

NOVANET DDA REPORT
Final Report
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Executive Summary

In the spring of 2011, following Board approval, Novanet embarked on a consortial eBook DDA pilot project. Working with EBL we developed a model that emphasized access over ownership by setting a high number of short term loans (STL) before a purchase is triggered and one that also considered Novanet be a single institution so that the then typical practice of publishers charging a multiplier to the list price of two or three times list for any consortial DDA packages would not apply. This model and the pilot itself was intended to address the main reasons we began this project:

- Demonstrate whether there is a want or need for a consortial DDA eBook package
- Provide universal access to all Novanet users to the eBook package
- Keep costs low

The pilot ran from September 2012 until December 2013. By the end of the pilot our DDA eBook package had approximately 20,000 titles. Forty-seven books were purchased, an additional 2814 unique titles were borrowed and a total of 4152 fee-based transactions occurred during the pilot. There were a total of 19,724 views/uses and just over 3700 people used the collection. Of the \$100,000 set aside for the pilot \$60,000 was spent.

Following analysis of gathered data and two surveys of staff the Novanet eBook DDA Steering Committee makes the following main recommendations. These and other recommendations are discussed in more detail in the report.

1. That a permanent, ongoing Novanet DDA eBook program be instituted
2. That the program be funded by members contributing \$200,000 (either based on a percentage of their annual Monograph acquisition budget or based on the Novanet formula) to a central Novanet account
3. That the program be managed by the Novanet office in consultation with the Novanet Collections Coordination Group. This group will also be tasked with advising on policy for a larger, more comprehensive collections rationalization

Introduction

Demand Driven Acquisition (DDA) or Patron Driven Acquisition (PDA) is a collections model for libraries based on the concept of purchasing or gaining temporary access to any monographic works users want. The concept dates back at least to 1981 where early versions were based on obtaining print copies of any book requested by a user through Interlibrary Loan or a purchase request form (Rawlinson). With e-books the model shifts to one where MARC records for large collections of e-books are loaded to the catalogue and purchases for short-term loan (STL) or full ownership are made only for those that are accessed by users. Several studies have shown this model to result in high user satisfaction, and high use of collections (Putnam, Wiley). However it is important to note that the gap in collection building philosophy versus the serving of immediate needs of users is important and meaningful, and that DDA by no means makes

the work of librarians in collections building obsolete (Hodges).

DDA offers a strong shift from the traditional “just-in-case” model of collections management. In the traditional model monographs are purchased, received, processed and held on library shelves in the hopes that they will be useful for our users. The “just-in-time” nature of ebook packages, particularly those with short term loan options, prompted a quantitative, statistical usage analysis of the traditional “just-in-case” model of a few print collections within the Novanet Consortium. This research shows that only 50% of print monographs with imprint dates of 2009 have circulated by 2012 and further analysis shows that on average, after 12 years, only 35% of print collections had circulated more than 5 times (Duggan and Swords, 2013). This pattern is not unusual as several studies from other institutions clearly shows (Booth, Davis). Looking at the entire collection rather than just books with recent imprints, a study at Ohio State University from 2010 showed that in a 6 year period only 31% of the general collection had circulated (Hodges). The DDA model addresses this by allowing the library to only pay when an e-book is used, potentially offering great savings to the collections budget while also offering users a wider range of monographs to choose from than could be purchased in the traditional model.

The e-book format itself poses several problems to a consortium with a shared ILS. Limiting access via IP authentication, however normal for journals and electronic databases, undermines resource sharing within the consortium - specifically the *Novanet Express* reciprocal borrowing model that is a tenet of the Novanet consortium upon which users have come to rely for sharing print collections. Also, e-books are often purchased or loaded to the ILS in large batches. The amount of systems time and effort to load records for each institution is an issue and any shared access records would avoid unneeded duplication, both in systems time and in institutional ebook packages.

The Novanet Consortium began a pilot project in the fall of 2012 that attempted to combine shared e-book licenses for all consortium members with a DDA collection model. The following report outlines the objectives of the pilot project and the methods used. Both qualitative and quantitative analysis are offered and discussed, followed by several recommendations for future expenditures on e-books by the consortium members.

Rationale for the Project

In October of 2011, a Novanet Project Group presented a report (available on the Novanet site) which examined DDA vendor options, existing Novanet library practices, and other consortial models. This report recommended that “significant service enhancements and technical efficiencies could be achieved by a consortia-wide PDA/DDA program” to address the issues they identified.

