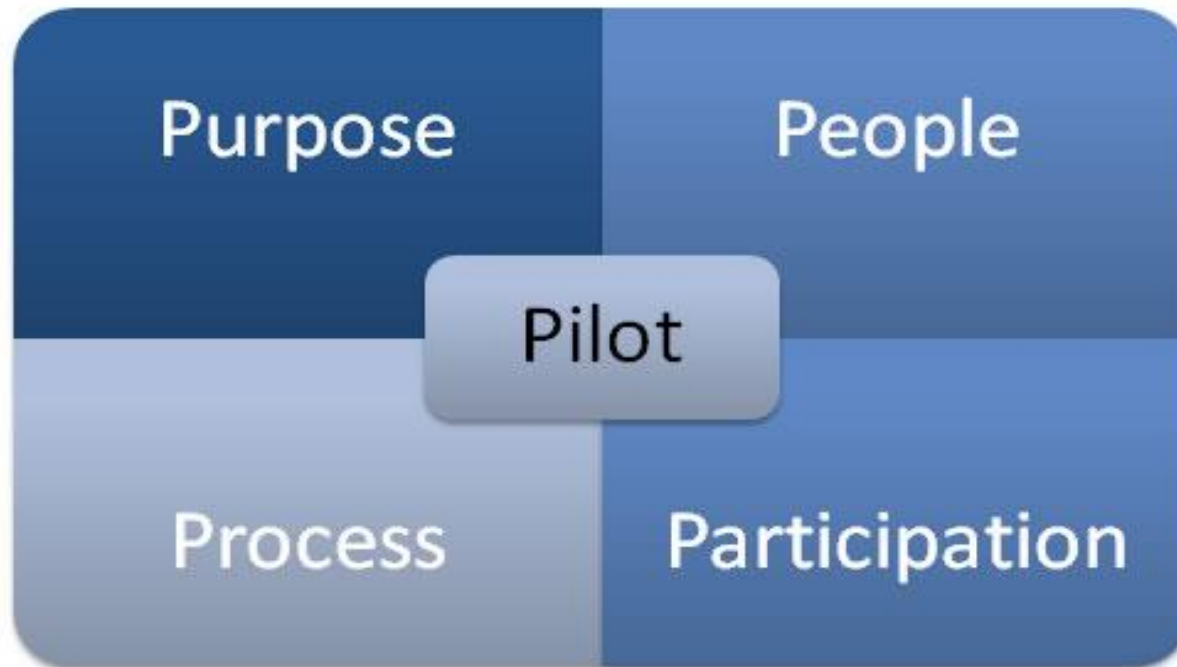# PDA and Assessment

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IACRL March 20, 2014

Campus Facts

- **44,000** Total students: 32,000 undergraduate and 12,000 graduate and professional students,
- **5,000+** courses offered; over 150 programs of study
- **3,000** faculty; **7,700** staff
- **Library has 14 million volumes and over 55 million visitors to the Library website annually**
- **Active member of CARLI and I-Share member...borrower and lender**

PDA : what to assess?
Goals, Measures and Outcomes

Goals: a process that works; satisfied users, stakeholders identified, educated staff, progress towards ideal an access, collection used, lower costs

Measures: Use, Surveys of all stakeholders, volume of participation, cost benefit analysis, process improvement updates, knowledge of process- of stakeholders- of needs, ebook preferences and limitations

Outcomes: higher user satisfaction, increased title use, innovation, new relationships, involved stakeholders contributing to new process, enhanced knowledge, questions revealed, assumptions overturned, options clarified, baselines established for future, questions outlined for....more assessment

PDA=Intersections

- A user needs a book!
- Access to a title –copy availability or not owned
- Streamlined requesting
- Purchasing or lease options
  - Print issues: in stock/delivery, E issues: available, #users, DRM
- Enhanced Discovery of titles: Records, Platforms
- Collection building: local or consortium
- Publishers and the marketplace
- Vendors and their roles in assisting libraries to purchase and publishers to sell
- Librarians and staff and users

