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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/nosheffrequ/?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