11-9-2012

Yet Another PDA Presentation

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Citation of this paper:
Rykse, Harriet; Adlington, Janice; Kliever, Julia; and Swords, David, "Yet Another PDA Presentation" (2012). Western Libraries Staff Presentations. Paper 32.
http://ir.lib.uwo.ca/wlpres/32
Yet Another PDA Presentation!

Harriet Rykse – Western University
Janice Adlington – McMaster University
Julie Kliever – Providence College
David Swords - EBL

Lively Lunch – November 9
Charleston Conference 2012
Why are we here?*

• Co-presenting by chance, but connected by principle!

• Patron-driven acquisitions access

*DISCLAIMER: This Lively Lunch will NOT explain the Meaning of Life.
Western’s Experience
Who are we?

- Doctoral Medical University
- 35,000 undergraduate and graduate students
- Located in Southwestern Ontario, Canada
PDA at Western

• First PDA pilot in 2008 with EBL
• PDA with OCUL consortium in 2010
• Second PDA trial in 2010-11 with Ingram
• PDA as part of regular acquisitions workflow in 2012
### Assessing Value

#### EBL Pilot

<table>
<thead>
<tr>
<th>EBL Pilot</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Period Run</td>
<td>June 2008 to April 2009 (10 mos)</td>
</tr>
<tr>
<td>Records loaded</td>
<td>8,800</td>
</tr>
<tr>
<td>Total purchased</td>
<td>377</td>
</tr>
<tr>
<td>Total spent</td>
<td>$33,317</td>
</tr>
<tr>
<td>Average cost per book</td>
<td>$88</td>
</tr>
</tbody>
</table>
Assessing Value
OCUL Pilot – consortium perspective

<table>
<thead>
<tr>
<th>OCUL consortium Pilot (16 schools)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Period Run</td>
</tr>
<tr>
<td>Records loaded</td>
</tr>
<tr>
<td>Total purchased</td>
</tr>
<tr>
<td>Total spent</td>
</tr>
<tr>
<td>Average cost per book (based on school size)</td>
</tr>
</tbody>
</table>

For a full description of this project see:
(http://www.sciencedirect.com/science/article/pii/S0098791312000810)
### Assessing Value

**OCUL Pilot – Western’s perspective**

<table>
<thead>
<tr>
<th>OCUL consortium Pilot</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Period Run</td>
<td>Sept. 20 - 28, 2010</td>
</tr>
<tr>
<td>Records loaded</td>
<td>38,000</td>
</tr>
<tr>
<td>Total purchased</td>
<td>169 unique to Western (out of total 467)</td>
</tr>
<tr>
<td>Total spent</td>
<td>$15,000 for Western to participate</td>
</tr>
<tr>
<td>Average cost per book (counting only 169 unique titles)</td>
<td>$89</td>
</tr>
<tr>
<td>Used at least once between Sept. 2010 and March 2012</td>
<td>63%</td>
</tr>
</tbody>
</table>
Assessing Value
Ingram Pilot

<table>
<thead>
<tr>
<th>Ingram Pilot</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Period Run</td>
<td>June 2010 – May 2011</td>
</tr>
<tr>
<td>Records loaded</td>
<td>3894</td>
</tr>
<tr>
<td>Total purchased</td>
<td>484</td>
</tr>
<tr>
<td>Total spent</td>
<td>$46,000</td>
</tr>
<tr>
<td>Average cost per book</td>
<td>$96</td>
</tr>
</tbody>
</table>
Assessing Value
Ingram PDA ongoing

<table>
<thead>
<tr>
<th>Ingram PDA ongoing</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Period Run</td>
<td>May – October 2012</td>
</tr>
<tr>
<td>Records loaded</td>
<td>4226</td>
</tr>
<tr>
<td>Total purchased</td>
<td>283</td>
</tr>
<tr>
<td>Total spent</td>
<td>$29,197</td>
</tr>
<tr>
<td>Average cost per book</td>
<td>$103</td>
</tr>
</tbody>
</table>
Tales from the crypt

- Duplicating content – (2 copies of an e-book on two platforms)
- Inappropriate content (e.g. recipe books and popular non-fiction)
- User’s desire for print AND electronic
- Change in collection philosophy – combating the desire to purchase PDA titles
Best Experiences

• Broad access to material
• Invoice after purchase
• Minimal duplication
• Use of existing subject profiles
• Weekly load of records
McMaster’s Experience
Who are we?

- Doctoral Medical University, ARL Library
- 26,000 FTE
- Located in southern Ontario, Canada
PDA at McMaster

• Early EBL adopter: in production, January 2007-

• Consortial PDA pilot with Ebrary, fall 2010

• Current: EBL profile revision, YBP/Ebrary discussion
Why PDA?

- 2006: monograph budget cut by half
  \$1.2 million $\rightarrow$ \$600,000

- STLs allow us to offer a broader collection than we could purchase

- Purchase only titles with demonstrated use
GO BIG!

