2011

If Rumors Were Horses

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Patron-Driven Acquisitions

by Xan Arch (Collection Development Librarian, Reed College) <xanadu@reed.edu>

Are you tired of hearing about patron-driven acquisitions yet? PDA and DDA (demand-driven acquisitions) seem to turn up everywhere these days — in conference sessions, vendor visits, and library literature. You’re thinking, how much more can there be to say? You’ve heard so many librarians talk about their institution’s great success with PDA or their abysmal failure. What’s the big picture?

Well, take a look at this Against the Grain issue. It’s not your mother’s PDA.

We’re kicking it off with Bob Johnson and his discussion of the basics of the patron-driven model. He will give you newbies an idea of what matters when considering a patron-driven plan and what to watch out for.

Jason Price, on the other hand, isn’t sold on PDA yet. In his article, he proposes a new model for patron-driven plans that would free the content from restrictive digital rights management (DRM). It may take a superhero to do this, but Jason, the DRM-imator, is up to the task.

PDA seems new and trendy but what happens with a patron-driven collection over time? Peter Spitzform at the University of Vermont has been running a PDA program since before you even knew PDA existed, and he tells us about how the model evolves. He presents data about the University of Vermont’s program as well as an exact measure of the effect of PDA on their collection.

Michael Levine-Clark also discusses how to maintain your PDA collection over time and what libraries will need if we want to move more of our collections dollars to demand-driven models. If PDA is here to stay, how do you make sure you have the right content for your users year after year?

How will patron-driven acquisitions affect scholarly publishing? Rick Anderson and Sandy Thatcher have been giving this a lot of thought, and they debate the question in these pages. Rebecca Seger and Lenny Allen also discuss how patron-driven acquisitions affect scholarly publishing, but they present the publisher’s perspective and challenges.

Finally, what could be more challenging than running a patron-driven acquisition program that covers thirty-six libraries? Emily McElroy and Susan Hinken are part of the Orbis Cascade Alliance consortium’s demand-driven acquisitions team, and their article discusses the Alliance’s search for an effective eBook strategy.

Big thanks to all the authors who turned out such great work, and especially to Jesse Holden, my most valued colleague, who reviewed and edited these submissions with me.

If Rumors Were Horses

Guess one of the biggest things that has happened recently is the merger of EBSCO Publishing and The H.W. Wilson Company. Is this an ideal match? The companies seem to think so. Wilson databases will be loaded onto EBSCOhost over the coming months. EBSCO will continue to maintain WilsonWeb until such time that all Wilson databases are available on EBSCOhost and customers have been transitioned to EBSCOhost.

Those of us on the library acquisitions/leasing side of things hope we won’t see accompanying pricing increases! Watch for our interviews and see the full press release at http://www.against-the-grain.com/2011/06/ebSCO-publishing-and-the-h-w-wilson-company-make-joint-announcement-of-merger-agreement/.

Also — burning up the ciber waves is the litigation between Georgia State University Press, Oxford University Press and Sage with some financing from the Copyright Clearance Center. The plaintiffs have requested an injunction which would limit the amount of copying by professors that could take place without paying licensing fees. Currently professors make copies based on fair use guidelines. As Kevin Smith states in his blog, the case was completed as of June 9, and a decision is expected over the summer.


http://blogs.library.duke.edu/scholcomm/category/copyright-in-the-classroom/

Related to this case is the recent statement of principles regarding document delivery released on June 9 by continued on page 6
From Your (chocolate-loving) Editor:

The PTBs (powers that be) say that chocolate is good for you. Dark chocolate. Of course I love milk chocolate. But milk chocolate must be better for you than, say, fried chicken or French fries. While eating chocolate, a group of us have been working on Against the Grain.

This issue is guest edited by the amazing Xan Arch who has collected articles from Robert Johnson, Jason Price, Peter Spitzfam, Michael Levine-Clark, Rick Anderson and Sandy Thatcher, Emily McElroy and Susan Hinken, and Rebecca Seger and Lenny Allen. We are lucky enough with this issue to have interviews with Phoebe Ayers, and Deborah Kahn. Tony Ferguson is still giving us words of wisdom in Back Talk. Meanwhile Michael Pelikan takes on “mobile,” Bob Nardini talks about competition, Jesse Holden discovers apps, Donna Jacobs discovers cheese and In-dependent People, Bryan Carson straightens us out on Rightheaven, William Rieders looks beyond eTextbooks, Bob Holley mourns the death of the journal, and Scott Smith considers much ado about PDA. Lolly Gasaway has been asked about film snippets and yearbooks, while Steven Douglas and Michelle Flinchbaugh address issues in establishing digital repositories. And, of course this is just the tip of the iceberg! Happy Reading!

