

**Getting  
Started with  
Demand-Driven  
Acquisitions  
for E-Books**

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# Getting Started with Demand-Driven Acquisitions for E-Books

A LITA Guide

Theresa S. Arndt



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*To my husband and my best friend, Donald,  
for the many years of constant  
and ongoing love and support  
he has given to me  
through all my endeavors.*

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## Introduction

When our library decided to investigate demand-driven acquisitions (DDA) for e-books in 2012 we started, as all good librarians do, by reviewing the professional literature as well as other sources. We found a few published case studies, and we also attended several conference presentations and webinar presentations. We had extensive conversations with various vendors. We combed the publications on e-books available at that time, which had some mentions of DDA. We found a body of literature on DDA as it had been used for print books which did provide information on the overall concept. The literature on e-book DDA was still emerging, and was less helpful in addressing the practical steps required to implement DDA exclusively with e-books. The problem was we didn't know what we might be forgetting to ask, because we didn't know what we didn't know! We also realized that decisions we made along the way might have unintended consequences later, but we weren't sure what those might be. What we really wanted was a list of all the many questions we should be asking ourselves and vendors, issues we should be considering, decisions we would need to make along the way. Such a list would be even better if it explained the implications of each choice. We also wanted some detailed, practical "how to" advice on how to get our DDA program up and running. In the end, we began creating our own "checklist" of questions that grew larger and longer the more we realized how much there was to consider and how many decisions we needed to make. This guide grew out of a desire to share this list of questions, decision points, and practical knowledge with other librarians who are interested in getting started with e-book DDA, and to help them think through the many choices that need to be made.

DDA has worked well for our library, increasing instant access to more e-books for our users, while holding down overall library book purchasing cost increases. We know that the DDA titles we end up paying for are all actually used, unlike the print and e-books that we buy based on profiling, alerts, reviews, librarian-selector judgment, and user recommendations alone. It has become an integral part of our overall collections strategy, although that strategy continues to include firm orders in print and e-book format for titles we consider “core” to our collection. This guide assumes a positive attitude toward DDA implementation, but potential problems are also pointed out. Although examples from the literature and from our small academic library’s experience are given for illustrative purposes, this guide is primarily intended to help you plan an e-book DDA program that is right for your library, by prompting you with questions which will help you make decisions. In this way, we hope to help other libraries shape DDA programs that are suited to local circumstances. Library missions and the population of library users they serve are variable, so the implementation will need to be customized. While much of the research literature on DDA comes from academic libraries, all library types are using DDA, and the questions posed in this guide will be relevant across library types, although the decisions and choices made by those libraries may differ.

As you work through the questions, remember that you probably will not be able to get everything you would ideally want in terms of e-book features, license terms, and pricing models, but some things will be negotiable. The e-book market and DDA models continue to evolve as publishers seek to meet the needs of the library market, while protecting their own need to make a profit. Ask for what you want, but be prepared to negotiate with flexibility by prioritizing your goals for your DDA program. There will also be various trade-offs in terms of staff time and direct dollar costs. This guide is intended to be practical. At times we will suggest that you consider doing nothing. Care and feeding of an e-book DDA program can eat up endless amounts of time if you let it, but some of the time spent may not be worth the small benefit gained.

Although it is divided into separate chapters, it is highly recommended that you read through the entire guide. There is overlap between chapters, but DDA programs are made up of a lot of different moving parts that are interrelated and discussed throughout the guide. For example, policy decisions will influence your ability to budget for DDA, and your choices of vendors will influence your workflow decisions. Unless you are running a one-person library, you will probably want to take a team approach to implementing DDA from the start. At our relatively

small library, two librarians, including a cataloger, as well as an acquisitions paraprofessional were involved in thinking through the various DDA setup decisions. It is our hope that this guide will help you go into DDA with more confidence and will help you avoid surprises.

What this guide does not do is provide a comprehensive overview of all e-book management issues libraries face, although these are touched on as they relate specifically to DDA. This guide assumes you already have some familiarity with providing purchased or subscribed e-books to your users, or will seek out the many excellent books on general e-book management to gain that knowledge (Kaplan 2012, Polanka 2012, Roncevic 2013).

Despite early concerns about e-book DDA, many libraries are now routinely and successfully using it. The National Information Standards Organization (NISO) DDA Working Group conducted a survey in August 2013 which garnered responses from 81 mostly academic libraries that used DDA, 56 for e-books only, and 23 more for e-books and print. The majority reported that their programs were effective and met the goals their library had set (NISO DDA Working Group 2013).

