Patron driven acquisition in the aspect of managing library collections

A few years ago, the process of purchasing e-books was a relatively simple task. The offer on the market of electronic sources was very limited, and a university usually purchased currently available resources that matched its profile. Now, the situation has changed, as suppliers offer numerous sources taking into account varied needs of the academic environment.

As a result, it is necessary to make a selection, resigning from certain subscribed sources in favour of new ones. The effect of such activities will be an optimal collection that meets users’ needs to the broadest possible extent. In the current situation, the previous criteria for selecting electronic sources may not work. It is thus necessary to develop new, detailed analyses that take into account characteristic features of e-books and e-journals.

Concepts of e-book purchase models and management of library collections

An important element in the operation of a modern library and creation of an electronic resource is knowledge of the market, i.e. available databases and services, their resources and offered tools. Once information is gathered, it may be used to develop basic conditions that electronic sources have to meet for library users to become interested in them.

The basic criterion is thematic scope. Testing resources that do not match the profile of a university will not bring any benefits, and may even have a very negative impact on users’ opinion about the operation of a library, discouraging them from exploring offered sources.

Another condition that has to be fulfilled today by suppliers is ensuring access to the service in the whole university network. An additional advantage, which soon will probably become an obvious feature of electronic sources, will be authorised access from outside a university network, unlimited by the number of simultaneous users. Readers are eager to use the possibility of individual logging that ensures them freedom and a good user experience.

For libraries, of importance are also issues connected with acquisition of rights to a purchased resource and terms of use after expiration of subscription. Some entities try to make sure that a purchased resource of a given service is permanently available in their collections, rather than only during the period of subscription. This has a significant impact on the future of information resources organised by a library. In the best interests of users, they should be prospective and stable. It is unacceptable to constantly change possessed resources, as users become accustomed to certain sources. However, this is not always possible, for instance in the case of e-books.

The first model that became popular worldwide involved purchasing e-books in ready packages, called collections. Purchase of a whole collection allows a library to add e-books to its offer, but a collection created this way usually contains both sought-after books and those of little use for readers. In view of the above, the approach to purchasing e-books needed to be changed, as it is difficult to estimate how many books purchased in the form of a ready package will be actually used, and what percentage of them will never attract users. Following this line of thought, e-book providers proposed libraries to purchase individual, selected e-books in the form of subscription or ownership.

Due to limited financial resources, libraries were forced to look for alternative methods for selecting e-books to be purchased. This led to the development of a new model called Patron Driven Acquisition.

The fundamental element distinguishing the Patron Driver Acquisition model from other models is the person that chooses books to be bought. From the perspective of the subject responsible for the decision-making in the area of selecting e-books to be purchased, models are divided into the following:

a) models in which librarians are responsible for the decision-making process:
   • model of subscribing single titles or whole collections,
   • model of purchasing and owning single titles or whole collections;

b) models in which readers are responsible for the decision-making process:
   • model of borrowing single titles for a short period of time,
   • Patron Driven Acquisition - (PDA) of single titles.

In recent times, we have seen one more model, which will be gaining increasing recognition among librarians and readers. This model is called EBS in short and assumes that whole collections of e-books are made available for use for a small fee for one year. After a year, a library chooses books that are most often used, pays an appropriate extra amount of money and enters them into a catalogue to make them permanently available to readers, while unused books are withdrawn.
In the case of Patron Driven Acquisition, many questions arise, e.g. what to do to ensure that this type of purchase does not exceed the overall amount of a library’s budget earmarked for purchases in a given period, i.e. the budget that a specific library can afford. However, such issues can be solved by limiting purchases when the expenditures reach the budget limit. This involves narrowing down the profile of books intended to be purchased by introducing certain limitations, e.g. in the maximum price of a book. From the perspective of the supplier of e-books, the PDA model has to be developed in such a way to ensure economic profitability of the cooperation. However, publishers are usually open to new challenges. At the same time, they analyse new proposals in detail, and in many cases are even their initiators.