Context: an Evolving Services-PDA one piece

- Built a collection
  - Let users request a title on the shelf and then delivered it to them
- Built it statewide across 86 plus libraries (access to copies!)
  - Let users request a title on THOSE shelf and then delivered it to them
- Not on ours or partner shelf? We bought it …ILL Own program
- Received but not yet processed. Made it possible to request it
- We buy most serials as online only and more and more ebooks from publishers and from aggregators almost 1 million titles
- Adding purchase on demand program(s) was a no brainer

- So we have now done many and learned from each

PDA Programs

- PILOT Consortium print purchase program: 2010
- Local Ebook test: 2010
- Local PDA that overlaps core academic profile program: 2011
- Formal Consortial print program: 2/2012
- Ebook program in Humanities and Social Sciences:2012 and 2013
- Brand new retrospective program in 2014

First PDA: goal –will it work

- Joint Print PDA: loaded too many records had too little money and let users buy 190 titles –

- Rush process and delivery worked: needed tweak notes in records

- Reviewed titles subject and academic levels and not all academic content

- Use good:1/3 one use, next 1/3 2-3 uses, final 1/3 4 and over

- User and staff survey to see what worked and what didn't

Outcomes Measures

- Pilot projects process work well and can evolve
- Obtaining print books quickly works
- Users satisfied, staff excellent input to improve
- Diverse participation in process (vendors and stakeholders with some moving from reactive to planning)
- Need more controls on content (Vendor)
  - Needed other vendor purchase options for RUSH
- Needed baseline use for comparison for contd assessment (subject, length of time in I-Share, cost...)

Expanded to PDA Ebooks

- Could we do a similar process for Ebook PDA
- Goal: immediate access, what was available, how are ebooks used and metrics available on use
- Got title list from vendor and worked from that to load subset of 6,000
- Ebooks :232 bought - 2500 separate users sessions, 20,000 pages viewed/printed
- User survey not possible in same way however
  - needed more information about their experience
- Title list problems (older content, messy serial records and limited publisher participation
- Triggers use problems as to find one didn't want book =trigger
- DRM experience gave us both insight and ammunition for change

Build on Success

- Formal Consortial plan: NEW publishing output profile match of academic books loaded into a shared by 86 libraries central catalog: small regular record loads: learned to control content, knew copy purchasing less, knew good meet rush time frame

- Introduced a local user request plan with total overlap with core book plan that pushed virtual slips to selectors for ordering

  - Meant users could request if selector did not and Also provided funds to cover end of year access for users when ordering on hold and when funds depleted

- Ebooks:YBP title orders for major vendors

  - Explore user use and other options

  - More studies on user preferences

CARLI Metrics

- In 7 months 346 books spending 18K- 2 years later 1635 and spent 81K

- 31 still on hold months (94 now), 257 single use (880 now), 58 books more then one use (646 now) with a few up to 6 uses (55 now over six)

- 65% (57.4% now) within last three months of publication

- 35% (42.6% now) older than that but non older then Jan 2012

- Record cumulate in catalog

- contract that to several years ago when all bought more copies anticipating use

