



# Patron-Driven Acquisition - an additional route for the allocation of e-books?

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Jutta Matrisciano, Deputy Library Director, Medical Faculty Mannheim



# Topics

- Overview of PDA - evolution, providers and business models
- PDA project at the University Library of Heidelberg and the Medical Faculty Library of Mannheim
- Data Management
- Evaluation and conclusion

## New e-books



# PDA – evolution, providers and business models

- Since 2009 U.S. and Australian academic libraries are making use of the current PDA models
- Major PDA vendors: Ebrary, Ebook Library (EBL), MyiLibrary : aggregate English-language e-books from multiple publishers
  - different vendors offer different terms of use
- Early adopters of the PDA-model in Germany 2010/11: SLUB Dresden, UB Bielefeld, UB Mannheim ; UB Erlangen-Nuremberg
- Motivation of PDA implementation: shift from „just-in-case“ to „just-in-time“ collection development & financial limitations of library budgets



# PDA – „predecessors“ – early elements of patron participation

- Acquisition requests
- Requests for interlibrary loans
- Survey amongst patrons / high number of reservations per title
- Only a small part of library budget was dedicated to patron-initiated purchase
- **Recent development** : more user-centred collection building → implementation of e-book and print PDA models in German academic libraries



# PDA – business models – most popular suppliers

## MyiLibrary

- use of cover / table of contents : free of charge
- First use of content : free of charge
- Second use of content : purchase is triggered automatically
- vendors: Missing Link ; Swets

## Ebook Library (EBL)

- 5 min use – free of charge
- >5 min use causes Short Term Loan (7 days / 10 % of e-book-purchase price )
- after 3 STL : auto purchase of e-book-title → 130% of purchase price
- has merged on 1st May 2014 with Ebrary (also ProQuest –owned)
- new platform „LibCentral“
- vendors: Lehmanns Media ; Dreier ; Massmann ; Swets



# Ebrary – conditions & terms of use : Patron

- Discovers e-book title by researching within the OPAC / discovery system
  - No difference visible to e-book titles which are already owned by the library
- „Trigger-events“ causing Short Term Loan or Purchase :
  - 10 mins of perpetual usage (excluded : title pages, index of contents, subject index)
  - Reading 10 consecutive pages
  - One time: copy, print, download



# Ebrary – conditions & terms of use : Library

- **Profile is set up by subject librarian** : selection of subject group, publishers, publication years, cost limit, language, ...
  - e-book title pool is built up / import of metadata (MARC-format)
- Budget is assigned to each discipline
- Overview of „trigger-events“ and costs via e-mail-alerts
- Limitation or intermission of duration of the project is possible
- **Different models of acquisition** :
  - with/without short term loans per day / per week
  - licenses for perpetual use : one or (e.g.) three concurrent user sessions
  - Moderated or not moderated model available



# Librarians view of the profile

## PDA- setting of the profile



**1. LOC-classification**

**2. Select publishers**

**3. Additional criteria:**

- Publication year(s)
- Price limitation per title
- Language ...





# Overview of publishers

## Verlage – eine Auswahl:



- Blackwell Publishing
- Cambridge University Press
- Continuum
- Elsevier
- Greenwood Press
- Harvard University Press
- John Wiley & Sons
- Manchester University Press
- McGraw-Hill Book Companies
- MIT Press
- Oxford University Press (UK and USA)
- Palgrave Macmillan (US and UK)
- Random House, Inc.
- SAGE Publications
- Taylor & Francis Group
- Yale University Press
- Springer
- Walter de Gruyter
- Max Niemeyer Verlag
- Gunter Narr Verlag
- Wiley VCH
- Georg Olms Verlag
- Klostermann Verlag
- Vandenhoeck & Ruprecht
- Duncker & Humblot
- Schaeffer-Poeschel
- Felix Meiner Verlag
- Narr Francke Attempto
- Mohr Siebeck
- Erich Schmidt Verlag
- C.H. Beck



# PDA project at the University Library Heidelberg and the Medical Faculty Library of Mannheim

## Settings of the profile for title selection:

- **Publication year** : 2009 – 2012 / second term: 2009 – 2013
- Exclusion of print and online titles which are already within the library's collection
- **Price limitation** 20 – 200 € per title
- **Language**: German ; English
- **Short term loan & moderated model** ( first STL → moderation / possibility to delete title after first loan period / second STL → automatic purchase)
- **Supplier**: Dietmar Dreier GmbH ([www.dietmardreier.de](http://www.dietmardreier.de))



# PDA with Ebrary - E-book acquisition & allocation

## Timeframe:

from June 2013 to June 2014 (with a few weeks of intermission)

