

PDA DDA It's all AOK!?

Let's review how librarians, publishers, vendors and our users can work together to extend our collection services

CARLI Forum on PDA: June 2, I Hotel
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Introduction



- Setting the stage for a great day full of information about Patron Driven aka Demand Driven acquisitions
- Few notable quotes designed to get you thinking
- Then review Why is it such a hot trending topic
- Overview of what it is in general and how it works
- New initiatives in PDA land and
- Issues to think about



Quotes

- ACRL on hot trends in libraries
- Rick Anderson on just in time purchasing
- William Walters on role of library selectors
- Nancy Gibbs on changing role of selectors
- Stephen Bosch: users want networked content
- Thatcher and Esposito Publishers

Controversy! Brought about perfect storm of debate around so many topics dear to libraries

Raises questions about:

- Librarians' role in collecting
- User expectations today
- Publishers' market
- EBook availability
- Value of Print Collections
- Local vs networked collections



What is PDA's impact?

- Is it a Terrific Service or the end of library collecting
- Will users pick books that will endure if librarian can control what is offered
- Will it save money and increase access or mean run away costs
- Or will it erode preservation and mean more homogenous collections
- Will publishers be hurt and book publishing suffer or will this encourage higher eBook prices
- Can we look to the Mission and Strategic plans of our institutions and see this as an opportunity a new tool to meet our goals as a library, to further Higher Ed and to enhance the access we all enjoy as a part of CARLI

Scan of environment

- Budget Crisis: PCG (Publishers Communication Group) and the National Center for Education Statistics note decline
- Serial crisis: ARL recurring expenditures overall comprise 70% total budget with at most 20% spent on books
- Webscale discovery and mobile: Students on the Go =online and networked and not necessarily pdf
- Circulation Low, Shelving space in libraries is at a premium
- Ebooks sales: Publishers Weekly March 2014 noted: Amazon command market for 41% new books sold and 65% of all online books sold but libraries can't get that content
- Collection or resource management is the norm not necessarily collection building
- Equals a lot of interest in PDA solutions

What IS Patron Driven or Demand Driven Acquisitions

- Terms are used interchangeably though more now see Demand Driven as eBooks only and that can also cover more leased options rather than a simple purchase model
- Many would say patron driven acquisitions was always a part of collection development in libraries
- Really took off as a term with ILL studies that showed how PDA was better approach than borrowing a book
- Print book PDA services followed
- Once eBooks grew in volume and vendors working with publishers, provided the new service options to select titles for a demand driven purchases, the DDA services really took hold.

