

# PDA checklist for academic libraries

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# What is PDA?

- Patron Driven Acquisition
- Method offered by e-book aggregators
- Show un-owned e-books in the local catalogue
- Free browsing period
- Automatic loan/rental or purchase
- The library only pays for books that are actually used

# Project - purpose



- A project funded by the National Library of Sweden
- Uppsala, Malmö and Södertörn university libraries
- February-November 2012
- Main focus: Create a basis of knowledge that can be useful for other libraries

# Project - implementation

- Collect earlier experiences
- PDA vendor survey (Dawson, EBSCO, ebrary, EBL and MyiLibrary)
- Test period (April-September)
- Create checklist
- Report published online in December

# Participating universities

- Malmö: many subjects, ca 13 000 FTE  
PDA-budget 150 000 SEK ( $\approx$ € 17 200)
- Södertörn: many subjects, ca 8 500 FTE  
PDA-budget 100 000 SEK ( $\approx$ € 11 400)
- Uppsala: two subject libraries;  
economic library ca 6 000 FTE, PDA budget  
28 000 SEK ( $\approx$ € 3 200)  
science library, ca 6 000 FTE, PDA budget  
68 000 SEK ( $\approx$ € 7 800)

# PDA checklist

- Result of experiences during the testperiod
- Intended to be used by libraries who are considering starting PDA
- By thinking through the prerequisites and demands libraries will be better prepared

# Possible PDA objectives

- Better collection
  - Better service
  - Replacing manual purchasing
  - Saving money
- ✓ Which goals are important to you – where should your focus be?
  - ✓ All these goals probably can't be achieved at the same time

# PDA profile

- Subject categories
  - Publishing year
  - Language
  - Publishers
  - Classification
  - Readership level
  - Price cap
  - Keywords  
(include/exclude)
- ✓ Which limits does your library want and which profile settings are important?
  - ✓ Choose your vendor in accordance with your requirements



# PDA functionality

- Browsing
  - Loans
  - Mediated function
  - No of loans/ person/day
  - Interface layout
  - Multiple accounts
- ✓ Which PDA model and settings are important?
  - ✓ Choose your vendor in accordance with your requirements

# Vendor collection

- Readership level
  - Type of books
  - Publishers
  - Updates to collection
- ✓ Check if the collection from the vendor meets the library's needs and choose your vendor in accordance with your requirements

# Accessibility

- Making the PDA e-books visible - local catalogue, discovery tool, union catalogue?
  - MARC records
  - Link resolver
  - Authentication
- ✓ Consider where to make your e-books visible
  - ✓ Try to avoid separate platform login

# E-book functionality

- Platform
  - DRM print/copy
  - Downloading
  - Mobile interface
  - Speech synthesis
  - Simultaneous users
- ✓ When the book has been bought it should work together with the rest of the library's collection

# Managing the collection

- Deduplication
  - Unique e-ISBN:s
  - Managing purchased titles
  - Updates
- ✓ Consider which method for deduplication that is most effective. Not all titles will be deduplicated.
  - ✓ Create a structured schedule for updating the PDA collection

# Support and statistics

- Support
  - ✓ What are the library's wishes and demands regarding support, for example, start-up help and response time?
- Statistics
  - ✓ Which statistics are needed? Is it important to be able to separate out PDA use from ordinary?

# Statistics from the project

Free browsing periods	
Malmö	1762
Södertörn	85
Uppsala	1150

  

Loans	
Malmö	572
Uppsala	488

  

Purchases	
Malmö	32
Södertörn	36
Uppsala	40

  

Mediated loans	
Malmö	36
Uppsala	15

# Economy

- Budget
  - Price model
  - Economy reports
  - Invoices
  - Deposit
- ✓ How much of the budget is the library willing to commit to PDA?
  - ✓ What does the vendor's price model include? Are there any additional charges, e.g. platform fee?



# Statistics from the project

	Total cost (€)			Average costs (€)	
	Total	Loan	Purchase	Loan	Purchase
Uppsala	8289	4325	3963	8,87	98,76
Malmö	5490	3355	2135	5,89	64,7
Södertörn	2895	-	2895	-	80,42

	Total cost (€)			Average cost (€)	
	Total	Loan	Purchase	Loan	Purchase
Ekonomikum	3218	1667	1551	7,04	81,29
Ångström	5071	2658	2413	10,59	114,72

# Organization

- Workflow
  - Competency development
  - Involvement of all staff
  - Coordination
  - Assessment
- ✓ Analyze how PDA will affect the workflows and identify possible bottlenecks
  - ✓ Analyze the need for coordination
  - ✓ Were the goals achieved?

# Conclusions

- More purchases via aggregators, more DRM
- Pros and cons of PDA
- Learn as you go. Be prepared for change!
- Test PDA for consortia?
- The report is available at the National Library of Sweden at:  
<http://www.kb.se/bibliotek/Projektbidrag2/avslutade/Avslutade-2012/#Patron>

# Thank you for listening!

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