But..................................
## Assessing value: EBL

<table>
<thead>
<tr>
<th>EBL</th>
<th>Autopurchase</th>
<th>Short Term Loans</th>
<th>TOTAL COST</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td># of Titles</td>
<td>Cost</td>
<td># of Titles</td>
</tr>
<tr>
<td>May 2007 to April 2008</td>
<td>69</td>
<td>$7,716</td>
<td>2144</td>
</tr>
<tr>
<td>May 2008 to Jan. 4 2009</td>
<td>165</td>
<td>$18,532</td>
<td>3512</td>
</tr>
<tr>
<td>PROFILE REVISION</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>July 2009 to April 2010</td>
<td>462</td>
<td>$42,783</td>
<td>3196</td>
</tr>
<tr>
<td>May 2010 to April 2011</td>
<td>188</td>
<td>$16,922</td>
<td>3148</td>
</tr>
<tr>
<td>May 2011 to April 2012</td>
<td>164</td>
<td>$16,567</td>
<td>2252</td>
</tr>
</tbody>
</table>
Assessing Value: Post-Purchase Use

Number of Titles

Number of Unique Users

Users per title
Assessing Value: EBL Concerns

• Mediated loans: work for collections staff
• Duplication
• Interaction with faculty selection
• Weeding the PDA
OCUL Consortium PDA with Ebrary

At McMaster

- 42,000 EBL records removed
- 38,000 Ebrary records added

- Ebrary trial ran until the allocated funds had been spent: ONE WEEK
## Assessing Value: Post-Purchase Use

<table>
<thead>
<tr>
<th></th>
<th>2011</th>
<th>January-June 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Used, all titles (n=467)</td>
<td>272 (58%)</td>
<td>169 (36%)</td>
</tr>
<tr>
<td>Triggered by McMaster (n=122)</td>
<td>99 (81%)</td>
<td>72 (59%)</td>
</tr>
</tbody>
</table>

**Cost:** $10,000
Issues with Consortial PDA (Crypt Tales)

- Everything Harriet said

AND

- Some local surprises: superseded medical texts
- Lasting concerns about purchase triggers
Best PDA Experiences

• Providing content we would never have known to select – e.g. brewing, enology

• Flexible loan and purchase options

• Smooth processes: following initial hiccups
Tales from the Crypt

$$$

• Profile to match the budget, or budget to match the profile

• Mediation process causes delay, user confusion
More Tales From the Crypt

- Pay a premium over list price for three loans + purchase
- Faculty in some departments unhappy with e-books in general
PDA Desiderata – All Platforms

Our top wishes:

• Higher purchase triggers: more than 10 pages
• Flexible options including mediated loans
• Integration with approval plans
• Detailed usage reports
Desiderata for our Users

Top wishes for patrons:

• Ability to download texts to their devices
• Clear communication of print and copy limits
• As little DRM as possible: the web is our competitor!
Providence College’s Experience
Providence College

Who are we?

- Located in Providence, Rhode Island
- Dominican Catholic liberal arts school
- Primarily undergraduate
- Approx. 4200 FTE
- Part of the HELIN Library Consortium
Providence College

Who are we?

• Located in Providence, Rhode Island
• Dominican Catholic liberal arts school
• Primarily undergraduate
• Approx. 4200 FTE
• Part of the HELIN Library Consortium
Why did we become interested in a PDA program?

Our interest arose after an unsuccessful attempt to establish a PDA program for all HELIN consortium members:

We all **share** the same catalog.

Consortium members **could not come to a consensus** on what to offer or how to offer it.
What did we want out of a PDA program?

**Maximum access with minimal commitment.**

Fall 2010 - Vendor interviews:
What did we want out of a PDA program?

Maximum access with minimal commitment.

- Our choice? SHORT TERM LOANS! Only EBL was offering this at the time.
- Left us the option to walk away, and not have to pay perpetual hosting fees, if it didn’t work out.
How we do it:

- Patrons are allowed access to entire EBL catalog – no selection profile.
- NO purchase trigger. Books are loaned, never purchased.
- Patrons can browse title free for 10 minutes.
- After 10 minutes, patron is asked if they want to create a loan.
- Patrons can also opt to download the title.
Assessing value – fee schedule

24-hour loan: 5% of purchase price
7-day download: 10% of purchase price
14-day download: 15% of purchase price
Assessing value - factoids about usage

Data sample - May 1 2011 through Oct 1 2012 (18 months)

- Average cost per month: $439.00
- Costliest single month: $831.85 (Aug 2012)
- Average # of unique titles per month: 53
- Highest # of unique titles in 1 month: 109 (July 2011)

- Trigger set to notify if a book is selected more than 3 times. We’ve only received this notification a handful of times.

- 572 unique downloads. 108 unique read online. 288 unique browse online.

- **Cost comparison: sample of 20 titles chosen**
  - Short Term Loan cost: $139.28
  - Purchase cost would have been: $812.81
Assessing value – what’s being used?

WORDLE weighting of all subject headings of all books browsed online, read online, and downloaded from May 1 2011 through Oct 1 2012.
Promotion and marketing:

Spring 2011 – soft launch

Summer 2011 - Marketed to Faculty

Fall 2011 - Marketed campus-wide.
“Tales from the crypt” AND “best experiences” – together!

- **NO CATALOG ACCESS**
  Logistical (not technical) problems loading non-owned titles in shared HELIN consortium catalog.
  This is BAD, as patrons must be directed to EBL
  This is “GOOD”, as it helps reduce random browsing.

- **LOGINS MUST BE ADDED**
  We did not have an authentication method that both PC and EBL could use.

- **EBL USED AS AN ALTERNATIVE TO INTER LIBRARY LOAN**
  ILL staff first looks for a requested title in EBL before requesting from another library (Faster and cheaper than hardcopy ILL).
Vendor’s Perspective

• Progress in PDA: 2010-2012
• PDA and Consortia
• Access vs Ownership: STL Magic
What are YOU doing with PDA?

• What’s worked, or not worked, for you?

• Does faculty care? Do they even know they are choosing Library purchases this way?

• Are there any other vendors present who care to comment?
So to wrap it all up....*

• An ongoing process!
• We can’t present a “here’s our success story, and we’re done” ending to our PDA projects.

*DISCLAIMER: This Lively Lunch will NOT wrap up PDA with a pretty little bow.
We are:

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**Julie Kliever** – Providence College  
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**David Swords** – EBL  
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