
Course Materials for Uncertain Times

Balancing Purchase Formats in Multiple Learning Environments

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ABSTRACT Acquisitions and course reserves librarians have worked throughout the pandemic to provide course materials in a constantly changing learning environment. At the Candler School of Theology, student demand for online courses has increased, and in response, faculty have implemented more creative pedagogy. The library has, in turn, changed our service models throughout the past two years to continue promoting student success. This article offers a look into course reserve collecting policies from 2019 to 2022 to show how changes in instructional methods have impacted everything from staffing needs to collection development. We will then discuss how our decision-making around electronic resource purchasing has evolved and demonstrate how to update course reserve and collection development policies to serve a hybrid learning environment.

INTRODUCTION

Acquisitions and course reserves librarians worked throughout the pandemic to provide course materials in a constantly changing learning environment. At the Candler School of Theology, due to sudden campus space restrictions and student preferences, the demand for online courses has increased, and in response, faculty have implemented more creative pedagogy. The library has, in turn, changed our service models throughout the past two years to continue promoting student success.

We offer a look into course reserves collecting policies from 2019 to 2022 to show how changes in instructional methods due to the COVID-19 pandemic have impacted everything from staffing needs to collection development. We will then discuss how our decision-

making around electronic resource purchasing has evolved and demonstrate how to update course reserve and collection development policies to serve a hybrid learning environment.

FALL 2019

As of Fall 2019, a single librarian handed all acquisitions at Pitts Theology Library except for rare books and archival materials. This included managing all periodicals and electronic resources as well as conducting library assessments. To make this possible, 40 hours of student assistant work per week were allocated to the librarian in this position. Students assisted with receiving and processing new books and periodicals, preparing periodicals for binding, and cross-checking new orders against the catalog. At this point, Pitts Library did not have a separate budget line for e-books. The Acquisitions, Serials, and Assessment Librarian managed database and e-package subscriptions, but there was neither a budget line nor a clear process for making firm-order e-book purchases. Because the vast majority of courses taught at Candler School of Theology required in-person attendance, we rarely needed to make firm-order purchases of electronic monographs. As part of our collecting, we purchased a copy of every book assigned for a Candler course. Many of these books were already in our collection, so buying a relatively small number of additional titles each semester was a simple way to support our students and keep our collection up to date with current course offerings.

Similarly, a single librarian handled all course reserves materials for the Candler School of Theology, including para-curricular programs like the United Methodist Course of Study. In addition to course reserves, the Reserves and Circulation Specialist spent roughly half of their time in the circulation department. Course reserves operate cyclically, requiring full-time attention for the first few weeks of each semester, and scaling back as the semester progresses. Because of the cyclical nature of course reserves, there was not enough year-round work to maintain a student worker. With no dedicated course reserves student assistant, we often cross-trained circulation students to assist with processing book pulls, scanning excerpts, and taking down reserves at the end of the semester. Course reserves

were primarily print copies of full books available for short-term checkout at the circulation desk with supplementary scans of book excerpts and links to electronic databases available in the electronic reserves system.

SPRING 2020

In March 2020, Emory University closed the campus after extending the spring break recess an extra week. All courses shifted fully online, and no one was allowed on campus without prior authorization from administration. Librarians maintained basic patron services by staffing the building four hours per day and supervising two graduate student assistants. While the building remained closed to patrons, staff created an outdoor drop-box circulation system and expanded document delivery services to all students, faculty, and staff to support ongoing coursework and research. Because the shift to fully remote learning happened in the middle of the semester, the university encouraged us to do whatever we needed to do to make course materials available to students for the remainder of the semester. For Pitts, that meant working with faculty to determine what books were needed and purchasing all of them as e-books whenever possible. We pushed the copyright limits on scanning for course reserves, but we had university funds to devote to licensing permissions for this extraordinary amount of scanned material.

2020-2021 ACADEMIC YEAR

With the pandemic in full swing, courses at Candler and most of Emory were fully online for the entire 2020-21 academic year. To support fully online courses, Access Services maintained our focus on e-books, online resources, and scanning. While the library space was open by reservation to current students, faculty, and staff, we did not offer physical course reserves or stacks access. Instead, we maintained intensive scanning and book request/retrieval services for all Emory community members. This shift led to a marked decrease in circulation services, giving us the opportunity to retrain our student staff to do scanning. Unlike Spring 2020, we were able to prepare for an academic year of fully online courses and could devote more intentional funding to e-books for course reserves.