**2 different profiles** : the humanities - the sciences

**Number of titles – profile „sciences“:**

8.200

**User sessions:**

4.129

**Pages viewed:**

48.608

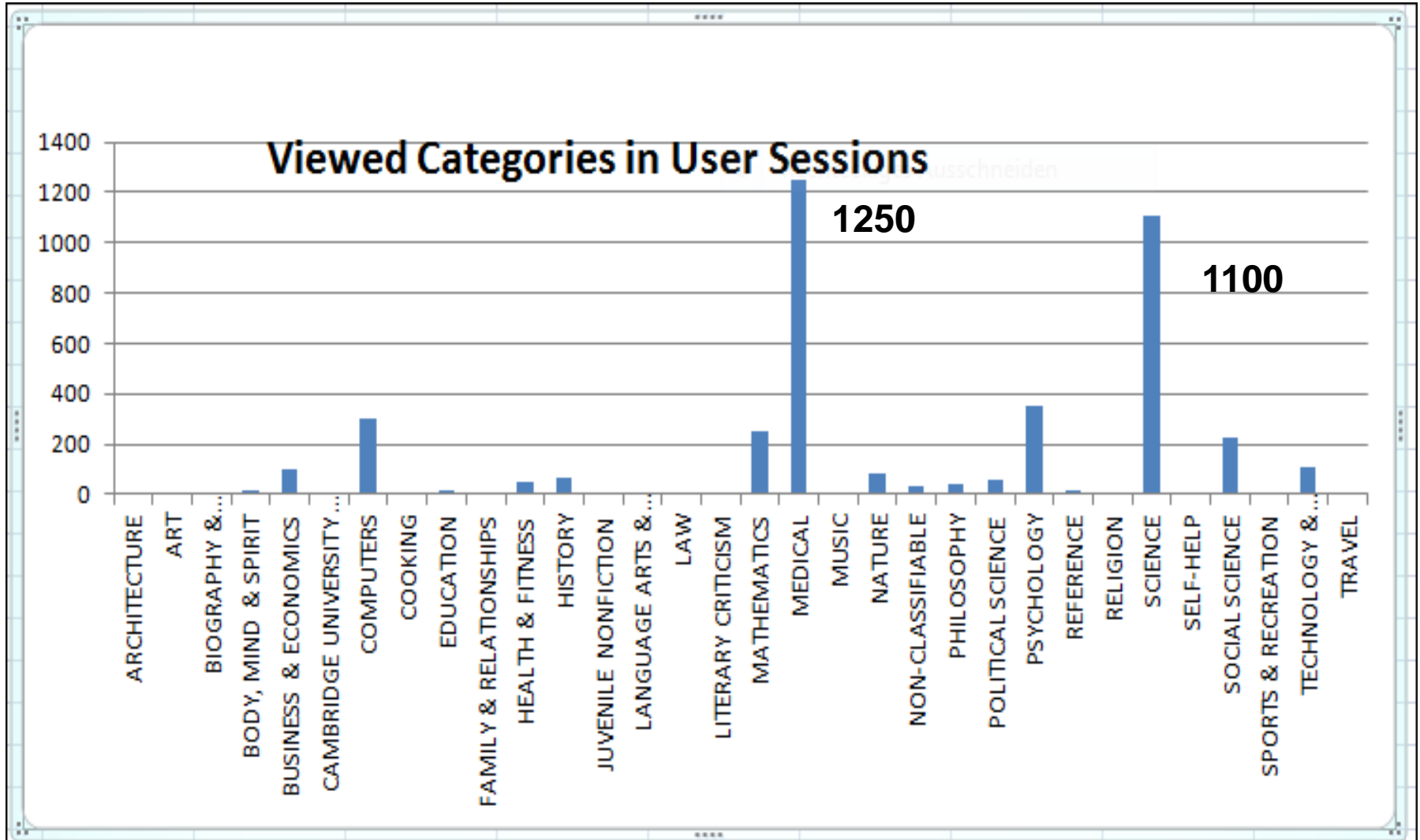
**Pages printed:**

2.403

**STL-usage: 192 e-books**

**Permanent usage / acquisition : 81 e-books**

# PDA – patrons preferences in subject categories



# PDA with Ebrary – financial aspects

- Budget for testing PDA-adoption (University Library of Heidelberg and Medical Faculty of Mannheim ): **€ 45.000.-**
- Approx. 1/3 of the budget used for STM-disciplines
- **average cost per e-book-title : € 84.- (purchase)**
- **STL fees: € 8.200.- (192 e-books)**
- E-books in STL or purchase mode can be used from both sites : Univ. Library Heidelberg and Med. Faculty Mannheim (different IP-ranges)

