

# **CUSTOMER-BASED COLLECTION DEVELOPMENT**

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# **CUSTOMER-BASED COLLECTION DEVELOPMENT**

*An Overview*

EDITED BY  
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# 1

## E-Books and Patron-Driven Acquisitions in Academic Libraries

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**P**ATRON-DRIVEN ACQUISITIONS (PDA) IS THE HOT-TOPIC COLLECTION development model in academic libraries. Libraries are enthusiastically adopting the model, and librarians are just as enthusiastically reporting the successes and challenges of implementing the model at their institutions. Google Scholar lists over 2,000 results made available online since 2009 for the search “college libraries patron driven acquisitions.” EBSCO’s *Library Information Science & Technology Abstracts with Full Text* database also lists over 400 articles published since 2009 found using the search terms “college libraries patron driven acquisitions.” Even though the user request model, such as acquiring items at the suggestion of faculty and students, is currently used to purchase print materials and has been used in the past to develop collections, the PDA model for e-book purchasing is driving further paradigmatic changes in academic library collection development.

The benefit of patron-driven collection development of e-books for librarians is that it shifts the buying emphasis from the just-in-case model, where items are purchased in the hope that patrons will find them and use them, to the just-in-time model, where patrons search for and access requested items directly. The benefit to patrons of adopting such a model is the ease of access

to information. Patrons find records of possible e-book purchases integrated within the library catalog itself. The patron can use the library catalog as they would use Amazon or Barnes & Noble to search for e-books. Patrons can then access the e-books immediately, with no mediating ordering process required. However, e-books carry their own restrictions that can affect patrons' access. Like the Digital Rights Management (DRM) issues that restrict Amazon or Barnes & Noble e-book purchases to specific e-reader devices, DRM e-books purchased through library vendors can usually only be accessed through proprietary websites. These websites may not be accessible on mobile devices. They may also not include accommodations such as font size control or text-to-speech functions for the visually impaired. Preservation of e-book collections can also be a concern if budget issues require cancelling an e-book subscription.

The interlibrary loan of e-book collections is also an issue, since DRM usually restricts or prohibits duplication or loans of items. While implementing PDA of e-books, librarians should become familiar with the challenges e-books present to traditional services provided by academic libraries, and the various software and log-ons users will need to read downloaded e-books on their computers and mobile devices, as well as being aware of the preservation issues facing institutions that purchase large collections of e-books.

## **THE CHANGING COLLECTION DEVELOPMENT FOCUS OF THE ACADEMIC LIBRARY**

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The academic library has been experiencing a process of change in focus for the past four decades, and this change in focus has not only followed inevitable changes in academic curricula and research interests on campuses, but has also followed the changes in technology that have transformed the ways that users access information. At the mid-twentieth century, academic libraries were charged with creating substantial research collections to meet the needs of their users. Since the 1990s, academic libraries have increasingly focused on services and instruction to their users in the face of ever-decreasing acquisition budgets as well as the decreasing amount of space on shelves available for the housing of collections. PDA and its particular application to e-book collection building is another response to the various pressures on the academic libraries to make appropriate and justifiable purchases: books and materials that will be used by faculty, staff, and students. This is no longer a question of acquiring a substantial print collection that supports an institution's curricula; it is a question of providing users access to information in the most accessible and least costly format available. The focus on development of e-book collections also addresses the need to repurpose areas of the physical



library building for information commons that include computer labs, media centers, and makerspaces.<sup>1</sup> A brief history of the changing landscape of the academic libraries will show how patron-driven acquisition of e-books fits into the development of the academic library as a campus institution.

After World War II, universities grew substantially due to the increased enrollment of students under the GI Bill. With the expansion of curricula and the student body, academic librarians invested in building their collections along a “postwar ideal . . . to build a research library to meet the needs of existing and future patrons.”<sup>2</sup> This just-in-case collection development model placed the responsibility of identifying materials for acquisitions on subject specialists. These librarians would purchase materials with the funds allotted to them in the hope that users would identify them through the library catalog and then check them out. Subject specialists would keep their faculty informed about current acquisitions in their subject areas to encourage use of the collection, and reference librarians would assist faculty and students in locating items while using the library’s catalog.

Over time, this model of collection development became increasingly untenable as academic libraries began to sustain budget cuts that decreased their purchasing power. Libraries analyzed the use of their collections to make better use of their diminishing purchasing funds. Researchers made an interesting discovery: most items purchased along the just-in-case model had never circulated. The seminal University of Pittsburgh study of use of library materials showed that a “very small portion (perhaps 10%) of the library collection of book titles accounts for the major portion (80% or more) of the circulation and in-house use.”<sup>3</sup>

With fewer funds to purchase materials, libraries could no longer justify the expense of books purchased that were never circulated. Coupled with the lack of use of most print collections was the decreasing amount of space to house print collections, even after libraries weeded collections to remove old, damaged, and superseded items, and moved sections of their retained collections to off-site storage facilities. Even with vendor approval plans in place to streamline selection of materials for purchase, academic libraries were spending far more on print materials than were actually circulated or browsed, and oftentimes budget cuts required the suspension of automatic purchasing of items covered by the approval plan.