How does it work

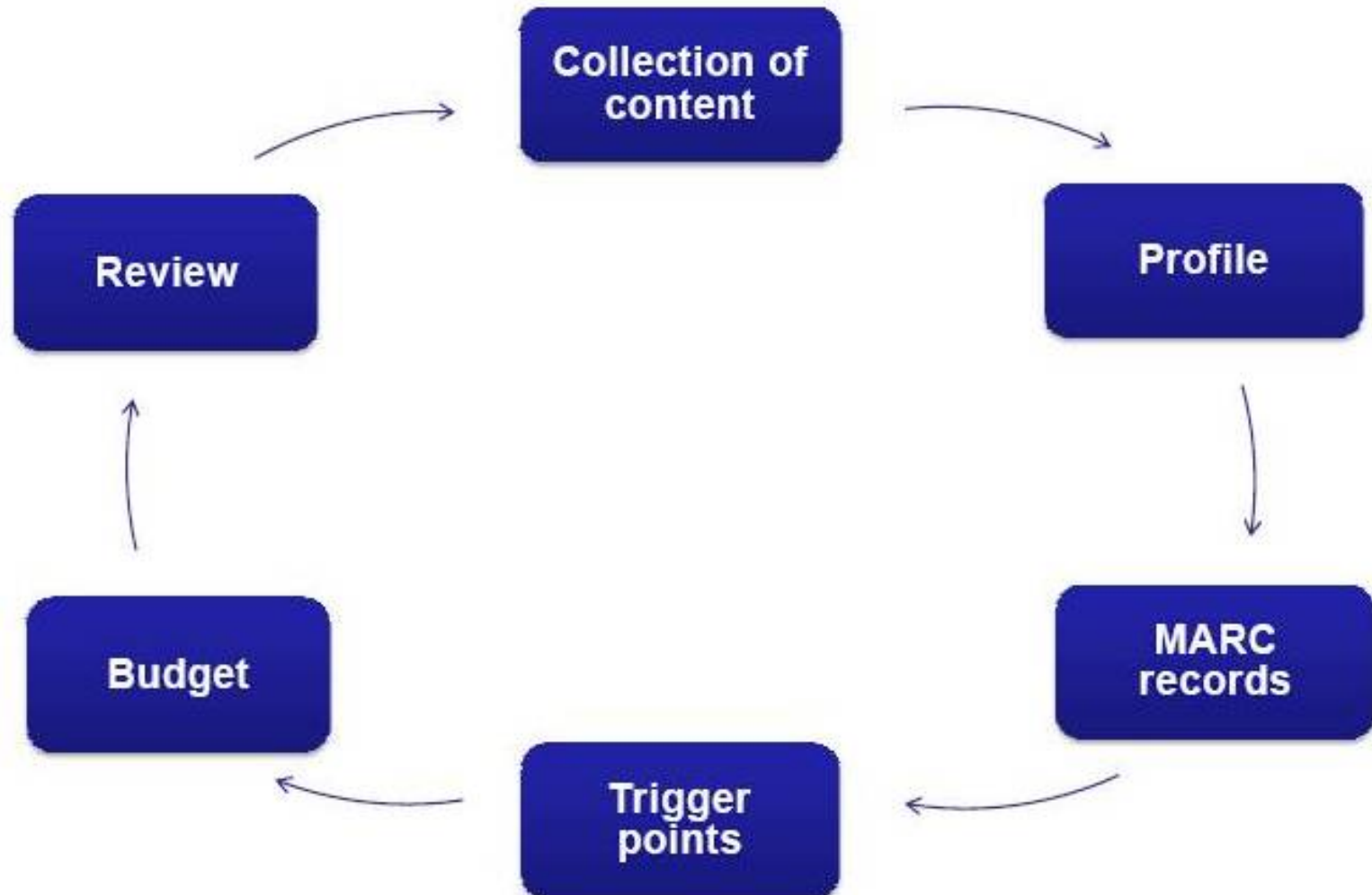
- ILL model: simple mediated purchase w/ local purchase criteria including price caps and availability and readership level : the ILL staff buy from any vendor that has it available and for set price
- Controlled collection management where the user “buys”:
 - librarians pick the pool of titles that users could potentially request. The format could be a print book in stock or an eBook
 - The pool the vendor offers may include all the book content that could be loaded
 - or just a selection using price, copyright year, publisher and or subject to narrow selections down
 - or just newly published based on a profile set up by a vendor
 - Or a combination of these
- MARC records are loaded into the local catalog (with field identifiers and with proxy information for remote access)

How does it work cont'd

- Then depending on format and or the vendor: a user can “request” the purchase of a print book (which is rush ordered from vendor or even Amazon or local book store and usually processed for user delivery or pick up) and then circulated
- or the user seamlessly accesses an eBook on a vendor platform. That title may be automatically purchased by the Library depending on how much content is accessed by that patron or any subsequent ones as agreed to by the library with the terms set by the vendor
- Or the use may incur an access fee as the library utilizes a lease or short loan option rather than a purchase which is often a % of the title list price
- Or the short loan option may result in a purchase based on number of loans or number of users or even cumulative hours of use
- Publishers decide on the conditions and options to sell their content and utilize many vendors
- Vendors offer the service framework, access platforms and do all the marketing, sales and administrative infrastructure for the services

What is Patron Driven Acquisition?

PDA, Demand Driven, User Driven



Some Terms to know

- Trigger: can include set amount of page views, page prints or downloads that result in purchase : publishers decide what can be sold
- STLS: Short term loans: user by accessing a title enables a short loan that will allow for wide access to content for a small fee. Fees had been 10-15% with a few at 20% of a list price. If a library purchases after XX loans, they pay the STLS fee per loan and the full list price: publishers decide what to offer as STLS and set the title fees
- Profile: mechanism library uses to narrow pool of new content
- Platform: Vendor hosted, vendor sets discovery/ access rules: local version
- Users accounts: may be needed for downloads
- DRMS: Digital Rights Management: Vendors attract publishers who support these as the later are worried about users sharing content
 - The vendor offers options, the publisher utilizes them but they impede access
 - Projected Spend amount: Can set up deposit accounts or projected spends with vendor to be sure can slow down access before max is reached
- Annual access fees required for hosted content or to begin pilot