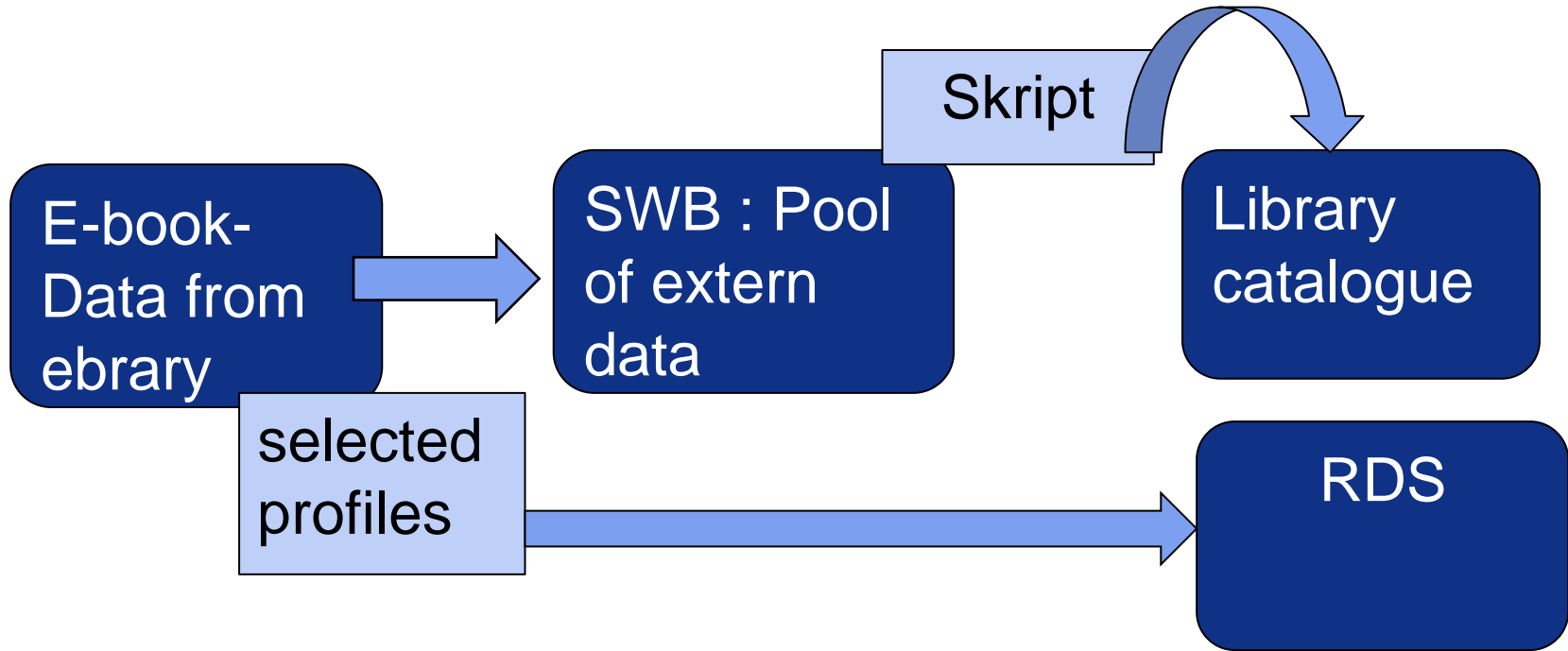


# PDA – Data Management

- Selected titles : metadata is provided by ebrary in MARC-format
- Check for duplicates quite complex (not sufficient via ISBN / include title- and author-fields as well)
- Metadata is imported into library's OPAC or search index
- No difference in OPAC-display between e-book-titles the library already owns and e-book-titles from ebrary
- Patron-triggered use causes STL or / and purchase
- E-book-titles are reported via e-mail to subject librarian → moderated model → possibility to delete title after first STL period



# PDA–Data Management– focus on library network (BSZ)



See also: Volker Conradt | E-Books und PDA in den deutschen Verbänden | Bremen, 2014