FALL 2021

As students, faculty, and staff returned to campus for the Fall 2021 semester, the library stacks reopened, circulation services resumed as usual, and physical course reserves returned to their place on the shelves behind the circulation desk. This was the first semester that Candler offered courses in such a wide variety of formats, including fully online, fully in-person, hybrid, and hy-flex. At Candler, hybrid courses meet fully in-person for some sessions and meet remotely for the others, whereas hy-flex courses meet synchronously with some students always attending in-person and others always attending remotely. Because of our extensive electronic resource purchasing in the previous year, course reserves were populated with a huge number of e-books, scanned excerpts, and links to electronic databases of other resources. However, many of the materials faculty needed for their courses were not yet available as e-books, so we continued to scan and license permissions for book excerpts, which proved a financially unsustainable long-term solution for the university.

SPRING 2022

Due to a COVID variant outbreak over the winter recess, Emory postponed the Spring 2022 return to campus until January 31, 2022, shifting all courses online until that date. Candler's entire January-term session fell during that time, as well as the first few weeks of the regular spring semester, meaning the library now had to support fully online J-term courses with no lead time to prepare. Like Spring 2020, we attempted to purchase all the required texts as e-books, but this time with little success because very few of the texts had library e-book licenses available. Unfortunately, the lack of e-book options forced us to license more excerpt permissions for reserves use. However, the library remained open during the remote courses, so anything we were not able to license or purchase as an e-book, we could make available on physical reserves. For the regular semester, we scanned required readings for the initial remote period of the semester, but we did not attempt to buy e-book copies of all the texts since students would be back in person for the rest of the semester.

SUMMER 2022 AND ONGOING

Now that things have mostly settled, our students have returned to their primary duties in acquisitions and circulation, no longer spending most of their time handling e-resources. We used this rollercoaster time to formally adopt some collecting policies around course reserves, particularly around e-resources, and incorporated those into our long-term collection development plans. Throughout the pandemic, we experienced our first foray into providing course materials for fully remote courses and students, explored multiple new modes of course delivery, discovered the limits of copyright permissions purchasing and shifted student workers to entirely new duties. We have used these challenges as learning opportunities and have thus been able to inform ongoing discussions with administration and faculty about the library's role in online learning.

SPENDING AND ELECTRONIC RESERVES

When the university campus closure in Spring 2020 required us to pivot to purchasing e-books for course reserves, we immediately increased course reserves spending by 690% compared to Fall 2019. We had already added the textbooks for that semester to the print collection, but we now needed to buy everything possible in an electronic format as well. Since the shutdown occurred relatively late in the semester, we worked with faculty to determine which texts were most needed for the remainder of their courses. Between e-book licensing limitations and faculty whittling down their book lists, our huge spending increase only covered about 13% of the total books assigned for that semester. During the fall semester, we had more of an opportunity to work with faculty to assign books that were available electronically. As a result, our spending rose even higher with a 780% increase between Fall 2019 and Fall 2020. That became our peak for course reserves spending during the pandemic, as many of the textbooks needed for Spring 2021 had already been purchased during Spring 2020 and spending decreased accordingly. The following academic year, a partial return to campus allowed us to have physical course reserves again, but we still needed to support many online classes at the same time. At this point, our spending was declining, but it remained 70% higher than an average semester prior to the pandemic. With the permanent addition of hybrid degree pro-

grams, we anticipate this increase to be permanent as well and do not expect spending to return to pre-pandemic levels.

The increase in e-book purchasing for online and hybrid courses is part of a larger trend towards electronic course reserves that has been taking place over the past several years. In 2016, only 60% of courses at Candler School of Theology were using electronic reserves. Instead, they relied primarily on physical reserve texts. However, by the 2020-2021 academic year, 95% of Candler courses were using electronic reserves. This includes not only e-books, but also scans of articles and chapters that professors assigned for classes. Electronic reserves represent not only a huge increase in the cost of buying course reserve materials, but also a massive increase in the amount of work it takes to make materials available. Library staff must scan pages of book chapters to upload, while making sure that the portions are within copyright limitations. E-books don't require physical processing, but do require special cataloging, ongoing maintenance of proxy and sign-on systems, and additional reference support to ensure patrons can successfully access the e-books. Additionally, the Course Reserves Specialist must upload these items into the reserves system and Course Management System and field questions from faculty and students about the electronic content. Overall, although the implementation of electronic course reserves is popular and can be easier for many patrons than retrieving physical items from the library, it requires an enormous amount of work from staff across the library that cannot be overlooked.

