty. The Lehman eLibrary offers the option to download and borrow e-books in EPUB and PDF formats. Students and faculty can borrow e-books and audiobooks for seven days and films for three days using their college Lightweight Directory Access Protocol (LDAP)

username and password. LDAP is "a set of protocols for accessing information directories" (LDAP, 2012), which is used at Lehman College to allow students, faculty, and staff access to the college printing and Wi-Fi systems, as well as remote access (off-campus) to the library's subscription e-journals and databases.

To develop our e-book library, we subscribed to OverDrive, one of the few e-content providers that allow the lending of downloadable e-books and support usage of various e-reader models. Overdrive is a "full-service digital distributor of eBooks, audiobooks, and other digital content" (OverDrive, 2012a).

As compared to public libraries, "the move towards downloadable e-books has practically been non-existent in academic libraries" (Shen, 2011, p. 182). Other academic e-book providers – ebrary, NetLibrary (now EBSCOhost eBook Collection), Ebook Library (EBL), as well as different publishers such as Springer, Science Direct, Project Muse, Oxford University Press, and Palgrave – were not suitable for our needs at the time. Access to these collections was only available via online computers. Our objective was to provide students with downloadable, lendable, mobile e-book content that they could take and use anywhere.

With a budget of approximately $4000, our e-collection was rather limited, consisting of 82 e-books, audiobooks, and videos. We concentrated on purchasing high in-demand books, popular books that frequently go missing, and new materials. Now our reference faculty can direct users to the e-book version of these titles (Buczynski, 2010). Although OverDrive offers some e-books with a multiple-user license, we purchased all books as a single-user model that allows one user at a time per e-book. In addition, we purchased MARC records for our online public access catalog. Most of our students find books via our online catalog, and "making them visible is what encourages library patrons to read them" (Bennet, 2011, p.227).

Prior to the Lehman eLibrary launch, OverDrive provided training sessions, which helped us understand different aspects of developing a downloadable e-book collection. All librarians were trained to use OverDrive's Content Reserve website (http://www.contentreserve.com/) to select content, and our collection-development librarian created e-book purchasing guidelines.

Once the e-collection was online, we needed to market Phase Two, the Lehman e-Library, to the college community. While we did not have the budget to establish a marketing plan, OverDrive does provide new clients with a $500 printing credit, plus support to design marketing materials. We co-designed three marketing items – bookmarks, smart notes (which provide brief instructions for using eLibrary), and posters – and displayed them throughout the library's high-traffic areas. We also recycled marketing techniques used in Phase One. Figure 1 is an example of one of our smart notes that we created to publicize the eLibrary. The smart note includes step-by-

step instructions for browsing Lehman's eLibrary collection, checking e-content out, and downloading onto your device.

Hands-on training sessions were provided for library faculty and staff, encouraging colleagues to borrow a device and experience e-books and e-readers firsthand. Additionally, a secured preloaded e-reader, and a promotional poster, were placed at the circulation desk, a high traffic area in the library.

Two Years Later, Looking Back

Implementing new library services often involves unforeseen challenges. Based on our experience Sony e-readers are not intuitive to use. We discovered that Sony Readers cannot be used while charging, have a short battery life, and slow response time. Also, we agree with Peter Svensson, a technology writer, for the Associated Press that "Many steps in the [downloading] process are poorly thought out and unfriendly to the user" (Svensson, 2011). Another issue affecting the academic environment is the inability to transfer notes and text annotations for future use. The biggest barrier we encountered was downloading content from Lehman eLibrary to the e-readers. This entails multiple software applications that need to be installed on a computer including: Sony Reader Edition, Adobe Digital Editions, and OverDrive Media Console.

E-readers, which are intended for individual consumers, "create many problems when it comes to using them in the library" (Kiriakova, Okamoto, Zubarev, & Gross, 2010, p. 24). Setting up an Adobe Digital ID to handle Digital Rights Management (DRM) was also a challenge. At the Leonard Lief Library, the Adobe Digital ID username must match the user's college LDAP username and Lehman e-mail account. The process, which each user must complete, was described by one student as "tedious" and took as long as forty-five minutes to complete a download

Figure 1: Front of smart note used to publicize the Lehman eLibrary

including creating an Adobe ID. This student also stated, "For anyone with limited computer skills; it would probably take longer." His overall opinion was that "the process is made to be personal, which quite frankly isn't convenient for a public use item" (undergraduate student, personal communication, December 7, 2010).

During the first two semesters of our pilot, fall 2009 and spring 2010, circulation statistics were unexpectedly low. The unloaded readers circulated a total of ten times during the pilot period. The circulation staff was encouraged to question users about their experience. Students were candid, revealing an issue with our lending policies. Our four-hour loan period was deemed too short, and users felt limited by this. We addressed the lending concern by increasing the loan period of the e-reader to a one-day, library use only loan. Our pilot was reassessed in summer 2010, and found that our loan statistics, unfortunately, did not increase. In an effort to increase our statistics, we pre-loaded the readers with ten public domain English literature titles from Project Gutenberg.