Plus, I have to tell you, that a lot of what we didn’t have room to print is in the online ATG, located at www.against-the-grain.com/

Guess I will take a break now and have some chocolate ice cream. And, for those of you who may happen by, I have a cache of all kinds of chocolates in my office. Meantime, have a great summer!

Much Love, Yr. Ed. 🍫

Rumors
from page 1

the International Association of Scientific, Technical & Medical Publishers (STM). In it, STM sets out five guiding principles it believes should be applied in any consideration of document delivery use and services. STM publishers welcome constructive discussion on these principles, and seek participation in wider debates on document delivery.

www.stm-assoc.org
http://blogs.library.duke.edu/school-comm/2011/06/09/a-second-front/

I guess that it is true after all that all good things come to an end. After 12 years of working with Libraries Unlimited, Ron Maas will be leaving the company due to a reorganization. Ron says he has mixed feelings. He has enjoyed his time working with us as wonderful partners, and he hopes we will cross paths somewhere farther down the road. In the meantime, if you have questions about your work with Libraries Unlimited, be sure to check in with Barbara Ittner <bittner@abc-clio.com> who has been at LU longer than Ron (she started with the company when Ron was 12), and Ron says we are in good hands with her and LU will continue to be a force for positive change in the markets that we all serve. Ron can be reached at <Ronmaas99@gmail.com>, or at his home phone 203-373-9597. If you are on LinkedIn, send Ron a connection, and say something nice. He is way too young to retire!

Just back from a fabulous trip! We had the 13th Fiesole Collection Development Retreat in St. Petersburg, Russia. St. Petersburg is an incredibly historic city. We arrived by train from Helsinki, Finland, to the Finland Station where Lenin arrived in a sealed train to begin the Russian Revolution. We were greeted at the train station by Fred Lynden (once head of technical services and scholarly communication at Brown and frequent attendee at the Charleston Conference), and his lovely and vivacious wife Irina, who is Deputy Director General of the National Library of Russia. A cruise on the Neva River gave us a look at many famous landmarks and elegant palaces, and I had to pinch myself when we attended a Russian ballet (Ondine) at the Mariinsky Theatre. Fred looks great! He could be a poster child for retirement. And so does Irina who could be a poster child for working! Hmmm!

Almost forgot! The Retreat! There were many excellent papers given by a host of international librarians, publishers, and vendors. The current Charleston Report has some of my favorite quotes from the Retreat (see www.charlestoncon.com/) but you need a subscription to look at them. Will see what I can do about that! The Casalini Website has many of the papers loaded there for your perusal. Next year’s Retreat is planned for Fiesole, Italy April 12-14, 2012.

http://www.casalini.it/retreat/
http://www.thecconferencecircuit.com/2011/05/04/fiesole-retreat-may-11-13/

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Letters to the Editor

Send letters to <kstrauch@comcast.net>, phone or fax 843-723-3336, or snail mail: Against the Grain, MSC 98, The Citadel, Charleston, SC 29409. You can also send a letter to the editor from the ATG Homepage at http://www.against-the-grain.com.

Dear Editor:

I’m writing to correct an error in Mark V. Herring’s piece, “Can Open Access Save Us?” from the Dec. 2010-Jan. 2011 issue. Herring makes the point in passing that “by definition, open-access archives and/or journals do not provide scholarly vetting (peer review).”

This is not at all what open access is, by definition or in practice. Herring quotes Peter Suber, but he should have dug deeper. As Suber writes, “OA is compatible with peer review, and all the major OA initiatives for scientific and scholarly literature insist on its importance.” There are now hundreds (thousands?) of peer-reviewed OA journals. As one example, librarian and scholar Heather Morrison found that PLoS One, an OA journal from the Public Library of Science, published more peer-reviewed articles than any other scholarly journal in 2010.

Katharine Dunn (Projects Librarian, MIT Libraries)
<khdunn@mit.edu> http://libraries.mit.edu/scholarly 🍫
**Rumors from page 6**

Tony Ferguson and his lovely wife Cheryl attended the Fiesole Retreat and we had a great time tramping around St. Petersburg as well as listening to the wonderful papers. Tony did his usual wonderful wrap up of the Retreat and gives us a glimpse in his Back Talk, this issue, p.86. Tony has retired from HKU but is still very active in lots of library venues, including OCLC. Tony’s personal email address is <anthony.ferguson185@gmail.com>. He has relocated to Sahuarita, Arizona. Talk about going around the world! Tony’s mother is turning 90 during the Charleston Conference so he will not be coming unless we can persuade him. In the meantime, the super Scotsman Derek Law will be summing up for the 2011 Charleston Conference.

