



Case Study

Wiley's Usage-Based Collection Management Model (UBCM)



Background

Academic libraries at Carnegie Mellon University, Iowa State University, and Northeastern University have recently used Evidence-Based Acquisition (EBA) programs, specifically Wiley's UBCM (Usage-Based Collection Management) model, to optimize their collections, manage budgets, and meet the diverse needs of their evolving campuses and communities. These case studies highlight the benefits and strategies behind adopting the UBCM model online book collections.

Carnegie Mellon University is a research university with programs in areas ranging from science, technology, and business to public policy, the humanities, and the arts. The university's library system is instrumental in meeting the academic and research requirements of its diverse scholarly community.

Iowa State University is a public research university that serves a broad student population and focuses on advancing the ideals of science, technology, and human creativity. Its library has a central role in supporting teaching, learning, and research across a wide range of disciplines.

Northeastern University is a global research university with multiple campuses and a strong emphasis on experiential learning. The library serves a diverse student body across a range of academic disciplines, with a particular focus on supporting its research in its global campuses.

Challenge

As academic libraries shift away from print books and towards digital resources, managing budgets, accessibility of resources, and breadth of subject disciplines have become a challenge. Online books usage has been on the rise over the past few years, particularly during the COVID-19 pandemic, which presented challenges related to budget constraints, an increase in the cost of online books compared to print formats, and an increase in administrative responsibilities at the library. At the same time, libraries needed to ensure that their collections met the diverse needs of their faculty and students across various disciplines.

At **Carnegie Mellon University** challenges included taking the collection-decision-making-burden off the liaison librarian, who was already consumed with their own responsibilities, and purchasing collections that had a variety of subject disciplines to fit into emerging curriculums.

At **Iowa State University** the challenge emerged during the pandemic as the library began to shift to digital-only resources, which significantly impacted the library's budget. The increased cost of online books and the popularity of the digital resources required the library to find a way to manage their budget without sacrificing critical resources.

Northeastern University faced a similar challenge as it expanded its library services to multiple campuses, creating a need for a diverse digital collection. The university needed a way to acquire a broad range of subject disciplines while maintaining fiscal responsibility.

The Solution

All three universities adopted Wiley's Usage-Based Collection Management Model (UBCM) as a strategic solution. Working with their account managers to address budget constraints and a shift to digital resources, these institutions utilized the Wiley UBCM program as part of their move to a more evidence-based acquisition (EBA) strategy. After implementing Wiley's UBCM at their universities, they noted enhanced discoverability for their online books, a wide breadth of subject discipline usage and an ease with interoperability with third party agents. UBCM offers libraries an upfront fee for access to a broad selection of titles via various collection types and collection category options, allowing them to assess usage at the end of their contract and purchase titles most relevant to their academic community. This approach removes the burden of predicting faculty and student needs and ensures that libraries stay within budgets by only paying for titles that are used.

Carnegie Mellon University cited the ease of managing titles by using a third-party agent report and integrating their electronic resources with a local library discovery service as a key benefit. Having a smaller electronic resource team, the automation and efficiency of these tools are crucial and make it easier to manage and discover resources, particularly by automatically tracking holdings. They also connected the low cost-per-use with the effective content discovery of the online books through Wiley's UBCM program. This discovery process is key to ensuring high usage of their online books resources.

Iowa State University noted similar success with discoverability, adding that contrary to traditional print book knowledge, new online books are being used immediately through the library's integrated local discovery systems. The metadata and integration of local discovery systems has increased usage for online books.

As **Northeastern University** mentioned the global campus expansion, the breadth of the online books collection and the subject disciplines helped their strategy of finding research that would work across multiple campuses and studies. When reviewing reports from Wiley's UBCM model, they mentioned the title usage is across the board in almost every discipline, which was a highly valuable story to tell as they look for budget increases yearly.

