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# Let Them Eat PDA: Inspiring Innovation with Emerging Selection Models

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# Let them eat PDA

Inspiring Innovation with Emerging  
Selection Models

*Panel presenters:*

*Valerie Boulos, Andrew Copnick, Erin Gallagher,  
Rachel Perry*

# Agenda/Topics to Be Covered

- Why PDA?
- Planning Process
- Implementation
- Ongoing Maintenance
- Looking Ahead
- Pop Quiz



# Why PDA



# Why PDA

- SPACE...SPACE...SPACE
- Lack of a subject selector precipitated the need to continue collection development and selection of materials (FIRM ORDER, APPROVAL PLAN)
- A need to expand e-book availability based on delivery of curriculum
- Providing resources to library patrons in terms of what they want AND what they need
- Proven and cost-effective method of collection development

# Planning Process



# Planning Process

- Goal to add quality content to collection while maximizing budget to pay for items with substantial use
- Vendor selection can be simple as using existing primary book/e-book vendor
- Multiple vendors require a need to de-duplicate purchased items in a previously used profile
- Be knowledgeable of the potential audience that will trigger subject content
- Get stakeholders on board with initiative, notably Subject Bibliographers, fully invested in the PDA process
- Investigate whether there are exclusivities from publishers that restrict content from being loaded onto an e-book PDA

# Planning Process

- Determine record loading policy --- are order records attached (non-encumbering/suppressed)?
- Review profile and Non-Subject Parameters (NSP's) carefully since people are not perfect and vendors may inaccurately communicate what needs to be populated in formal profile that drives PDA (e.g., price range/cap, formats, subject areas, textbooks)
- Assess the loading of records
  - Are the records "brief" discovery records OR are they full records that adhere to both formal cataloging and in-house standards?
- What is the frequency of invoicing
- Need to analyze the reporting mechanisms that are in place by the vendor (e.g., trigger reports, usage reports)
- Determine whether institution permits a deposit account structure for Usage Demand Acquisitions (UDA) model



# Implementation



# Implementation

- Existing Approval Plan (AP) plans may be re-purposed with specific subject classification areas targeting PDA
- Create workflow for the receipt of discovery records, monitoring of usage data/trigger reports, invoicing, and payment
- Budgetary allocation is collective pool of funds or individual allocations per subject areas
- Single-user license model preferred over Short-Term Loans (STL)
- Bibliographic/Order records includes standard phrases and coding to identify items acquired with PDA for ease of statistical gathering

# Implementation

- Bibliographic record load table set to reject duplicate ISBN's for prevention of items selected and/or paid via firm ordering or Approval Plan
- Single point-of-access e-book platform selected to prevent duplication on a different aggregator

# Ongoing Maintenance



# Ongoing Maintenance

- Closely monitor usage data/trigger reporting mechanisms to prevent an over-budget situation
- If lack of trigger events review PDA profile for any limitations
- Act quickly to remove traces of records that might lead users to pulled publisher's content and "dead ends"
- Bibliographic maintenance to clean records as per cataloging policies
- Annual review of PDA holdings --- maintain accumulated collection or weed non-triggered titles

# Looking Ahead



# Looking Ahead

- To market or not to market? That is the question...
- Present the successes of PDA to faculty and reinforce as a “cost-intelligent” collection development model that engages and involves users in the decision-making process
- Monitor vendor policies (re: triggering events) and publisher participation and assess if PDA content is worthwhile and relevant to course curriculum
- Lobby non-participating vendors to adopt a PDA model (or some semblance of it)
- Budget consideration, especially with UDA programs

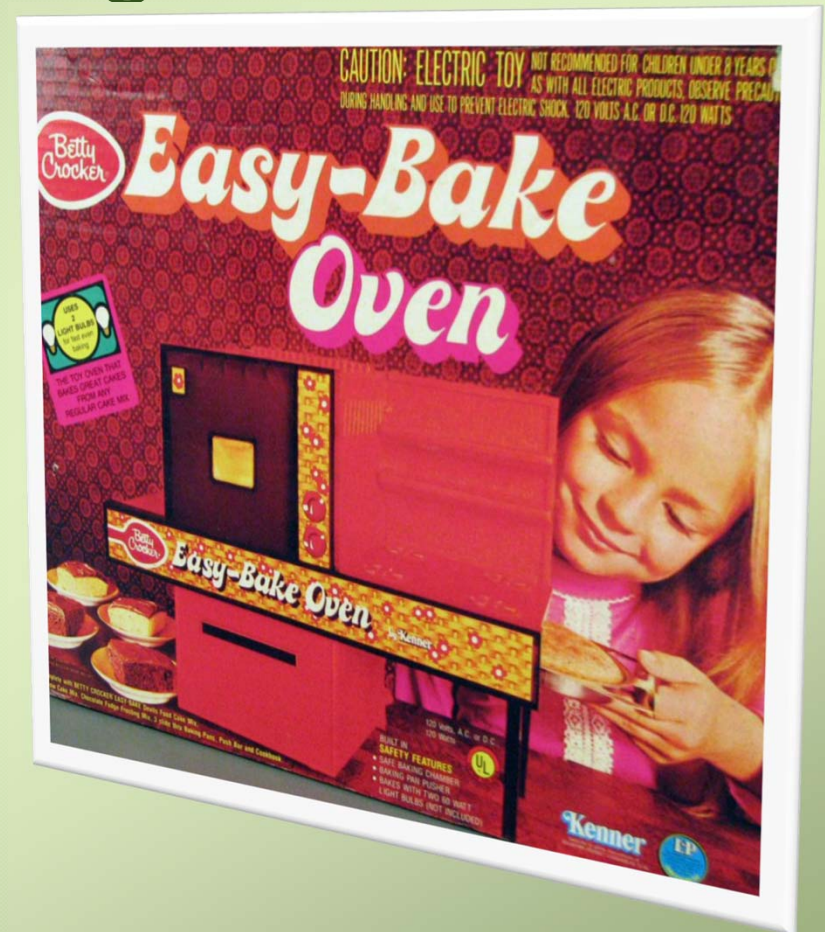
## Q&A

When a cow  
laughs, does  
milk come out  
of its nose?



# Thank you for attending!

- Valerie Boulos [vboulos@fiu.edu](mailto:vboulos@fiu.edu)
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- Erin Gallagher [egallagher@rollins.edu](mailto:egallagher@rollins.edu)
- Rachel Perry [rperry@nova.edu](mailto:rperry@nova.edu)



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