Oh! The new Librarian at HKU is Peter Sidorko: <peters@hkucc.hku.hk>. Look forward to having him in Charleston some day soon!

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**Purchasing Options in Patron-Driven Acquisitions**

by Robert Johnson (Clinical Services Librarian, USC Norris Medical Library) <robertej@usc.edu>

**The Basics**

Patron-Driven Acquisitions (PDA) is a model of purchasing in which the librarians set the parameters of purchase and patrons pull the trigger. The material selected by patrons is appropriate to the collection because of the parameters set in place by librarians, and it is important to the collection because patrons themselves select it. This method of collection development can be thought of in many different ways: as a cost saving measure, supplement to interlibrary loan, method to increase electronic content, an alternative to traditional collection development, etc. At UCI, we primarily wanted to know if we could achieve cost savings and still provide robust access to content. Though print PDA options exist, most discussion of PDA centers on delivery of electronic content, which I’ll focus on here. I won’t try to describe which is “best,” mainly because these models are extremely flexible and customizable based on your institution’s needs, and each institution has differing needs and goals that may be met differently by specific vendors. Also, these models are changing and evolving constantly and the options/customizations I mention here may be different tomorrow.

The UCI Libraries investigated PDA beginning in 2009 and implemented a limited PDA pilot in late 2010. We looked at four vendors and developed questions to compare them to one another. In order to create a list of questions to address as many aspects as possible, UCI assembled bibliographers from arts and humanities, social sciences, sciences, technical services, and acquisitions. Making sure to include both subject specialists, technical service specialists, and acquisitions specialists was important as we could tackle not only the collection development aspects of this project, but also technical aspects subject librarians would not have thought of (such as the level of cataloging, how easily we could integrate these records into our OPAC, how invoicing works, etc.). We reviewed the available literature and contacted authors to get some first-hand accounts of the process. Then we began examining two years of usage data (both circulation and internal use counts) for material from specific publishers. Armed with this knowledge, we came up with a list of questions to ask vendors (for the full list, see Sue Polanka’s blog No Shelf Required: http://www.libraries.wright.edu/noshelfrequired/?p=415). I expected to see established packages from each vendor, but instead, we were presented with four companies very willing to customize based on our needs. The most important thing an organization can do prior to investigating these models is to determine what it wants out of PDA. Cost savings, ILL alternatives, beefing up electronic content, and/or altering responsibilities for collection development librarians are some reasons for interest in PDA, and each of those reasons will change the customization you seek.

Based on our investigations, here are some issues to consider when setting up a PDA program.

**Access**

Vendors are offering single-user (one user at a time), multiple-user (some predefined number of simultaneous users, up to unlimited), and even two-user options. Pricing for these models varies: some vendors are charging hardcover price for single-user and 1.5 times hardcover price for multiple/two-user options (depending on how many concurrent users your institution wants). Some pricing begins at 1.5 times hardcover with single-user and increases for multiple/two-user. For institutions trying to provide access to popular or high demand works, multiple-user makes the most sense (lots of patrons wanting access at the same time). For academic disciplines, single-user might make the most sense, as patrons are less likely to cluster at the same time.

Another access concern is the platform, whether that means a downloadable e-reader (which can be difficult to manage if you don’t have a robust IT department) or a handheld device (for example a Kindle, Nook, Kobo, or iPad). A platform is the electronic framework in which the content lives, and some platforms require users to download programs or readers to allow the user to read the content. If the content requires a specific platform, this can cause difficulty when users attempt to access this content from different environments (if their computer doesn’t support Java or Flash, for instance). There are also differences in what

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Before Katina’s call for this issue’s articles crossed my desk I was working on a piece that began by considering Buckeyes — a breed of chicken developed by Nettie Metcalf in Warren, Ohio in the nineteenth century. (I’m also told there’s a third-rate collegiate sports team by the same name in the area, but I’ve yet to verify that.) At any rate, we’ll get back to the Buckeyes in my next contribution.

This issue is devoted to the topic of patron-driven acquisitions. So, for what’s they’re worth, here are my thoughts on the subject.