Most of the downsides of DDA that are raised are actually concerns about e-books in general, such as the timely availability of new titles in e-book format, the differential in cost between print and e-book versions of titles, digital rights management restrictions, simultaneous use concerns, turnaways due to simultaneous use limits, long-term preservation and access concerns, complaints about usability of e-book platform interfaces, accessibility for people with disabilities, and interlibrary loan restrictions. These are issues of concern with all library e-book acquisitions, and are important, but they are not specific to a DDA method. Other concerns relate to user behavior, such as a situation in which only one individual uses a single title many times, or one person is the only user of many titles. This sort of activity also occurs with any library collection, and is not specific to DDA. Every library has “frequent flyers” as well as potential users who, alas, never use anything from the library collection. At our library we would be delighted if every firm order title we purchased actually got used at least once by even one person, and we are also delighted to see a single user check out multiple books.

Throughout this guide variations in DDA programs are discussed, as the options offered by vendors are evolving in response to the library market. DDA for e-books is still an emerging service. The NISO DDA Working Group consisting of publishers, vendors, and librarians issued “recommended practices” for DDA in June 2014 (NISO DDA Working Group). These are not binding, but will help serve as

guidelines for libraries and vendors to find mutually agreeable and sustainable models for DDA in the future.

As with any rapidly evolving model, there are some variations in the vocabulary used for DDA. For consistency throughout this guide, one term has been chosen for each concept, and a glossary is included at the end of the guide with reference to some of the common synonyms that you may encounter.

# What Is Demand-Driven Acquisition, and Why Do It?

**D**emand-driven acquisitions (DDA) is a system for facilitating discovery of a title that the library does not currently own and, upon request, quickly buying it for the library collection and providing access to the user. Most often the term refers to monograph acquisitions, and it is alternatively referred to in the library literature as “patron-driven acquisitions” (PDA), “patron-initiated purchase of e-books” (PIPE), or “patron (or demand) -driven collection development.” Throughout this guide the abbreviation DDA will be used. Although DDA has been used by libraries for many years to acquire print books, the focus of this guide is exclusively on e-books, because that technology allows delivery that is truly “on demand” for the user. Many libraries use a “short-term loan” option prior to a DDA purchase, which will be referred to in this guide by the abbreviation STL.

In a sense, librarians have always practiced a form of DDA. Whether it was buying materials specifically recommended by users, titles that were widely and positively reviewed and thus likely to be requested, or books receiving a demand bump from celebrity endorsement, libraries have always reacted to the market force of user demand. As Barbara Quint recently put it, “Buying stuff somebody wants, instead of just what a vendor has plenty of . . . what a concept!” (Quint 2014).

There are many potential advantages of e-book DDA. Users can be provided with access to a much wider array of materials than the library could afford to purchase on a speculative basis, and their choices are not limited to books for which a librarian was able to predict interest. Because the e-book specifically chosen by the user can be delivered instantly, without waiting for an ordering process or

interlibrary loan delivery, there is increased library responsiveness to actual user needs. Traditional methods of collection development are often based on subject divisions, which may ignore emerging genres or interdisciplinary subjects that are of interest to users, but are unknown to librarians. Peripheral titles can be offered without risk that funds are wasted if they are not used. DDA can also be a more efficient way of providing access to a large variety of titles, by using a profile rather than labor-intensive title-by-title selection or selector approval of purchases. For subjects about which there are many published titles, but low predictability about which specific titles will be used, DDA can be a good solution. Even on a small scale, DDA can serve as a valuable supplement to other collection development activities.

YBP Library Service Inc.'s 2014 Annual Book Price Update on the titles their company profiles indicates that the majority of large publishers published more books than in the prior year, and the list price of books increased an average of 3.5 percent per year in the last ten years (YBP Library Services, 2014, [www.ybp.com/book\\_price\\_update.html](http://www.ybp.com/book_price_update.html)). It is becoming increasingly difficult for any library to keep up with such publishing trends through traditional acquisitions approaches. DDA provides the potential for budget savings by ensuring the purchase of only materials that are actually used at least once, and reducing the purchase of materials that are not used—a true “just in time” rather than “just in case” acquisitions approach. Since DDA typically provides some sort of limited “free” browsing time, users have the opportunity to evaluate the usefulness of a title, prior to the library spending money to acquire it. See figure 1.1 for a comparison of a traditional versus a DDA acquisitions workflow.

Underlying the DDA premise is also the assumption that books used by one, or a few, users are more likely to be used in the future by other users of the library, making it logical to purchase the books rather than just borrow them through interlibrary loan. Multiple studies by academic libraries using DDA indicate that materials acquired in this way are as likely or even more likely to be used in the future. The way to think about DDA is not as an additional cost burden, but as a way to spend your budget on things that are actually used. How much money is your library spending on books that are never used, even after many years in the collection? DDA seeks to prevent this money from being wasted. As a result of not buying unused books, some libraries find that DDA actually saves money on their overall book budgets, especially when implemented with an STL component that avoids paying full list price for a book used only a few times. The money saved through avoiding such expenditures can be reallocated to other acquisitions or library needs.