STAFFING NEEDS

To best serve our purpose as an organization, we generally match our staffing to our mission statement, part of which is “to acquire, organize, preserve, interpret, and provide access to information resources.” Under normal operating conditions, staff work in all of those areas, fulfilling our obligations to our patrons and the broader academic and theological community. Once the building physically closed, we redistributed our staffing to meet the urgent needs of our community, most notably acquiring and providing access to materials. Even departments not traditionally associated with access and acquisitions as such shifted their responsibilities to include one or both things. Access Services shifted traditional, in-person services to contactless circulation services and scanning for course reserves and

document delivery services, staffing the building, and supervising two graduate student workers. Cataloging provided critical support during this entire process, despite the explosion of e-book records to process, which was something with little precedent at Pitts. Reference librarians fielded countless questions about accessing electronic resources remotely and requesting items to be scanned or pulled for contactless circulation. Acquisitions temporarily suspended print orders due to a lack of staffing to process the incoming materials, focusing instead on electronic resources. At this point, we also decided to permanently include e-books in our acquisitions planning, indicating a major shift in our collection development. Of course, other projects in other areas of the library continued, but staff largely focused on the immediate needs of the Candler community for resource access. As the library reopened fully in Fall 2021, staff returned to their original jobs in other areas of the library, and Access Services scaled back our services, though not to our pre-pandemic levels so far.

COLLECTION DEVELOPMENT

As we've worked through the pandemic and the various stages of distance education, our collection development policies and practices have developed to support a community of patrons with a higher need for e-book access. To support the purchase of electronic course reserves, we established a designated e-book budget line. This budget includes both course reserve and other monograph e-book purchases, but we have set policies around it to ensure that e-book spending fits within our larger acquisitions budget. During campus shutdowns, e-book purchases that duplicated our print holdings accounted for 85 percent of e-book spending. This was necessary at the time because students were not permitted to come to the library to use our physical collections. However, since those restrictions were lifted, we have worked to limit duplicate purchasing to better stretch our collection budget.

With the move into significant e-book purchasing for the first time in our library's history, we also needed to set policies around our e-book licensing. Although it was tempting to simply buy everything available during those early days of the pandemic, we knew that it was important to pay attention to usability for our patrons as well as cost and availability. Years of library surveys, reference interactions, and help tickets have taught us that for many patrons, e-books cause

deep frustration. They will use an e-book successfully one day but be turned away the next. Some e-books can be downloaded as PDFs, but others can't, and it's difficult for patrons to tell which is which. They will learn how to use one platform successfully, but then realize that they need to access items on many different platforms to successfully complete their research. While libraries can't solve all of these issues, we made a point of mitigating them as much as possible. To minimize turn-aways, we only purchase e-books with an unlimited user license. To assist with download issues, we purchase DRM-free licenses wherever possible. And to minimize user confusion, we prioritize platforms that have consistently gotten positive feedback from our patrons. The unfortunate reality is that each of these policies causes e-books to cost more than they would otherwise. However, our perspective is that it's more important for the e-books we buy to get a lot of use and to effectively meet the needs of patrons than to have a greater number of e-books that don't get used and contribute to student burnout and library fatigue.

In addition to setting internal policies for e-book purchasing, we also needed to educate our patrons about e-books. Because course reserves are so closely tied to faculty syllabi, it's important to clearly communicate the limitations and parameters under which we can buy e-books. This spring, librarians from Pitts presented at a faculty meeting to explain the different ways the library can support digital learning. A Reference Librarian taught about how scholars can manage their online presence using tools like ORCID, the Digital Scholarship Librarian provided examples of how to incorporate digital projects into classroom teaching, and the Acquisitions Librarian explained some of the limits of electronic resource purchasing. To accomplish this, we provided examples of e-books with different licenses and explained how the publisher limitations impact what the library can provide. We showed a book that is available for purchase electronically on Amazon Kindle but is not available for libraries. We also showed the dramatic price difference between a library e-book and a print book, and examples of e-books that are exclusive to expensive database packages. Presenting these parameters helped explain why our collection development policies around purchasing e-books were in place and framed faculty as our allies in our ongoing efforts to get students access to course reserves. Several faculty members expressed gratitude for our presentation and have been proactive in working with us to make resources more available for

their students. In one scenario, a faculty member was so committed to making her book available electronically through the library that she went to her publisher and worked with them to expand the license on the book to an unlimited user license. The publisher agreed to make the e-book available for purchase with an unlimited license, and we were able to purchase the e-book for her class to use.