## **JUST-IN-TIME COLLECTION DEVELOPMENT: FROM USER REQUESTS TO PDA OF E-BOOKS**

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Considering user input on acquiring materials is not a new concept in academic libraries. Academic libraries have relied on lists generated from interlibrary

borrowing requests for years, and subject specialists responsible for purchasing of materials in their liaison areas have received requests for titles from their faculty and students. The requests in the past have been for print or other physical materials: books, specific government documents, DVDs, CDs, and so on. Users identified a needed information source by searching for a specific title in a library's catalog. If users could not find or access particular items through their library, they then either contacted their library subject liaison to request items for purchase, or contacted their interlibrary loan office to borrow items from another institution. Libraries have also used interlibrary loan (ILL) request records as title lists for print acquisitions. When placing requests through automated ILL systems, users would designate whether titles were recommended for purchase. Subject librarians would review the list of recommended items and then would make their purchases. But this process of purchasing items requested through ILL not only addressed users' need for information after the fact, it also required the library to fund acquiring of the items twice, once by filling the ILL request, and again by purchasing the items.<sup>4</sup>

Libraries then began experimenting with directly purchasing items requested through ILL. Items requested through ILL that met specific criteria would automatically be purchased for inclusion in a library's collection. Criteria for automatic purchase of ILL requests included coverage of designated subject areas, currency, appropriate target audience, and price.<sup>5</sup> Subject specialists assessed and evaluated the direct purchase of ILL requests and found that the items purchased during their experiments were circulated more often than items purchased either by established approval plans or through traditional collection development models.<sup>6</sup> And yet even with this better demand-driven acquisition model in place, users were still required to mediate their access to information sources through ILL.

As users have become more used to the immediate information search and access model provided by Google and other Internet search engines, they have also become less patient with accessing information in print format in academic libraries. Accessing information in print requires users to visit the physical library. Accessing information in print also requires users to become familiar with the organization of physical materials within the library. Many undergraduates who approach the reference desk for research assistance have never located a book on a library shelf using a call number, and busy graduate students and faculty find the lack of older journal articles and books in electronic format an annoyance. If the need for the information in a print source is great enough, users will plan to visit the library, go to the stacks, and find their books. But most users will resist following through with print items. The inconvenience of lacking immediate access to electronic information sources is greater than making the effort to fulfill the information need with a print

source. Even with the implementation of book and document delivery plans, with books from the library's collection and journal articles from print journals photocopied and delivered to faculty, staff, and graduate students on university and college campuses, users would prefer the ease of finding and accessing information online.<sup>7</sup>

The adoption of e-book PDA is a response to changes in collection use, the information needs of users, and the needs of libraries to adapt to budget and space concerns. When implementing an e-book PDA model, libraries set up an allocated budget for their e-book program and work with their vendors or with specific e-book vendors, such as ebrary or EBL, to load e-book PDA records into their catalogs.<sup>8</sup> Users can discover these e-book PDA records as they search the catalog or discovery service. If a user decides to click through to view a PDA e-book, the act of clicking through either triggers the purchase of the e-book outright or triggers a short-term loan of the e-book, where the cost of the short-term loan is a percentage of the full cost of the book based on use.<sup>9</sup> The entire process of purchasing the e-book takes place behind the scenes, with users unaware that their search and browsing behaviors have contributed to the development of their library's collections. The process is designed to be seamless and to require no mediation: no subject librarians or ILL staff members need to be contacted to ensure purchase of an e-book that a user wants to access. The just-in-time collection development model is epitomized by this approach to e-book purchasing: the books are only loaned or purchased at the user's point of need. Requiring more physical space to house purchased e-books is not an issue.

The PDA e-book model and purchasing process, "where a user request triggers a purchase, by definition yield a 100 percent circulation rate."<sup>10</sup> Each book purchased through e-book PDA is used, unlike print items purchased in just-in-case models, which resulted in the low use of expensive print collections. However, even though e-book PDA does address the collection development and collection use concerns outlined in this chapter, this collection development is not foolproof, and the added issues surrounding the purchase of e-books must be considered before a decision is made to implement e-book PDA extensively in an academic library.