UIUC Local

- In ten months bought 744 titles for $30,000
- Subject allocation (70 funds)will fund the book if underspent, PDA fund will fund it if subject fund on target: PDA/408   Subject/336
- All LC classes requested/ turnaround 1.9 days
- All user categories with largest Faculty then graduate students
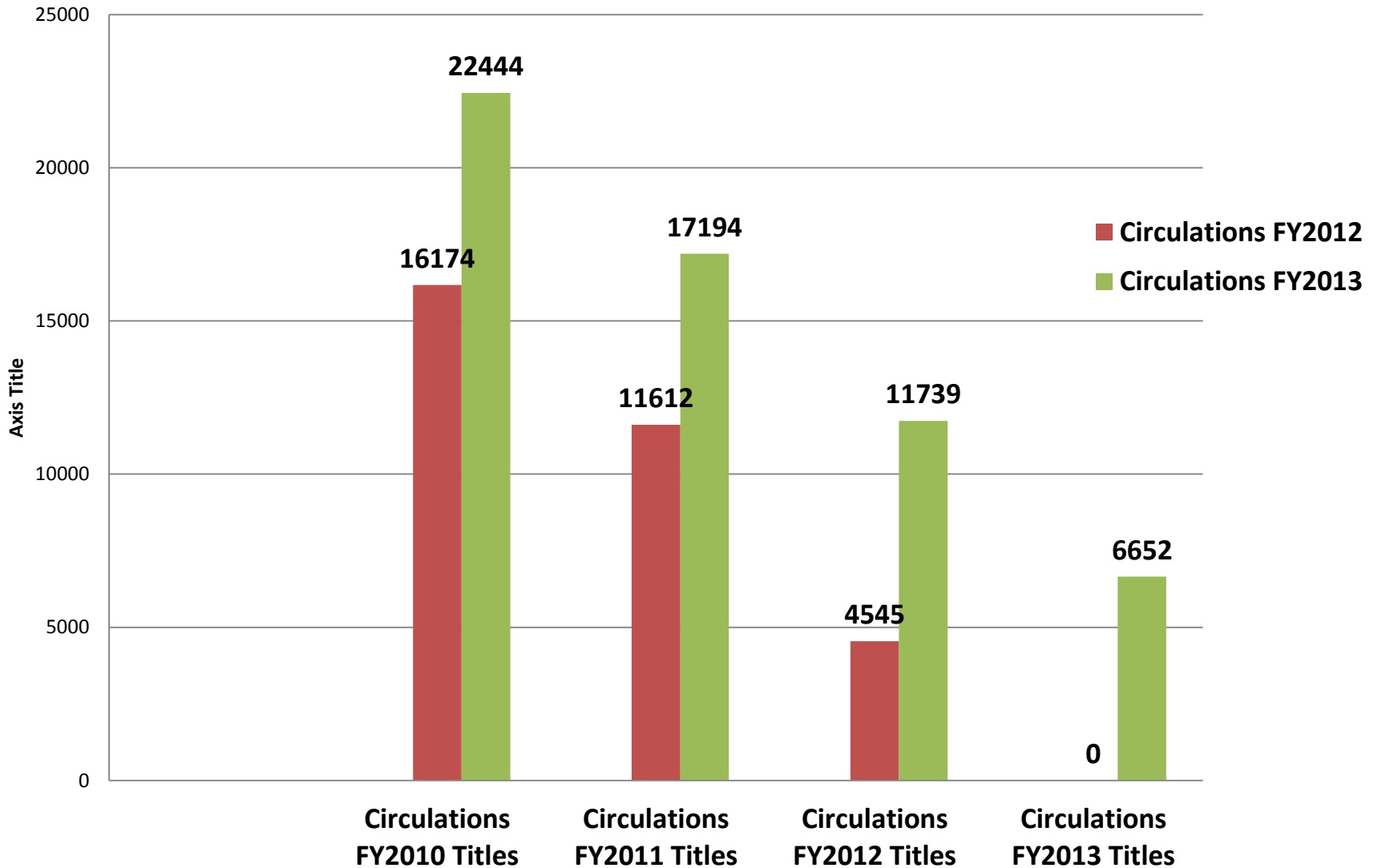- 1058 charges FY2012: 0 use 13%, 1 53%, 20% had 2, 14% 3 and over

New Questions

- Baseline use statistics: lots of chatter about PDA!
- Usage of ebooks: new metrics about use
- What is available from publishers as part of a PDA
- program/DDA (seeing less RUSH Stock print, Limited ebook availability
- Trigger vs STLS and what is in those collections
- Users and ebooks, what is their experience? reading preferences, devices used
- Buying more E retrospectively, can users help guide us