Case studies

- Purdue ILL:
- Grand Rapids EBL
- University of Iowa ebrary
- CARLI
- UIUC

Vendors offering Book DDA

- Vendors



- Many publishers do as well: DeGruyter example, many others

PDA Issues

- Availability: RUSH stock for print or eBook limits of availability
 - Publishers do not offer PDA options for all their titles access
 - Embargos are employed for the new content as far as online access
 - Much of the Popular content can not be purchased by a Library for fear this access will erode sale
 - Images not there or poor quality
 - Multi user options fewer, most are single user only
 - Publishers can pull content from the Vendor collection
 - And they can change their fees.....
- Most all eBooks available are under DRMS that impede access even when bought
- Record selection : Some vendors MARC records are inaccurate though this is improving somewhat due to library demand, the inaccuracies make record selection hard and discoverability a problem

Issues cont'd

- Duplication: how to avoid duplicating other formats?
- If Vendor folds: what does perpetual access mean
- Who uses them most and is discovery local or on platform
- Are Statistics on use available: COUNTER compliant?
- Do the thresholds set for triggers accurately define use
- How do libraries best manage the Costs and projections
- For Print the shipping costs can add up
- ILL not possible for PDA eBooks though also getting more attention
- PDF dominates academic content but users have devices and they want a digital copy easy to read

NISO Best Practices: Demand-Driven Acquisition (DDA) of Monographs

<http://www.niso.org/workrooms/dda/>

- Best practices for populating and managing the pool of titles under consideration for potential purchase, including methods for automated updating and removal of discovery records;
- Development of consistent models for the three basic aspects of e-book DDA -- free discovery to prevent inadvertent transactions, temporary lease, and purchase -- that work for publishers and libraries;
- Methods for managing DDA of multiple formats; and
- Ways in which print-on-demand (POD) solutions can be linked to DDA.

Demand Driven Acquisition of Monographs Summary of Survey Results

http://www.niso.org/apps/group_public/download.php/12541/DDA_Survey_Results.pdf

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Publishers Price-Gouge Libraries, Libraries Respond by Cutting Back on the Service

May 28th, 2014 by [Nate Hoffelder](#) · [2 Comments](#) · [library ebooks](#)

In the consumer ebook market Amazon is a villain that tries to keep prices down, but there is no similar villain in library ebooks. As the major trade publishers have shown us time and again, publishers can jack up prices or otherwise limit services in order to try to get more revenue from libraries.



There isn't much that libraries can do about it, but sometimes they do cancel contracts or otherwise walk away from a service which has grown to expensive. The Boston Library Consortium was recently the victim of [a surprise price hike](#):

This month the BLC was surprised to learn that a number of the publishers in this program planned immediate, significant, and unexplained increases in price. Even worse, the new pricing goes into effect at a time when library



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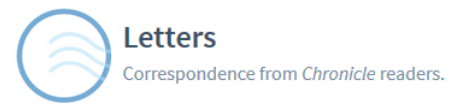
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May 27, 2014

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Ebook Pricing Hikes Amount to Price-Gouging

To the Editor:

Since about 2010, the electronic book, or ebook, has rapidly increased its market share in the publishing business, and in 2013 it accounted for 27 percent of adult trade-book sales. Academic audiences have been somewhat slower to adopt this format, but as the general market for ebooks has begun to plateau, the academic market has been picking up. Now—and probably not coincidentally—academic libraries find themselves facing sharply increased pricing for commercially published electronic books.

Like many library consortia, the Boston Library Consortium offers an ebook program to its members. Nine of the BLC libraries—Boston College, Boston University, Brandeis University, Northeastern University, Tufts University, University of Connecticut, University of Massachusetts at Boston, University of Massachusetts at Dartmouth, and University of New Hampshire—participate in the program, which includes commercial publishers such as Wiley and Taylor & Francis, as well as a number of university presses. In the BLC program, publishers charge libraries for ebooks based on a model that combines payment for short-term use of a title by a student or researcher with the purchase of the title after a few short-term uses. In this way, libraries pay full price for an ebook that meets the needs of multiple readers, and pay a fractional price for ebooks that are of use to only one or two people. This month the BLC was surprised to learn that a number of the publishers in this program planned immediate, significant, and unexplained increases in price. Even worse, the new pricing goes into effect at a time when library budgets are already committed for the 2015 fiscal year.

These newly announced price increases, amounting to several hundred percent in some cases, are levied on short-term uses, and this regressive pricing model is being adopted by

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Archives

Select Month

Summary

- I hope this was a good way to get you thinking about issues it's about collections, services, publishers and networked mobile access
- Libraries are masters at adapting to change and constantly evolve their services we will figure out how adapt to the issues outlined
- I think Nancy Gibbs is correct about selectors
 - and so is Joe Esposito
- Rest of the day will provide real tips and share answers in how to get started. Opportunity to think about your library needs and how your users are served. Think local use but also think statewide use. We are all librarians dedicated to doing our best to our users with a good perspective on that future will bring more change.

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THANKS!!