

5-13-2015

# Let Them Eat PDA: Inspiring Innovation with Emerging Selection Models

Valerie L. Boulos

*Florida International University, vboulos@fiu.edu*

Andrew Copnick

*Nova Southeastern University*

Rachel Perry

*Nova Southeastern University*

Erin Gallagher

*Rollins College*

Follow this and additional works at: <http://digitalcommons.fiu.edu/glworks>



Part of the [Library and Information Science Commons](#)

---

## Recommended Citation

Boulos, Valerie L.; Copnick, Andrew; Perry, Rachel; and Gallagher, Erin, "Let Them Eat PDA: Inspiring Innovation with Emerging Selection Models" (2015). *Works of the FIU Libraries*. 34.

<http://digitalcommons.fiu.edu/glworks/34>

This work is brought to you for free and open access by the FIU Libraries at FIU Digital Commons. It has been accepted for inclusion in Works of the FIU Libraries by an authorized administrator of FIU Digital Commons. For more information, please contact [dcc@fiu.edu](mailto:dcc@fiu.edu).



# Let them eat PDA

Inspiring Innovation with Emerging  
Selection Models

*Panel presenters:*

*Valerie Boulos, Andrew Copnick, Erin Gallagher,  
Rachel Perry*

# Agenda/Topics to Be Covered

- Why PDA?
- Planning Process
- Implementation
- Ongoing Maintenance
- Looking Ahead
- Pop Quiz



# Why PDA



# Why PDA

- SPACE...SPACE...SPACE
- Lack of a subject selector precipitated the need to continue collection development and selection of materials (FIRM ORDER, APPROVAL PLAN)
- A need to expand e-book availability based on delivery of curriculum
- Providing resources to library patrons in terms of what they want AND what they need
- Proven and cost-effective method of collection development

# Planning Process



# Planning Process

- Goal to add quality content to collection while maximizing budget to pay for items with substantial use
- Vendor selection can be simple as using existing primary book/e-book vendor
- Multiple vendors require a need to de-duplicate purchased items in a previously used profile
- Be knowledgeable of the potential audience that will trigger subject content
- Get stakeholders on board with initiative, notably Subject Bibliographers, fully invested in the PDA process
- Investigate whether there are exclusivities from publishers that restrict content from being loaded onto an e-book PDA

# Planning Process

- Determine record loading policy --- are order records attached (non-encumbering/suppressed)?
- Review profile and Non-Subject Parameters (NSP's) carefully since people are not perfect and vendors may inaccurately communicate what needs to be populated in formal profile that drives PDA (e.g., price range/cap, formats, subject areas, textbooks)
- Assess the loading of records
  - Are the records "brief" discovery records OR are they full records that adhere to both formal cataloging and in-house standards?
- What is the frequency of invoicing
- Need to analyze the reporting mechanisms that are in place by the vendor (e.g., trigger reports, usage reports)
- Determine whether institution permits a deposit account structure for Usage Demand Acquisitions (UDA) model



# Implementation



# Implementation

- Existing Approval Plan (AP) plans may be re-purposed with specific subject classification areas targeting PDA
- Create workflow for the receipt of discovery records, monitoring of usage data/trigger reports, invoicing, and payment
- Budgetary allocation is collective pool of funds or individual allocations per subject areas
- Single-user license model preferred over Short-Term Loans (STL)
- Bibliographic/Order records includes standard phrases and coding to identify items acquired with PDA for ease of statistical gathering

# Implementation

- Bibliographic record load table set to reject duplicate ISBN's for prevention of items selected and/or paid via firm ordering or Approval Plan
- Single point-of-access e-book platform selected to prevent duplication on a different aggregator

# Ongoing Maintenance



# Ongoing Maintenance

- Closely monitor usage data/trigger reporting mechanisms to prevent an over-budget situation
- If lack of trigger events review PDA profile for any limitations
- Act quickly to remove traces of records that might lead users to pulled publisher's content and "dead ends"
- Bibliographic maintenance to clean records as per cataloging policies
- Annual review of PDA holdings --- maintain accumulated collection or weed non-triggered titles

# Looking Ahead



# Looking Ahead

- To market or not to market? That is the question...
- Present the successes of PDA to faculty and reinforce as a “cost-intelligent” collection development model that engages and involves users in the decision-making process
- Monitor vendor policies (re: triggering events) and publisher participation and assess if PDA content is worthwhile and relevant to course curriculum
- Lobby non-participating vendors to adopt a PDA model (or some semblance of it)
- Budget consideration, especially with UDA programs