As part of a large research university, it's important that Pitts coordinate our collections with the other five libraries on campus. We've always worked with the other libraries to divide up relevant collecting areas, but the shift to digital learning during the pandemic made it even more important to closely examine which resources were being licensed and how they would be managed. Throughout this time, professors were experimenting with different teaching techniques and working to diversify the formats of resources needed for their classes. Many professors wanted to use streaming videos in their courses but obtaining streaming rights can be extremely difficult. For these requests, we relied on the licensing coordinator at the Woodruff library at Emory to negotiate licenses that could work for online courses. Additionally, we needed to coordinate the scope of databases that we licensed. Some online databases at Emory are only licensed for users in a specific graduate school due to their high cost per user. We try to license resources for the entire campus as much as possible but must stay aware of budget limitations and balance that with the overall needs of our patrons. There is not a single simple solution, but being intentional about keeping lines of communication open between libraries has allowed us to work across the university to make as many online resources available as possible.

MOVING FORWARD

In January of 2022, Emory University announced that it would start the semester remotely due to a surge in COVID-19 cases. Library staff returned from the holiday break on the same day as the semester started, providing little to no lead time to prepare resources. Additionally, the first week of the semester was Candler's January term, which is an abbreviated academic term of intensive courses. With January term classes starting the same day library staff returned to work and lasting for less than a week, even e-book purchases wouldn't be available quickly enough for these students to use them for class. The challenge was further compounded by the types of ma-

terials that are typically assigned for January term courses. Many of these materials, as well as materials for comparable summer and August term courses, are on niche topics, from small publishers, or are mass-market popular works. The nature of this content is such that it is far less likely to be available for libraries to purchase as e-books than standard academic works. Because of these limitations, we were largely unsuccessful in providing course reserve e-books for students during this period. However, this provided us with an opportunity to demonstrate how our new policies for collecting worked and further highlighted the enormous amount of advance work required to make online learning successful.

As we've moved into an era of hybrid learning, we've been faced with equivalent staff in reserves and acquisitions with many additional responsibilities. As described previously, electronic reserves require a lot of extra work, and maintaining robust collections of both print and electronic reserves each semester is no small feat. To help manage this, our student staff roles have shifted. Now, acquisitions students assist in checking proxy access for newly purchased e-books, and there is a designated course reserves student to assist with scanning book chapters. In addition to more help from student assistants, we have been intentional about setting accurate expectations regarding course reserves at the library. We have created consistent policies for purchasing course materials based on the delivery of the course. Since hybrid courses require some in-person attendance, we consider them in-person courses for the purposes of reserves, acquisitions, and placement on physical reserve. For fully online courses, we purchase as many things electronically as possible. Hy-flex courses are treated as fully online courses because some portion of the students enrolled are remote and may not be able to travel to access materials on campus. We have continued to communicate with faculty about how the course reserves process works so that they can try to assign texts that we can easily make available for them. We have also worked with the admissions department to make sure that incoming students are fully aware of what the library can provide for the upcoming classes. It's important for both scholarship and personal budgeting that students arrive at the school with an accurate understanding of what books they will and will not be responsible for purchasing. Finally, we have worked on rolling back policies put in place early in the pandemic that are no longer sustainable long term. We no longer offer request and re-

trieval services, for example, and we have limited scanning to only those items necessary for course reserves.

ONGOING QUESTIONS

We were successfully able to provide course reserves resources to our students throughout the pandemic due to a combination of quick action, devoted staff, expanded budgets, and collaborative faculty. However, there are still outstanding questions to which we do not have answers. What would we have done if staff were not permitted in the library space to access physical books and scanners? If an e-book isn't available and we can't license a scan, is it possible to get students access to the book electronically at all? How can we find creative ways to keep expanding student access to course materials? As we continue to work in an evolving hybrid educational landscape, we will continue to think through these questions and expect to encounter many more. Through uncertainty, it is important for us to look back on times like this when we needed to use every tool at our disposal to keep maintaining the mission of our library. By using past experiences to inform our practices, we can continue exploring creative ways to help theology students succeed.