# PDA – Data Management – focus on local conditions

3000 !408876212!Sköld, Ola  
3210 Antibiotika och antibiotikaresistens <engl.>  
4000 Antibiotics and antibiotic resistance\$nElektronische Ressource\$hOla Sköld  
4022 Online-Ausg.  
4030 Hoboken, N.J.\$nWiley  
4048 [Palo Alto, Calif.]\$nEbrary  
4060 XIV, 207 S.  
4061 graph. Darst.  
4068 Online-Ressource  
4085 \$uhttp://site.ebrary.com/lib/alltitles/docDetail.action?docID=10577575\$xG  
4119 ebrary online  
4201 Aus dem Schwed. übers. - Includes bibliographical references and index  
4243 Druckausg.: !394369394!Antibiotics and antibiotic resistance / Sköld, Ola  
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Klinischen Medizin # A. Formalschlüssel # Kompendien, Repetitorien, Leitfäden, Kurzdarstellungen, programmierter Unterricht]  
5540 |u|Antibiotics  
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5540 |u|Anti-Bacterial Agents  
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5550 !209724277!Arzneimittelresistenz  
5550 |f|Online-Publikation  
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# PDA – Data Management – focus on local conditions



UNIVERSITÄT HEIDELBERG | ZUKUNFT SEIT 1386

Online-Katalog der Bibliothek der Medizinischen Fakultät Mannheim

Suche	Merkliste	Konto	weitere Angebote	
Einfache Suche	Erweiterte Suche	Suchhistorie	Suchergebnis	

Ihre Suchanfrage Titel/Stichwort = Antibiotics and antibiotic resistance

## Treffer lokale Datenbank (1)

1.



### Antibiotics and antibiotic resistance

Sköld, Ola  
2011 ; Wiley

[in die Merkliste](#)

### Antibiotics and antibiotic resistance

**Autor:** Sköld, Ola

**Verlagsort, Verlag, Jahr:** Hoboken, N.J., Wiley, 2011

**Umfang:** XIV, 207 S.

**Schlagwort:** Antibiotikum , Arzneimittelresistenz , Online-Publikation

**ISBN:** 978-0-470-43850-3

[in die Merkliste](#)

[Exemplare](#) | [Vormerken/Bestellen](#) | [mehr zum Titel](#) |

**Volltext-Link:** <http://www.ub.uni-heidelberg.de/cgi-bin/edok?dok=http%3A%2F%2Fsite.ebrary.com%2Flib%2Fubheidelber...>

**Autor:** Sköld, Ola

**Titel:** Antibiotics and antibiotic resistance



# PDA – Data Management – focus on local conditions

The screenshot displays the Universitätsbibliothek Heidelberg website interface. At the top, there is a navigation bar with 'Home', 'Search', 'QuickView', and 'Bookshelf' options. A language dropdown is set to 'English', and there are links for 'My Settings', 'Sign In', and 'Hel'. Below this is a search bar with 'Simple Search' and 'Search' buttons, along with 'Advanced' and 'All Subjects' links. The main content area shows a document viewer for 'ANTIBIOTICS AND ANTIBIOTIC RESISTANCE'. The left side features a large image of the book cover, which includes a petri dish with bacterial growth and a timeline of antibiotic development from 1920 to 1990. The right side shows a table of contents with sections like 'Intro', 'CONTENTS', 'Preface', and numbered chapters from 1 to 11, ending with an 'Index'. The interface also includes a 'Download' button, a 'Limited-user Title' indicator, and a page number 'Page 1 (1 of 223)'. There are also navigation icons and a 'Search Document' button.

Patron's personal account on the ebrary platform: annotate documents, add titles to bookshelf, save bookmarks ...

# Development of PDA-models : policy and pricing

- analysis of usage reports caused libraries to increase the number of STL before title is purchased (e.g. : UB Leipzig : 7 one-day STLs before purchase of e-book)
- effective July 1, 2014 : publishers increased Short-Term Loan fees

Name of publisher	Current 1-day STL	New 1-day STL	Current 7-day STL	New 7-day STL
Princeton University Press	10%	40%	15%	50%
Emerald	10%	20%	20%	30%
Royal Society of Chemistry	10%	50%	15%	65%
Louisiana State University	15%	30%	20%	40%
NYU Press	5%	25%	10%	45%
Cambridge University Press	20%	30%	30%	60%
World Scientific	5%	40%	10%	50%
John Benjamins	10%	25%	15%	35%
Kogan Page	N/A	25%	N/A	45%

- University Library of Heidelberg: stopped the PDA-test ; decision for resumption is pending, possibly only for selected disciplines

# Evaluation and conclusion

- High percentage of Short Term Loans → optimum use of available budget
- PDA e-books are used at least one time (STL) or several times when purchased (depending on PDA policy) - e-books /monographs bought via approval plan : use not guaranteed
- Participation of patrons in collection building → library is gaining customer loyalty because of customer satisfaction
- Paradigm shift from „just-in-case“ to „just-in-time“ allocation of content is necessary when libraries budgets are decreasing
- **PDA-model : successful, but only one element of collection building in combination with traditional methods!**



Thank you !  
Any questions?