We should bear in mind that the use of the Patron Driven Acquisition model by libraries is possible only thanks to advanced development of IT technologies. It requires close cooperation between librarians, system librarians and IT specialists.

Patron driven acquisition - development and characteristics

The PDA model was created as a result of searching for new directions in the development of academic libraries and necessity to meet growing expectations of library users. Its idea crystallized in two ways. On the one hand, the first attempts to develop and improve new models of e-book purchases were made in libraries in the United States, on the other hand, PDA also has its roots in European libraries. At first, they took the form of proposals for book purchase placed on libraries' websites or the use of information about sought-after titles based on orders placed via interlibrary loan services.

The foundations for the new form of purchasing books were initially created in the United States. NetLibrary, set up in 1998, was the first commercial aggregate of e-books. NetLibrary, becoming the leading supplier of e-books, originated institutional subscription in Great Britain in 2000. Nowadays, NetLibrary is known under the name of eBook Academic Collection and is owned by the company EBSCO, which bought it. Meanwhile, the organisation EbookCorporation Limited, which was founded and financed by private Australian investors, many of whom were booksellers and publishers made its contribution in Australia. This organisation, set up in 1997, became a pioneer in the development of the e-book technology. In 2000, it established the first online bookshop which retailed e-books. The company EbookCorporation Limited was the founder of Ebook Library, one of the largest, leading aggregates of e-books. In 2013, EBL was taken over by the company ProQuest, which became the owner of this brand. Nowadays, PDA is relatively often used and constantly gains new supporters. Almost 60% of academic libraries use a certain form of PDA, and many of them have been doing so for a number of years. The slowest rate of interest in this form of purchase is observed in Europe, but it is attracting new supporters there as well.

The emergence of e-books made academic libraries worldwide face new challenges. One of them was related with the way libraries would buy e-books that would take into account the spheres of cost-effectiveness and rationality of expenditures, as well as usability of library resources. According to the definition, PDA is a model of purchasing e-books in which decisions connected with choosing books to be bought are based on readers’ proposals. The management of a library, cooperating with suppliers of e-books, approves the profile, which depends on the type or classification of books, their scientific character, publication date, cost or other factors indicated in criteria.

Source: Own work.
Advantages and disadvantages of implementing the patron driven acquisition model

The use of PDA results in a significant increase in the range of available books, which can be used by a potential user of a library, by offering a large number of MARC records in a catalogue. By increasing the number of e-book records and making readers responsible for choosing e-books to be purchased, the risk of buying unnecessary books is completely eliminated. Every book bought using the method of Patron Driven Acquisition has to be used at least once.

Collections created by readers will undoubtedly have certain characteristics. They include great usefulness from the reader’s perspective, utility, purposefulness and limited predictability of the final character of so created collection. Even when strict criteria for the profiles of books to be purchased are used, it is difficult to predict whether the content of a collection created by readers will be temporary or timeless.

Both in the case of paper books and e-books, librarians are not able to fully predict which of them will be intensively used by readers, and which ones will fill the shelves or remain useless in computer catalogues for many years. In the case of using the PDA model, there is no risk of unjustified spending of money on e-books that will never be used11.

Moreover, in the case of e-books, it is also important to prevent the situation when records of useless e-books remain in computer catalogues of libraries. In the Patron Driven Acquisition model, the problem of unnecessary book records appearing in the computer catalogue does not exist. After a pre-defined period of time, records of unused e-books are automatically removed. Only records of books that are read, which are then bought, remain.

The use of Patron Driver Acquisition by a library leads to a more effective management of financial resources. The problem of incurring expenses as a result of purchasing useless books does not appear. The money to be spent by a library is earmarked only for useful books from the reader’s point of view. Thus, from this perspective, PDA seems to be the most economic and effective system for purchasing e-books.