First, “patron-driven” is not a new idea. For many libraries, patron requests have long been a part of the selection and acquisitions process. Moreover, responsible collection development librarians take their communities into account and seek to build solid, well-rounded collections to anticipate and meet the needs of their constituencies.

Some will argue that it is impossible to predict what people will actually request, and that building collections “just in case” is frivolous in today’s world of limited budgets. I’ll return to the “just in case / just in time” issue shortly.

The current discussions about PDA have evolved from the ability, rendered by technology, of enabling patrons to “discover” potential content that a library has yet to purchase, license, or subscribe to. This in and of itself is all well and good. I have no real argument with the next step, that of allowing patrons to indicate their interest in, and thereby nominating a given item for potential acquisition. Again, all well and good.

I do take issue with the notion, espoused by some, of abdicating all responsibility for selection and allowing the process to devolve completely to those within a given library’s community who are active with this technology. To do so violates many things: the rights of those who are either not engaged with the technology or choose not to make use of it, the library’s responsibility to ensure some balance in its collections, and the validity of those subjects which may simply not be in vogue at present.

Library budgets are woefully inadequate. There is simply no way most libraries can provide everything their customers want. Some effort must be devoted to assigning priority to what will be purchased.

Moreover, PDA by its nature will favor those formats that readily allow its application. Some might argue that if usage of eBooks equals or exceeds that of print, perhaps a library’s budget is most appropriately spent predominantly on e.

Ah, but here’s the rub: not every monographic title is available as an eBook. Most publishers I’ve talked with about this recently (including Oxford University Press, Cambridge University Press, the University of Minnesota Press, the University of New Mexico Press, Brill, Wiley, Taylor & Francis, Springer, Gale/Cengage, and Elsevier, to name but a few) indicate that moving forward they intend to make most books available both as print and e (the most notable exceptions being those titles where permissions, e.g., for illustrations make a digital edition problematic). Moreover, the historical practice of embargoing e-content for some period of time has also largely disappeared; in general print and e are available more or less simultaneously.

However, for the foreseeable future a certain body of the literature is not likely to see the light of day as e. The reasons for this are various, but the fundamental reality is that there is not now, and there will not be for quite some time to come, a complete one-to-one correspondence between print books and eBooks.

This brings me back to “just in time.” Technology is also reshaping the way publishers, as producers of a physical product, go about issuing their wares. Print-on-demand already satisfies a notable percentage of the call for print books, and it’s a pretty safe bet that percentage will continue to increase as time goes by.

For many publishers the formula these days works like this: the first printing is still produced using offset presses, simply because the per unit cost is substantially lower than POD. Moreover, although POD quality has improved enormously since the early days of the technology, it’s still not equal to what offset can offer. Like many new technologies, POD has gotten cheaper, better, and more reliable. For content that’s just text, good enough is probably good enough.

Publishing has historically been a conservative industry; one that embraced change only when forced to do so. This is changing. The old assumptions about print runs, inventory, and distribution channels have all been challenged and re-written. The idea that a text will be developed but not in fact delivered until someone actually orders it is already with us. For anyone who worries about maintaining an inventory, this is great news.

My concern revolves around the content that is no longer viewed as making commercial sense. Sure, the costs of hosting some data are a fraction of what’s involved with printing, storing, and shipping real books, but the editorial costs are still there. Publishers have to look at everything involved in the cycle.

Some will point out that this process of market de-selection will happen regardless. They’re right. But that doesn’t mean we’re the better for it. To me it heightens the shallow, insubstantial nature of our interaction with so much in today’s world.

But back to patron-driven acquisitions: the idea of giving library users another easy and efficient tool to nominate content for acquisition is great. It’s also a pretty simple affair. Really, at the end of the day much more ado about this is much ado about nothing.
do similar tasks — for instance, we have many volunteers that do outreach and press support, and we also have a small team of people at the Foundation who answer press inquiries — we have a culture of working together quite closely, with shared issue tracking systems, mailing lists, and so on. A large amount of “Foundation” work is actually done by volunteer community members, and there is an expectation of transparency and public sharing of information that would be quite radical for many organizations — but we just think of it as the Wikimedia way.

The Foundation has grown from a shoestring organization with no paid staff at the beginning, to now having around 70 employees, but we still feel that we’re barely scraping the surface of what could be done. For a long time, our staff has just scaled to meet the increased technical needs of the projects as they have grown; we are just now beginning to explore doing more outreach work at the Foundation. Our vision is “Imagine a world in which every single human being can freely share in the sum of all knowledge” — that’s pretty ambitious. And we are well aware that Wikimedia only exists because of the work done by the multi-faceted, international volunteer community — the community is the heart and soul of our movement.