By the summer of 2011, we decided to allow the e-readers to be loaned externally for seven days. We selected the seven-day loan period to mirror our OverDrive e-book loans. However, the most significant aspect of this circulation policy change was allowing the e-readers to circulate outside of the library. This change was made only after Lehman's legal counsel reviewed the licensing and user agreements, because there has been conflicting information on whether e-readers can be loaned (Oder, 2009). We then repeated our marketing techniques, which included the campus-wide e-mail and new signage throughout the library. Students' response to the change was again negligible. In early September 2011, statistics rose to approximately thirty loans. We also faced collection-development challenges. OverDrive content focuses mainly on public library rather than academic titles. E-content from OverDrive is purchased at list price, yet perpetual access as well as digital preservation is a concern. E-textbooks, which are in high demand, have limited availability with OverDrive.

Our e-books statistics for OverDrive show that from September 2010 to December 2010 there were 127 item checkouts. For the year 2011 there were 260 item checkouts. In 2010 our collection included 129 items, which increased to 160 by summer 2011. As of 2012 our collection contains 254 items. With each day we are finding this technology to be more commonplace. Recent reference interviews have shown students are requesting more downloadable e-books. In the two years since the introduction of the e-reader and e-book initiative, many changes have occurred. Significantly more e-reader models are now available and prices have come down. The ever-increasing tablet market — with their color displays and multiple applications — is

surpassing e-readers in popularity. The smartphone and tablet market has brought about the development of e-book applications (apps) such as:

- OverDrive Media Console app (http://www.overdrive.com/software/omc/default.aspx)
- Kindle app (http://www.amazon.com/gp/feature.html?ie=UTF8&docId=1000493771)
- Nook app (http://www.barnesandnoble.com/u/free-nook-apps/379002321/)

In September 2011 Amazon and OverDrive joined forces to make Kindle-compatible e-books available on OverDrive (2011, September). Eighty percent of our e-book collection is now available to Kindle users. OverDrive is working on creating a WIN "Want It Now" Catalog (2011, October), which will allow patrons to "look at excerpts, purchase books from a retailer or request that their library purchase an e-book that wasn't being offered previously" (Associated Press, 2012).

The majority of academic publishers have already introduced, or are planning to introduce, different e-book options. In January 2011, JSTOR announced that e-books from major university presses will be available on the JSTOR platform (JSTOR, 2011). In July 2011, EBSCO purchased NetLibrary and released its EBSCO eBook Collection on EBSCOhost. In October 2011, Ebrary provided users with the "ability to download e-books onto multiple devices including the Kindle, iPad, iPhone, laptops and other devices" (Ebrary, 2011). EBSCO and Ebrary e-books are only downloadable as PDF files, which are unfortunately not optimized for e-readers. In January 2012, Apple announced its new iBooks textbook app for the iPad. Apple, in conjunction with Houghton Mifflin Harcourt, McGraw-Hill and Pearson, will provide e-textbooks with "fullscreen books, interactive 3D objects, diagrams, videos and photos" (Apple, 2012).

Future Plans

The e-reader and e-book project continues to develop. We have purchased two Nook Colors, two Pandigital Novels, and five iPads and plan to begin lending them in the near future. In spring 2012 we plan to develop a more in-depth e-reader and e-book website that will include video tutorials and hands-on guides for downloading books via different providers (OverDrive, Ebrary, and EBSCO eBook Collection). We will market both the e-reader lending program, as well as our Lehman eLibrary, to the college community utilizing social media and a new e-book and e-reader marketing video.

As previously mentioned we are aware of the importance of staff and library faculty training. In January 2012 we gave a hands-on Ebrary download training session specifically

for our newly acquired devices, but we also allowed faculty to reacquaint themselves with the Sony Readers. "We need to be able to be advisors of technology in addition to content" (Trott & Dunneback, 2011, p. 327), so we will continue to offer staff and library faculty training throughout 2012.

One of our leading goals is to assess the progress of this initiative. We will continue to collect statistics and quantitatively evaluate the program. In addition we plan to conduct surveys and student focus groups to obtain more qualitative information on the initiative. We also plan to explore the possibility of future cooperation with individual departments and courses.