As with every novelty, also the PDA model has certain disadvantages. One of them is potential and irreversible possibility of creating a poor collection in terms of academic value if a wrong profile of e-books intended for purchase is created. However, even the best profile does not exclude a situation when a valuable book is unnoticed by readers, and consequently not bought by a library12.

A valuable book may also be overlooked when the budget earmarked for purchasing e-books is used more quickly than expected. After books are purchased for a specified amount of money, possibility of further purchases is automatically blocked. As a result, such situation may hypothetically lead to an oversight in purchasing valuable e-books13.

In view of the above, libraries should consider using various purchase tools at the same time, i.e. they shouldn’t rely only
on the PDA model, but create collections of books using traditional methods as well.

Libraries that decided to implement the PDA model can conduct analysis of the application of PDA already after the first year. Such analysis provides a clear insight into the effects of using this model and specifies such issues as which category of users made the biggest number of purchases and which books were most sought-after by readers. Only the analysis of the practical use of the PDA model makes it possible to verify and define better directions for the future.

**Summary**

The PDA model assumes a fundamental change of the strategy of gathering e-books, from buying them just-in-case, because of their potential significance for the development of a specific field, to the just-in-time strategy, i.e. purchases initiated by readers, matching their specific, current needs.

Moreover, the PDA model reduces the risk of buying “dead” titles, i.e. those that will never be read, and makes it possible to test current demand for specific titles. It should be stressed that users are often more interested in books selected as part of the PDA model than those chosen by professionals, and the overwhelming majority of books purchased based on this model are used after their purchase.

Doubts about the value of the PDA model are connected with questions of whether long-term educational objectives are not in contradiction with current needs of readers and how we can avoid a situation when short-term interests of a small group are pursued at the cost of a long-term objective to widen scientific horizons of all students. There is certain risk of overlooking books that are significant for the development of a given field and creating a wrong profile of collections. Costs are also a problem – by making readers responsible for taking decisions about how to spend part of the budget, money may not be left for other, equally important purposes. Agreeing on an optimal and precise license agreement with a supplier and defining the criteria for initial selection of books requires that librarians change their attitude to tasks connected with creating collections and show full commitment. They have to focus their attention on exploring the market of e-books and paper books, and constantly analyse statistics on direct borrowings and inter-library loans. It is also necessary to control purchased books to ensure that they meet the needs and policy of a university and a library.

**Abstract**

Among several models of the supply of e-books that are currently functioning worldwide, the model called Patron Driven Acquisition is gaining prominence. The paper presents the characteristics of this model, with special reference to the problem of selection and use of purchased collections as well as effects of the application of this model from the perspective of a library, reader and publisher. The paper characterises the model of user-initiated supply of e-books, which is more and more often practised in libraries, and discusses issues connected with its implementation in the aspect of advantages and disadvantages, impact on library management and new tasks of librarians.

**Keywords**: Patron driven acquisition, managing, library, e-books, e-journals.

**Zakup sterowany popytem w aspekcie zarządzania zbiorami biblioteczna**

Spośród kilku obecnie funkcjonujących na świecie modeli dostawy książek elektronicznych wiodące znaczenie zyskuje model zwany Patron Driven Acquisition, czyli zakup sterowany popytem. W artykule zaprezentowano istotę tego modelu, ze szczególnym uwzględnieniem problemu selekcji i wykorzystania zakupionych zbiorów oraz skutków jego stosowania z punktu widzenia bibliotek, czytelników i wydawcy. Scharakteryzowano coraz częściej praktykowany w bibliotekach model dostawy książek elektronicznych inicjowany przez czytelników, omawiając kwestie związane z jego implementacją w aspekcie wad i zalet, wpływu na zarządzanie biblioteką oraz nowe zadania bibliotekarzy.

**Słowa kluczowe**: zakup sterowany popytem, zarządzanie, biblioteka, książki elektroniczne, czasopisma elektroniczne.

**Bibliography**