Traditional E-Book Acquisitions Workflow	DDA E-Book Acquisitions Workflow
<p>An approval plan profile (if used) is established with library service provider, other vendors.</p> <p>Alerts, vendor catalogs, and book reviews are consulted to select titles for purchase.</p> <p>Selection of individual titles is made by library staff.</p> <p>Titles recommended by users are considered for purchase.</p>	<p>A DDA profile is established with vendor(s), using subject and non-subject parameters, including a price cap.</p>
<p>As individual orders are placed, an order record is created in the integrated library system.</p>	
<p>Titles are received.</p>	
<p>Records for newly owned items are added to the catalog.</p>	<p>Discovery records for all profiled titles are added to the catalog.</p>
<p>Additional access points are established (e.g., in the library discovery layer).</p>	<p>Additional access points are established (e.g., in the library discovery layer).</p>
<p>Invoices are received and paid prior to any use.</p>	
<p>Title may or may not ever be used.</p>	
	<p>“Selection” by the end user occurs at point of need. Purchase is triggered only when the title is actually used; an invoice is received and paid following use.</p>
	<p>A point-of-invoice record is overlaid on the discovery record in the catalog. Included order data generates an order record in the integrated library system acquisitions module.</p>
<p>Titles remain available for possible future use, having already been paid for.</p>	<p>Titles that are triggered and purchased remain available for possible future use once paid for.</p>
	<p>Unused discovery records may remain available, with no payment required if no trigger ever occurs. Vendor(s) may remove titles from DDA availability. If funds for DDA are exhausted, DDA discovery records will be suppressed or removed from the catalog by the library.</p>

**FIGURE 1.1**  
Comparison of traditional vs. DDA acquisitions workflow

While setting up a DDA system will initially require a great deal of thought and time, it may provide savings of time in some areas of staffing. Depending on the exact approach and workflows you adopt, it can reduce time needed for title-by-title selection or acquisitions decisions, physical book processing, and invoice processing. This staff time can be reallocated for other activities and service offerings. However, DDA may require more staff time for setting up profiles with vendors and for ongoing catalog record maintenance.

- 
- What is your library's mission?
  - What is your collection philosophy?
  - What are the relative values you place on access vs. ownership?

The extent to which you rely on DDA is the extent to which you are willing to put the building of the library collection in the hands of your users. Collection philosophies of libraries run along a spectrum. If your library places more emphasis on access, you may take a more utilitarian approach to acquisitions, seeking to acquire primarily books that will be used in the near term by the users of your library. Ideally you will see a high percentage of materials actively being used in the very near future. Your library may place a higher reliance on subscription collections, lease plans such as McNaughton, and interlibrary loan. A DDA system that includes STL fits in well with this approach.

If your library's mission and philosophy place more of an emphasis on long-term local ownership of collections, you may seek to acquire materials that are considered important for the collection without concern for whether they will be used in the near future. This philosophy is that someone, someday may want the item, perhaps after the current librarians are long gone, and it presumes that traditional models of selection and collection are good at predicting what those future important works will be, since no library can buy everything. Within budget limits, this requires a tightly focused collection policy and clear criteria for what will and will not be purchased. DDA need not replace proactive acquisition approaches to collection development. It may be used as a supplement to traditional collection building, to acquire works that librarian selectors might miss, as well as to provide faster access to materials for users' immediate needs.

Many libraries today take a pragmatic approach to collection building, seeking to acquire, in advance of user requests, a core collection of books that are expected

to serve both short- and long-term user needs. Given the impossibility of predicting all user needs and interests, as well as a limited budget, the local collection is of necessity supplemented with interlibrary loan service. DDA with or without STL can provide an additional, effective tool for fast service to users and supplemental collection building.

- 
- To what extent are your current means of collection development fulfilling or not fulfilling your collection goals?
  - Are your current means of collection development adequately meeting all user needs in a timely fashion?
  - What percentage of published books, that are relevant to your mission, can your library actually purchase now?
  - Do you have librarians with both the time and expert knowledge to purchase in every area your users may be interested in?
  - Are all librarians able to devote sufficient time to collection responsibilities across all their areas of subject responsibility?
  - Might interdisciplinary subject areas or emerging genres be neglected by your current collection methods?