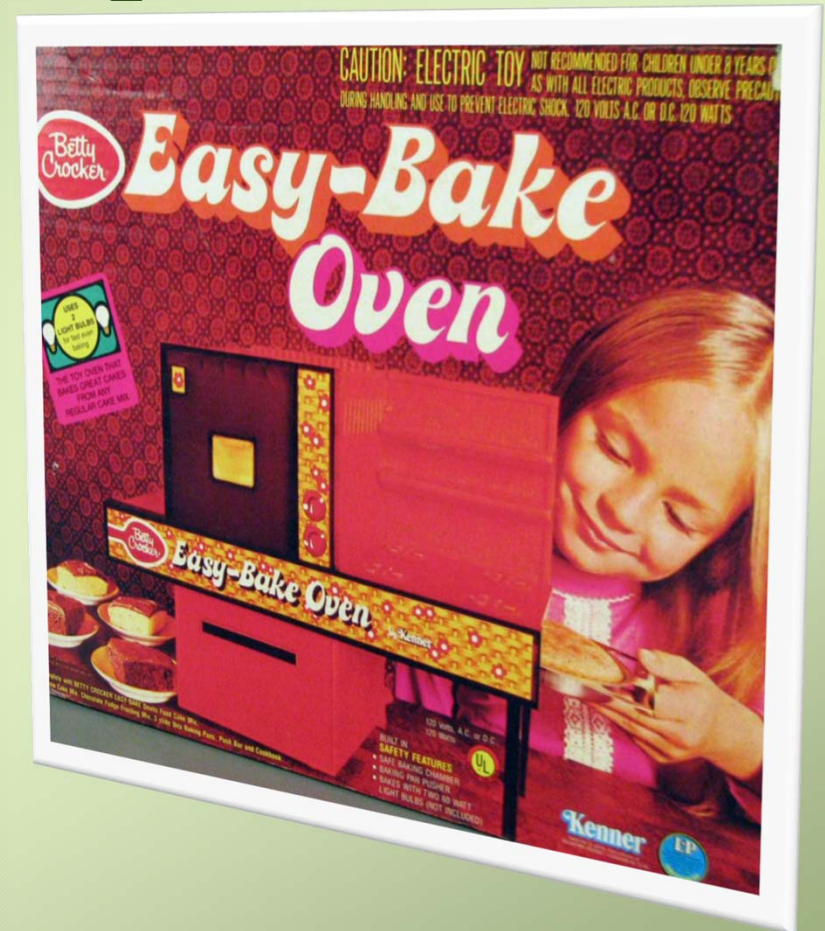
## Q&A

When a cow  
laughs, does  
milk come out  
of its nose?



# Thank you for attending!

- Valerie Boulos [vboulos@fiu.edu](mailto:vboulos@fiu.edu)
- Andrew Copnick [copnick@nova.edu](mailto:copnick@nova.edu)
- Erin Gallagher [egallagher@rollins.edu](mailto:egallagher@rollins.edu)
- Rachel Perry [rperry@nova.edu](mailto:rperry@nova.edu)



# And for another slice...

- Brooks, Stephen M. "What's Next for eBook Acquisitions? Challenges for Libraries, Vendors, and Publishers." *Against the Grain* 25, no. 2 (2013): 26-28.
- Carrico, Steven, Leonard, Michelle, and Gallagher, Erin. Forthcoming 2015. *Implementing and Assessing Use-Driven Acquisition Programs in Academic & Special Libraries: A Practical Guide*. Rowman & Littlefield Publishing Group.
- Currie, Lea, and Kathy Graves. "A New Model for Demand-Driven Acquisition." *Kansas Library Association College and University Libraries Section Proceedings* 2 (2012): 12-16. doi: 10.4148/culs.v2i0.1611.
- Dewland, Jason C. and See, Andrew. "Patron Driven Acquisitions: Determining the Metrics for Success." *Library Resources & Technical Services* 59, no. 1 (2015): 13-23.
- Downey, Kay. "Technical Services Workflow for Book Jobber-Mediated Demand Driven ebook Acquisitions." *Technical Services Quarterly* 31, no. 1 (2014): 1-12. doi: 10.1080/07317131.2014.844617.
- Fischer, Karen S., Michael Wright, Kathleen Clatanoff, Hope Barton, and Edward Shreeves. "Give'em What They Want: A One-year Study of Unmediated Patron-driven Acquisition of Ebooks." *College & Research Libraries* 73, no. 5 (2012): 469-492.
- Goedeken, Edward A., and Karen G. Lawson. Forthcoming 2015. "The Past, Present, and Future of Demand Driven Acquisitions in Academic Libraries." *College & Research Libraries*.
- Hodges, Dracine, Cyndi Preston, and Marsha J. Hamilton. "Resolving the Challenge of E-books." *Collection Management* 35, no. 3 (2010): 196-200.
- NISO (National Information Standards Organization). *Demand Driven Acquisition of Monographs*. Baltimore: NISO (2014). [http://www.niso.org/apps/group\\_public/download.php/13373/rp-20-2014\\_DDA.pdf](http://www.niso.org/apps/group_public/download.php/13373/rp-20-2014_DDA.pdf)
- Nixon, Judith M., Robert S. Freeman, and Suzanne M. Ward. *Patron-driven Acquisitions: Current Successes and Future Directions*. New York; London: Routledge, 2011.
- ReadersFirst. 2014. *Guide to Library E-book Vendors*. 1-17. <http://readersfirst.org/ReadersFirst-Guide--Library-E-Book-Vendors.pdf>