**ATG:** Can we expect an update of your book “How Wikipedia Works” any time soon?

**PA:** I would love to at some point, but I don’t have any plans (or any time) to update it right now — however, the book is released under the GFDL, which is a free license, so other people are certainly welcome to update it! In addition to my book, there are other newer educational materials available at [http://bookshelf.wikimedia.org](http://bookshelf.wikimedia.org).

**ATG:** If you had a crystal ball, where would you see Wikipedia and the Wikimedia Foundation in five years? What would you see your role as then?

**PA:** We just completed a strategic planning project that mapped out the direction for the next five years of the Wikimedia Foundation and movement, through 2015; this was a massive community effort, with a thousand community members contributing to building the plan. So coming out of that, our goal for the next five years is to radically increase our editing community, particular in areas that are currently underrepresented — for instance, we want to get more female editors, and more editors that are from parts of the world where large portions of the population are newly online, such as India and Brazil.

More editors will lead, we hope, to increasing articles in languages where there are millions of native speakers, but comparatively very little material online (and where the Wikipedia version is still small), such as Hindi and Arabic. More articles means more readers means more editors — it’s a virtuous circle. And finally, we want to increase article quality across all languages.

In five years, I hope that everyone will not only use Wikipedia, but will think of it as a living project that they participate in, have a stake in, and can make better. With the growth of Wikipedia over the last ten years, I have been privileged to have been a part of one of the most extraordinary social movements and reference projects to ever exist, and I would love to share that with everyone.
We told you about Jill Em- cery's pregnancy? Well, here’s a photo of Pearl Rose Hodges. Pearl, who was born April 26, weighed 6 lbs, 3 ounces and was 19 inches tall, and took her dad’s last name. And on June 9, Jill, husband, Dennis Hodges, and Pearl set out for Portland, Oregon where Jill will start a new job as the Collections Librarian at Portland State University on July 1. Jill says they are looking forward to the more temperate summer plus being in the most bicycle friendly city in the U.S. Personally, Jill says, she is very excited to be joining the faculty at Portland State University and hopefully getting to work with the Orbis-Cascade Alliance.

And, speaking of the Orbis-Cascade Alliance, see the article in this issue Building a Demand Driven Consortium eBook Collection by Emily McElroy and Susan Linken.

John Riley sent me several great reports from various conferences, especially BEA. Unfortunately, there was not enough room to print them in the June ATG so we are putting them online rather than holding them for the September print issue. Meanwhile, John Riley will be running the ALA breakfast in New Orleans since I will not be there. Am attending a family reunion where I will be bidding goodbye to my son and his wife and my two grandchildren! Sob! My son is heading for Bogota, Colombia, on June 30, where he begins a new assignment in his life of an Army Major. They will be gone for two years!

Speaking of ALA in New Orleans — Knut Dorn — the legend — will be retiring. Be sure and wish him well! Tina Feick has promised an interview with Knut, so ask her when we can expect it when you see her in New Orleans. Actually, just learned that the 100th Deutsche Bibliothekartag (German Librarians' Day) takes place just before ALA, on June 7-10, and the theme is “Libraries for the Future — The Future of Libraries.”

Speaking of retirement, was surprised as well as pleased to see J.J. Waldsorf's name on my telephone screen the other day! Jack says he is interested in publishing a collection of his book buying, book store, book selling and book collecting articles which he has written over the past 40 plus years. He noted that he has been rereading his ATG articles and finds that they are not dated and the content is still of interest. Have ‘ya all read the articles lately? I have been looking over them myself and Jack, as always, is correct.

News from another retiree — Tom Gilson. Tom retired as Head of Reference at the College of Charleston Libraries but Against the Grain has scoffed him up since he wanted something else to do! Tom will be working with ATG as an associate editor and is already responsible for several interviews in this issue — Deborah Kahn and Phoebe Ayers. We welcome Tom back to the world of the working!

Connie Foster who is not retiring bless her heart, was just at her son’s wedding in Tybee Beach near Savannah, GA! How exciting! Did you see her profile on the ATG NewsChannel at www.against-the-grain.com?


Speaking of which, I don’t have enough room to finish the rumors so I guess they are finally pushing me to the Internet. See the rest of Rumors at www.against-the-grain.com!