## **BIBLIOGRAPHIC AND ELECTRONIC ACCESS ISSUES: THE CASE OF THE DISAPPEARING RECORDS**

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Budgeting issues may arise with an e-book PDA implementation. A library may find that users quickly download e-books within their PDA records pool and thus spend their allotted PDA budget faster than anticipated. For example, during the e-book PDA pilot at the author's library, the PDA budget was

very quickly spent by users clicking through PDA records in the catalog and triggering loans and purchases. Once users exhausted the PDA e-book with their purchases, the catalog records of the PDA titles were suppressed in the catalog to prevent users from discovering them. Soon after the records were suppressed, a very confused faculty member approached the reference desk to ask why he could no longer access a title he had browsed a few days before. The reference librarian assisting the faculty member searched for the title in the catalog in vain; since the title had been suppressed, it was not listed in search results. It was as if the e-book record had vanished. The collection development team soon cleared up the confusion among the reference librarians and the faculty member was informed that the title was no longer available for browsing. The very same issue arose at the Ohio State University Libraries during their 2009 ebrary pilot.<sup>11</sup> After depleting the e-book PDA budget, they suppressed their PDA e-book records.

How does a library explain disappearing records to users? Of course, if a library has funds for further collection development after e-book PDA funds have been depleted, then the materials would be purchased to complete the faculty member's requests. But if such a funding is not available, how does one explain to a confused researcher a collection development process that was designed to be invisible and seamless? Even in traditional models of collection development for print items, users are unaware of the approval plans in place, the purchasing decisions made by subject librarians, and the entire budget allocation process for subject areas. The books appear on the shelves, and users either find them through browsing the physical titles or searching for them through the catalog. Loading e-book PDA records into the catalog confuses this process because the users have become the selectors without having knowledge of the processes of selection or the policies of collection development. Users cannot tell if a particular e-book is owned by the library or not by the information included in the record alone. When users deplete the e-book PDA budget, these records are pulled from the catalog, unlike the records of checked-out books or missing books, which usually state when items are checked out or missing in the simple item information. As William H. Walters notes in his review of patron-driven acquisition and the mission of academic libraries, the practice of shadowing PDA e-book records "is likely to reduce patrons' confidence in the library catalog, especially among students and faculty working on long-term projects."<sup>12</sup>

## **DIGITAL RIGHTS MANAGEMENT: LICENSING VS. PURCHASING**

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There is a contradiction in the term *e-book purchasing*. When libraries or individuals purchase e-books, they usually are not purchasing them in the traditional

sense, where an exchange of money for a print book occurs. The purchase of most e-books is actually the purchase of licenses for the use of e-books under the rules established by publishers and vendors. The digital technologies that most publishers use to protect their e-books from duplication, mass dispersal, and use on devices or platforms not permissible under contract are called Digital Rights Management (DRM).<sup>13</sup> DRM is included within an e-book's digital file, and it controls how many times an e-book can be checked out or downloaded by an individual; an e-book's circulation time (which may or may not align with a library's circulation policy for print items); onto which devices e-books may be downloaded; if pages from an e-book can be printed; if users can copy and paste information from an e-book into another document, and so on. DRM was designed to protect the rights of creators. However, the inclusion of DRM in e-book files limits the very use of the e-book, and thus requires libraries to modify their traditional lending and accessibility practices. Three major e-book DRM issues will be briefly addressed: accessing e-books on a variety of devices and platforms, the interlibrary loan of e-books, and the preservation of e-books.

## WHAT'S YOUR PLATFORM?

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Before discussing the various e-book platform issues users may encounter, a warning must be offered to readers: e-books and digital publishing are technologies that are progressing at such a rapid rate that any attempt to summarize platform- or vendor-specific software or websites will be out-of-date as soon, and oftentimes before, it reaches publication. However, as long as DRM remains the standard for preventing duplication of e-books or use of e-books across proprietary platforms, the information presented in this section should provide a general outline of strategies implemented by publishers and vendors to protect their digital books from unauthorized duplication and the scenarios that may arise when users attempt to download checked-out items to their computers or mobile devices.

For standard e-book checkout, vendors may require users to download and install third-party software applications, like Adobe Digital Editions, to read checked-out titles.<sup>14</sup> Adobe Digital Editions also requires users to sign up for an Adobe Digital Editions ID to log in to the application once it is installed. However, requiring third-party software applications to read checked-out titles may present logistical problems for on-campus users such as faculty, staff, and graduate students assigned workstations in offices. As standard practice to secure their computer and wireless networks, most academic institutions do not allow users to make administrative changes such as installing new software on their workstations. Users who require software installation must request service from their IT office. On the other hand, users are free to

install third-party software on their own computers, but they may take issue with the entire idea of needing to download a separate piece of software to check out a title. Users may also be hesitant to register at e-book vendor websites or third-party software vendor sites, and may also find having to remember yet another user name and password bothersome.