There are discussions in the literature that articulate concerns about DDA's potentially negative impact on library collections. One concern is that DDA will lead to an idiosyncratic collection. But most libraries already include some responsiveness to user requests or recommendations in their collection building methods, and even librarians are subject to individual preferences, biases, and limitations of knowledge. A study of five libraries found that DDA resulted in collecting that was much like that done by librarians. The DDA selections were "no more narrow, skewed, or individually focused" than those made by librarians selecting in a traditional manner (Price and McDonald 2009). Concerns about using STL within a DDA program are that these "selections" do not build the collection, but this is also what happens with interlibrary loan, only without instantaneous delivery. Presumably, if you are reading this guide, you have already decided that some level of DDA is appropriate for your library, and it is not the purpose of this guide to talk you out of it! However, thinking through potential concerns may help you both confirm your decision, and prepare to articulate your reasons for those in your administrative hierarchy and user base who may have questions or concerns.

- What do you hope to achieve by implementing demand-driven acquisitions?
- How important are each of the potential benefits to your library? What are your priorities?
- Do you want to maximize access to a wide array of information at the lowest possible cost, with less concern about adding to your permanent collection?
- Do you want to emphasize purchase of titles that are actually used, to build your permanent collection?
- Are you trying to save money, by reducing money spent on unused or lightly used books?
- Are you trying to maintain your current spending, but perhaps spend it more usefully?

6

While there are multiple benefits possible, it is helpful to identify your library's priorities for DDA. Your answer to these questions will influence the specific ways in which you implement and assess DDA at your library. Potential benefits include improved user service through fast delivery of a wider array of titles, cost savings or better use of funds by avoiding the purchase of titles that are never used, and reduction in staff time for selection and acquisitions activities. However, note that staff time needed for other, new activities will likely increase. More details about how to shape your DDA program to meet specific goals are provided in the chapters of this guide on access, budgeting, and administration.

- 
- What will be the place of DDA in your overall collection strategy?
  - How will DDA be used to compliment other collection-building techniques, such as approval plans?

Keeping in mind that not all titles are available as e-books, and not all e-books are made available for DDA by publishers, decide what role DDA will fill in your overall approach to building your collection.

An aggressive approach would be to have as many titles as possible available only through DDA. In other words, your library would cease buying any books just-in-case, and only buy a book when a user actually wanted to use it. This would eliminate the purchase of any book that would never be used. It is a radical rethinking of the traditional approach to building and maintaining a local library "collection." It also may increase the unpredictability of budgeting, although you

could just decide to cut off purchasing when funds were expended, turning to ILL for the remainder of the budget year, assuming you have budgeted enough funds for that service.

Some libraries serving large populations and consortial groups participating in DDA have found that the money they budgeted for DDA ran out before the end of their budget year, but this has not been the case even for all large DDA pilots. Careful setup of a DDA profile will minimize spending on titles “inappropriate” for your library’s collection, and allowing STLs prior to purchase will lower costs by preventing purchase of e-books used only once or a few times.

A less radical approach is to combine DDA of e-books with affordable subscription e-book collections and “core” purchased e-books. This approach can serve to satisfy a user population that is a voracious consumer of e-books within the constraints of the library budget. Librarians familiar with the needs and reading habits of their local user population probably are able to predict some of the titles that will actually be used. Analysis of circulation and interlibrary loan patterns can help with these predictions. Other titles may be considered supplemental, of peripheral interest, or “nice to have” but not “need to have.” These latter titles could be good candidates for DDA, knowing that the library will only end up paying for them if they are used.

- 
- Do you know how and to what extent your current collection is actually being used?
  - How many unique titles are you getting for your users via interlibrary loan?
  - Do your interlibrary loan patterns suggest areas in which you have collection gaps?
  - Should you have considered purchasing the titles borrowed through interlibrary loan, instead of the titles you did purchase, but that were never used?

Assuming that you purchase books on the expectation that they will be used, are you certain such use is actually taking place? Studies have long shown that library selectors are only marginally good at purchasing books that are later used. Multiple studies of academic libraries, including large research libraries and smaller libraries, have found that a high percentage of print books—typically 40–50 percent—do not circulate after as many as ten years in the stacks. Prior to implementing DDA, we examined circulation statistics at our library and found that 66 percent had

not circulated a year after purchase. Since our primary mission is to support the current curriculum and our budget is far from unlimited, this represented a large percentage of our book budget not being used to support current needs and supported our decision to implement DDA. Of course the number of unused books will vary from library to library. Knowing the actual use of your current collection will be valuable in thinking about how DDA fits into your overall collection development strategy, and in assessing the success of your DDA program down the line. It is also useful should you need to make a case to stakeholders for why you are implementing a DDA program.

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