		Purchase year	2010	2011	2012	2013
Circulation Frequencies						
		zero freq 2012 year	4,732	7,065	9,092	na
		zero freq 2013 year	3,879	5,836	7,311	10,409
		one to five 2012 year	6,364	6,221	2,927	na
		one to five 2013 year	7,105	7,331	5,419	3,466
		six to ten 2012 year	247	102	16	na
		six to ten 2013 year	321	210	39	27
		over ten 2012 year	37	9	15	na
		over ten 2013 year	76	20	17	9

Titles circulations from 2012-2013 by purchase year

Ebook PDA Useage

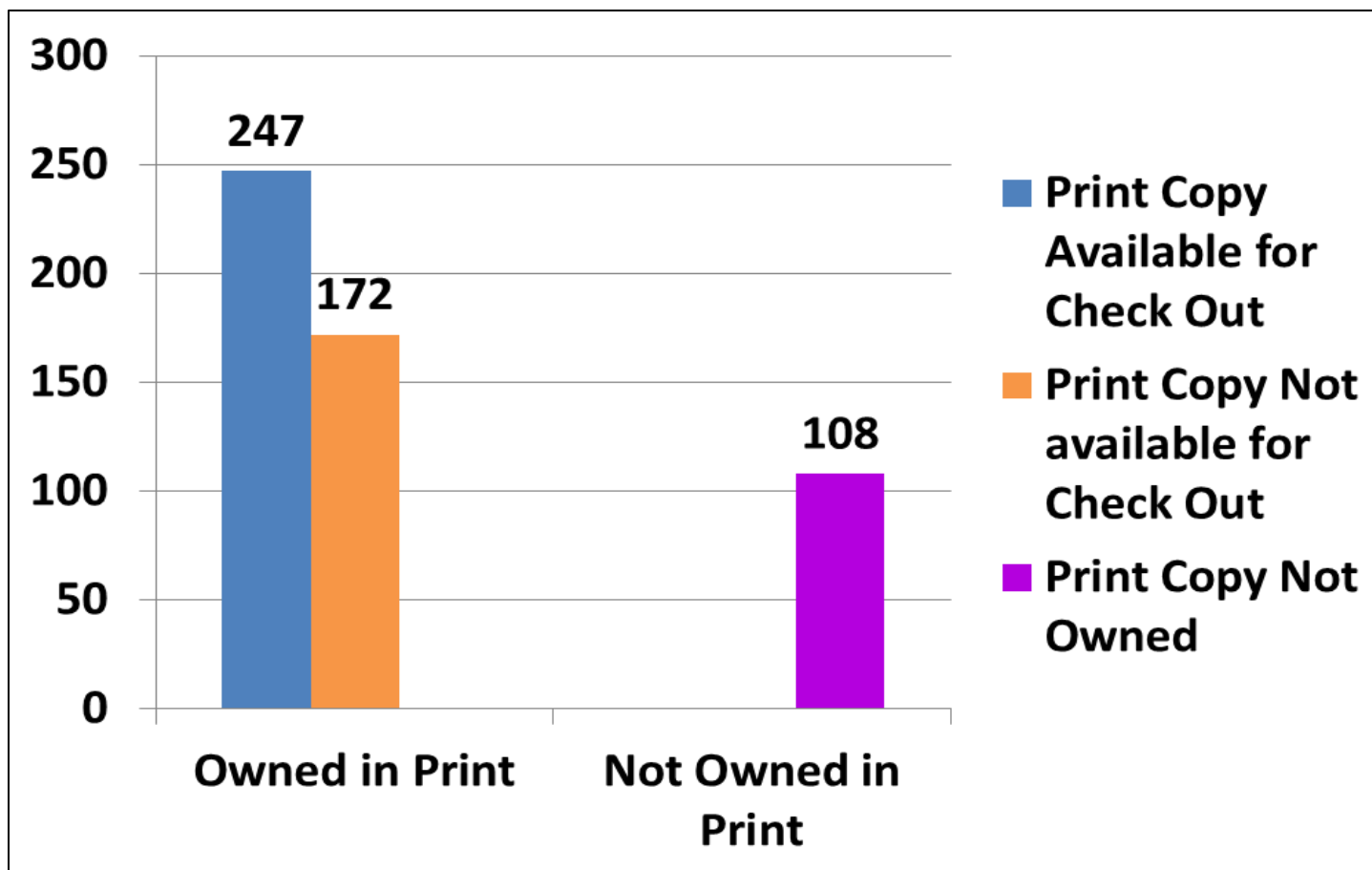| User Session Freq	2011	Percent of total	2014	Percent of total
single	95	41%	24	10%
2 through 6	108	47%	72	31%
7 through 11	16	7%	58	25%
over eleven	11	5%	77	33%
	high of 52 sessions per one title		high of 436 sessions per one title	
Pages viewed	19102		91521	79% increase