E-book applications for mobile devices such as the iPhone and iPad, Android phones and tablets, and the Amazon Kindle Fire are available.<sup>15</sup> Two vendors of e-books for academic libraries, ebrary and EBSCO, both require users to register for an Adobe Digital Editions ID.<sup>16</sup> Librarians must be aware of these requirements, and must make an effort to remain up-to-date on the rapidly changing technology requirements, to assist users wishing to view e-book titles on their mobile devices. Even though these applications are free, they do require the patience and willingness of the user to download, install, and log in to them to access an e-book. Considering that one of the e-book PDA model's benefits is to provide access to information quickly and at the user's point of need, the required mediation of third-party software creates obstacles to access. In a *New Library World* article describing possible effective business models for licensing of e-books in academic libraries, Schroeder and Wright briefly mention the issue of DRM and cross-platform compatibility of e-books: "Until users can download books to the device of their choice, they do not have free access to the libraries' purchased collections."<sup>17</sup> To expand upon Schroeder and Wright's point, until library users can download books to the device of their choice without having to register at various third-party sites and download applications, they still do not have free access to e-books purchased through any type of collection development model, PDA or otherwise.

## **E-BOOKS AND INTERLIBRARY LOAN**

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As academic libraries have changed focus from collecting print materials to providing access to information, lending and borrowing among libraries through interlibrary loan services have become an integral part of supporting the research needs of users. Critical to the entire enterprise of interlibrary loan has been the protected right of first sale of print items. The right of first sale allows libraries to circulate print books freely, not only to their defined user groups but also to users who request items through interlibrary loan. Once a library purchases a print book, it may dispose of the book according to the use and disposal rules of its institution. Unlike their print counterparts, the way libraries lend e-books beyond their stipulated user community is not protected by the right of first sale because e-books are licensed and not purchased or owned by libraries. Publishers have been reluctant to allow the loaning of e-books through interlibrary loan, fearing that the practice of lending

and borrowing e-books outside a library's user group will result in lost sales revenue. Libraries have responded by purchasing and short-loaning more e-book titles, but this approach limits not only what libraries can offer other institutions through ILL agreements, but what materials libraries can borrow from other institutions. Wicht describes alternatives to the traditional model of ILL when e-book ILL requests cannot be filled: short-term purchase (short-term loans), purchase on demand (PDA), print on demand, and consortium-level purchasing.<sup>18</sup> However, these alternatives are merely workarounds to the larger issue: e-book DRM's restriction of access.

## **PRESERVING E-BOOKS**

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Digital objects, like e-books, are frequently in danger of becoming obsolete or unusable due to changes in technology. In the e-book world, a number of formats have already become extinct, including Microsoft's .lit format, which was released in 2000 and discontinued in 2011.<sup>19</sup> Just as computers no longer come with floppy drives and .wps (Microsoft Works) files are no longer supported by current Microsoft Office packages, e-book formats and reader devices will modify and evolve, and these changes will require a library's purchased e-book collection to be migrated into a more current format, or to be accessed through emulation software that mimics the original software or hardware required to access the e-book.<sup>20</sup> Libraries will need to work closely with vendors to ensure that the e-books they have purchased will survive the inevitable changes in technology that will occur. Implementation of e-book preservation is lagging behind the established preservation efforts for electronic journals.<sup>21</sup> Portico, a digital preservation and electronic archiving service, is preserving e-books and provides a list of titles currently within its archive.<sup>22</sup> Kirchhoff notes that e-book DRM can complicate preservation efforts because "the purpose of DRM (carefully limit access and replication) is at odds with the purpose of preservation (preserve access for the long term)."<sup>23</sup> The very act of preservation of e-books itself is multifaceted, and not only must consider the possibility of format obsolescence, but also must ensure the library's access to vendor copies of e-books while maintaining consistent metadata at the item and collection levels to preserve discovery of e-books.<sup>24</sup>

## **CONCLUSION**

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E-book PDA in academic libraries can provide solutions to issues encountered as collection development evolves to meet the needs of users and the demands of institutional budgets. PDA addresses a user's need for information at the

point of demand, and e-books selected through a PDA program provide instant access to information. Increasing e-book purchases through PDA also obviates the space concerns many academic libraries have experienced. E-book PDA also guarantees that items purchased are used, another benefit of this collection development model that avoids the purchase of items that sit unused and uncirculated on library shelves. However, e-book PDA requires a reconceptualization of the library as a provider of access to information rather than a collector of information sources. Providing information access to users as needed by supplying them with e-books demands that the library give up traditional models of service to comply with licensing agreements protected by e-book DRM. E-book DRM limits not only services like interlibrary loan but also limits the manner in which users can download and access e-books on their computers and mobile devices. DRM also complicates preservation efforts. Even though e-book PDA seems to solve many library collection development issues just-in-time, it may cause more costly access and preservation issues in the future.

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