Practical Tips

- Our strongest piece of advice is to collaborate. This is not a one-person or one-department project as others have noted (Behler & Lush, 2011; Cook, 2011). Collaboration should include information technology and should, ideally, include all library divisions.
- Keeping current on all trends in e-books and e-readers is crucial. The publishing industry and portable device technologies are changing rapidly. Since introducing our initial e-book collection, the types of supported devices have changed significantly. Initially, OverDrive did not support mobile devices, but now patrons can read on many of them.
- "Librarians should be aware how these smart phones are changing reading habits" (Rodzvilla, 2009). Reading relevant blogs, articles, etc. is essential to staying current. We recommend reading the blogs "No Shelf Required" by Sue Polanka (http://www.libraries. wright.edu/noshelfrequired/) and the "Librarian in Black" by Sarah Houghton (http:// librarianinblack.net/).
- Continued program reassessment is necessary. An inflexible program that does not adapt will not thrive because of the rapid rate of change.
- Marketing to both faculty and students is essential because acceptance varies. You will need to provide training, in addition to marketing and promoting your project. This needs to be a continuous effort.
- Familiarity with ADA compliance issues is important, as no e-reader model is fully ADA-compliant. Recently the U.S. Department of Education published a guide that clarified e-reader accessibility rules (http://www2.ed.gov/about/offices/list/ocr/docs/dcl-ebook-faq-201105.html).
- It's critical to read the fine print on both your hardware and software license agreements.

Also, you may want your legal counsel to review the documents. Some academic institutions lend preloaded e-readers, but licensing agreements typically advise against this.

Conclusion

As with any new program, one can always expect unanticipated challenges and opportunities. In our enthusiasm to loan e-readers and expose students to an up-and-coming technology, we did not foresee the difficulties of transferring e-books onto e-readers. In hindsight, it would have been helpful to learn more about this process in advance by researching potential software issues such as interoperability of Adobe Digital Editions and Sony Reader Software, Adobe ID management and LDAP password.

A second and more obvious challenge lies in the fact that e-reader technology is constantly evolving and can quickly become obsolete. When the technology becomes more affordable and easier to use – similar to downloading a song onto your iPod – will students be more willing to pursue this new technology? Currently, we are expanding our collection to include various types of readers including Nook Color, Pandigital, and iPad. Like most library patrons, Lehman students will most likely go with the brands they know. Students have expressed more interest in our impending iPad lending program than our e-reader program.

Overall, patron response to e-readers has been mixed. Some borrowers are hesitant to learn how to use these new devices, while other, more technologically savvy users enjoy the increased mobility that e-readers provide. The majority of our users are seeking more e-textbooks. Librarians and patrons alike are waiting for improvements from publishers regarding this issue. Ultimately, e-readers are eco-friendly, have the potential to save students money, and ideally make life more convenient.

Our students want e-textbooks. Library Reserves, which is responsible for hourly lending of required textbooks, receives the highest amount of traffic in our library. Once these devices can accommodate e-textbooks, then they will surely become more appealing to students. Also, with more color e-readers and tablets appearing on the market, art and science students may find them more useful.

Another serious issue is our rights as consumers. Do e-books with DRM work in an academic library? Presently, Adobe Digital ID is used to manage these rights, but this application makes it more challenging for users to download content. This model is not user-

friendly for academic libraries.

Academic librarians need to advocate for a better DRM system tailored to users' needs. Moreover, academic libraries should continue to advocate for rights in e-book lending issues for interlibrary loan and accessibility. OverDrive is currently testing open ePub and open PDF, which are DRM-free. OverDrive (2011, June) announced that O'Reilly Media's DRM-free e-book titles will be accessible via their interface.

The Chief Officers of State Library Agencies (COSLA) published an e-book feasibility study for public libraries (PinpointLogic, 2010). In its conclusion, this report summarizes important opportunities for public libraries. Other issues requiring attention are "research connections between library use and book buying; showing how public libraries support authors and publishers and feed an ecosystem of reading" and "eBook reader certification: testing and assessing eBook reading devices against usability and design guidelines for public library use" (PinpointLogic, 2010, p. 17). In response to this report OverDrive created a new service called Test Drive (Lichty, 2011), which, enables public libraries "to offer eBook devices for demonstration and lending" (OverDrive, 2012b). This program evaluates e-reader and tablets and provides recommendations on their use. All this is certainly a step in the right direction, but academic librarians need to become more actively engaged in e-book and e-reader issues. "E-books have been freed from the Pandora's box in the library world. We cannot stuff them back in and must figure out how to deal with the issues surrounding them" (Trott & Dunneback, 2011, p. 325).

The ultimate question facing urban academic libraries is: are we ready to provide our users with a fully functioning e-reader program? At present, there does not appear to be an academic lending model suitable to our specific needs such as e-textbook content, simplified downloading, and more flexible note-taking features. Since many urban public universities face limited budgets for technology and collection development, will projects such as the expanded use of e-readers and e-books be viable and sustainable? In the end, we found our introduction to e-readers and e-books at times risky, but a valuable investment for our library. We will continue with our project and monitor new advances in the e-reader and e-book world.

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