Ebook PDA and User Survey

- Two types of studies were used to determine how humanists are currently using ebooks and their opinions concerning ebooks in their disciplines:

- Patron-Driven Acquisition (PDA) via the ebrary platform.

- A local, UIUC survey of 162 humanities faculty and graduate students

PDA Short Term Loans

- Records selected (about 8,700) were loaded into our OPAC.

- Since we also wanted to see an overlap with the print collection to note preferences in format, we added titles we already owned in print.

- We added the ebook links and the proxy prefix for remote access.

- We were notified of any STL as titles were used via an email alert.

- Any activated title was then searched to see if we owned it in print and also noted if the print was then circulating, to account for options in use.

- We received weekly reports of cost and use from ebrary and could also monitor PDA costs online at our ebrary admin account.

- This study captures use and purchase from November 2012 through April 2013, for a total of six months.

Availability Status of Title at Time of Use

527 items: 21% not owned in print. 79% were owned in print and of those, 33% were available to the researcher to be checked out.

Two Short Term Loans Top 5:	Three Short Term Loans (Purchase) Top 5:
User Sessions: -19 -18 -16 -9 -9	**User Sessions:** -54 -40 -40 -39 -29
Pages Viewed: -4222 -340 -334 -293 -284	**Pages Viewed:** -4021 -1087 -1020 -1006 -726
Pages Printed: -172 -125 -105 -10 -9	**Pages Printed:** -263 -138 -113 -91 -42
Chapter Downloads: -18 -6 -5 -5 -4	**Chapter Downloads:** -31 -25 -20 -19 -18

Follow up survey to Faculty Grad students

- The survey included over 30 questions about E vs. P book preferences and use and also led participants through a ebook search, access and use in their discipline and asked two open ended questions on users' opinions of ebooks.

- Emails were sent to faculty and graduate students in six humanities disciplines inviting them to fill out the survey, matching the subject areas to the ebrary study:
  - Art/Art History   History
  - Architecture   Music
  - Classics   Religion/Theology

Survey Results

- Print still loved
  - Easy, notes, text compare etc.

  But see the tipping point to E and there are few books in E!

- Ebook
  - Convenient, access 24/, text searching and some see new potential there for annotating and teaching

- Want devices, easier platforms no DRM

After participating in this study, are you more interested in using ebooks?

- No. I like hold the text, being able to mark in the margins, have multiple books open in front of me, to be able to flip through to the section I need, the physical object also is important and helps me to organize my thoughts. Plus, I like having a nice full bookshelf.

- No. Digital rights management cripples the usefulness of legitimate ebooks. Most people that I know download them illegally as PDF or epub files. If the publishing industry wants to prevent copyright infringement, they need a DRM system that doesn't make their ebooks unusable.

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Next up

- Doing analysis of same PDA/Survey with Social Sciences

- Just closing survey for Sciences: article forthcoming on Humanities then all three

- Also beginning review of large record load of ebooks, we can't buy all the ebooks out there so we are "asking" our users BUT also reviewing that PDA content to Package titles----stay tuned   ASSESSMENT NEVER ENDS

THANKS!!

- IMLS Grant (ARL LibValue)

- RPC Grant from UIUC

- GA help (Jean Louise Zancanella)

- Colleagues/staff

- CARLI