The Outcome

The year following the adoption of the UBCM program, Carnegie Mellon University, Iowa State University and Northeastern University, increased their online book usage by an average of over 78%*. The move towards adopting more evidence-based acquisition (EBA) strategies reflects a growing trend in academic libraries toward more data-driven, flexible models. By analyzing usage reports and cost-per-use data, these institutions could make informed decisions, control and manage their budgets, and ensure that their collections were aligned with user demand and program needs. By paying an upfront fee for these collections and enhancing the discoverability of these titles, at the end of each access period institutions can make a simpler data driven title selection process by usage reports, which then allows perpetual access to the titles selected. UBCM becomes more than a standard subscription, leveraging data driven insights to develop best-in-class collections for your users. With over 24,000 online books available and over 700 new titles added annually, the breadth of the subjects in the collection continues to meet growing researcher and institution needs.

- After adopting the UBCM in 2022, Iowa State University **increased their online book usage in 2023 over 21%*.**
- After adopting the UBCM in 2023, Northeastern University **increased their online book usage in 2024 over 165%*.**
- After adopting the UBCM in 2016, Carnegie Mellon University **increased their online book usage in 2017 by over 50%*.**
- In 2023 an average of **135 online book titles were selected** at the end of each institution's access period.
- In 2024, an average of **212 online book titles selected** at the end of each institution's access period* .

In each case, the libraries faced specific challenges related to budget, digital access, discoverability and maintaining a diverse portfolio for their patrons. However, through Wiley's UBCM program, libraries were able to meet the needs of their academic communities while maintaining fiscal responsibility.

***Data derived from Institutional COUNTER Report**

By the numbers

The UBCM full collection spans a breadth of disciplines including:



Agriculture



Business



Economics



Chemistry



Engineering



Psychology



Life Sciences



Earth &
Environmental
Sciences



Math &
Statistics



Medicine &
Nursing



Physical
Science



Veterinary
Science



Social &
Behavioral
Science

The UBCM full collection contains over **24,000** books with over **700** new titles added annually.

Wiley's custom usage report contains **8** fields of information for each institution to review their UBCM usage.

Over

53,000

book authors & editors
affiliated with over
9,000 institutions

Over

11,000

titles from the world's
top 10% research
universities

Over

900

award-winning online books
recognized by PROSE,
CHOICE, RUSA and Doody's

47

online books
have Nobel Prize
winning authors

52

authors are Wolf Laureates
in Agriculture, Chemistry,
Medicine and Physics

37

authors are Lasker
Award winners in Basic
& Clinical Sciences

Testimonials



Kimberly Dolan

Carnegie Mellon,
Head of Resource and
Discovery Services

“The main reason why I continue to renew UBCM is because I rely heavily on data to make decisions. EBA's ease the workload for our liaison librarians, allowing them to focus on other priorities rather than determining what faculty and students might need. This program opens up a big collection of resources and then we can use data to purchase what we need. ”

“UBCM is one of our larger EBAs....some of the others are more subject specific. It's easy to manage, it's easy to pick our titles at the end of the year, and it's working for our users as well because the titles are highly used. ”



Robin N Sinn

Iowa State University
Director, Collections &
Open Strategies

“Looking at what is my cost per use for ALL the books in the (UBCM) pool, even the ones I'm not going to buy... that really shows you how many students and faculty reading needs you are fulfilling with the money you are spending on these EBA program. It's more than the buying of permanent access at the end of the contract, it's that sustained access of the pool of books they can use and it's really useful. ”



Amy Lewontin

Northeastern University,
Collection Development
Librarian

“We had to return funds to the university and having UBCM was kind of an insurance policy for us, this was a lifesaver for us. We have packages with other publishers, but yours was the first experiment on a large scale. ”

“We were already in the o-book world but with the opening of other campuses, the strategy is to be able to offer a lot of different material, in a lot of different disciplines...once we had the funds, (UBCM) was something we really wanted to do. ”

“I didn't know the breadth of the Wiley (UBCM) collection until I started looking at the usage and that's a good story for us to tell because we have to make the case every year to get the budget increases. In terms of this collection, it's really successful. ”