The pilot which was implemented as a result of this report attempted to address the following concerns.

Universal access

The main problem this pilot project tried to address was the issue of resource sharing. We wanted to offer e-books that could be available to all Novanet users regardless of their institutional affiliation. Since the first e-books were introduced to the Novanet catalogue the users of each institution were limited to accessing only those e-books licensed specifically for them. These collections often offered unique content, and many complaints were heard from users who had been frustrated by discovering items in the catalogue that they could not access.

Reduce system and staff time stress

A long term objective for shared e-books is to reduce system strain for loading and indexing of duplicate records by each institution. Given the small collection in the pilot there was little effect in this area, however, a larger collection and shift from individual collections to shared collections would most certainly solve this issue (Wen-yin Lu).

Pay per use

Another objective of this pilot was to collect data that could be analyzed to determine the value of DDA in terms of a pay-per-use model. Specifically, would the cost per use of STLs show a significant improvement over our traditional acquisitions practices?

Access not ownership

The cost of processing physical books, along with the space considerations involved with long term storage has long been an issue in libraries. Ebooks solve some of these issues; however perpetual "ownership" of e-books also creates its own set of issues. These include maintenance in the catalogue, changing access rights between the providers and publishers, controlled usage by the vendor. Licensing of, or issues arising from, the creation of locally housed PDF versions was not explored in this pilot project. The current DDA model used for this pilot only triggered a perpetual access license for those books used at least 6 times. Those used less have their records removed at the end of the pilot. The effect of this on user satisfaction is uncertain.

Collection rationalization

Novanet has not had an official coordinated effort to rationalize collections in the past. The possible benefits of cooperative collection development within consortia include reduced duplication of collections, increased savings in acquisitions, increased user satisfaction brought on by larger available collections, increased use, and decreased cost per use (Booth, Mallery).

Based on these reasons we developed a model for the Novanet DDA pilot.

- Collection available to all Novanet members
- No list price multiplier (Novanet as a single "institution", with multiple "branches")
- Five one week STLs (10 - 20% list price per STL)
- Sixth STL triggers a purchase at list price; 14 loans in a 12 month period triggers a second purchase at list price

Description of the Collection

In consultation with Yankee Book Pedlar (YBP) and Ebook Library (EBL), we identified a

collection of e-books for all students, staff, and faculty of the Novanet institutions with a single cataloguing record. Convincing publishers to include their books in this pilot was a challenge not unlike other DDA programs have seen (Forzetting, Esposito). From those publishers that did participate, imprints from only the current five years were included, as users have been shown to gravitate towards newer materials especially when using e-books (Medeiros). Non-academic titles were excluded, but no subject exclusions were done as studies have shown that subject area cannot be correlated to use in any meaningful way (Hodges, Medeiros), however analysis of use by subject will be performed in this pilot study in order to confirm those results. The result of the profile of available books was a collection numbering 20,870.

Results/Data

Data was analyzed in a number of categories including usage by subject classification, by institution, patron type and by cost/expenditures.

Figure 1 shows a breakdown of purchases and loans by broad Library of Congress subject headings and Figure 2 compares the purchases and loans to the number of titles in the collection broken down once again by LC classification. This data indicates the collection was multidisciplinary and had a broad appeal across disciplines. It also indicates that collection size may have some correlation on usage. Figure 2 indicates that the greater the number of titles in a specific subject area, the greater the usage. However as a percentage, usage remains fairly consistent in each subject areas. This tends to mirror usage in our print collections (Figure 3). Regardless of the number of titles each library buys – more for Dalhousie, less for Acadia, the percentage usage remains somewhat constant with 60-70% of the collections having not been used. The advantage to this ebook model is no money is spent on the unused items and for items used less than 5 times, fewer dollars are spent on those items than if the item was purchased outright. In addition, a clear plus of an econtent package like this one is that patrons can browse and review table of contents, indexes, and introductions for up to five minutes without any fee. Statistics collected show that there were 19,732 transactions in total within the collection during the pilot, however only 4152 fee-based transactions resulted. A total of 457 individual books were browsed for free with a total of 175,118 pages viewed. All without any fees. Only a PDA invoicing model permits this kind of evaluation by our users for free.

More study and continued collection of data and statistics is required as the project goes from pilot to ongoing is needed to determine whether changes to quality or quantity of the collection will affect the usage.

Autopurchases and Short term Loans by LC Class

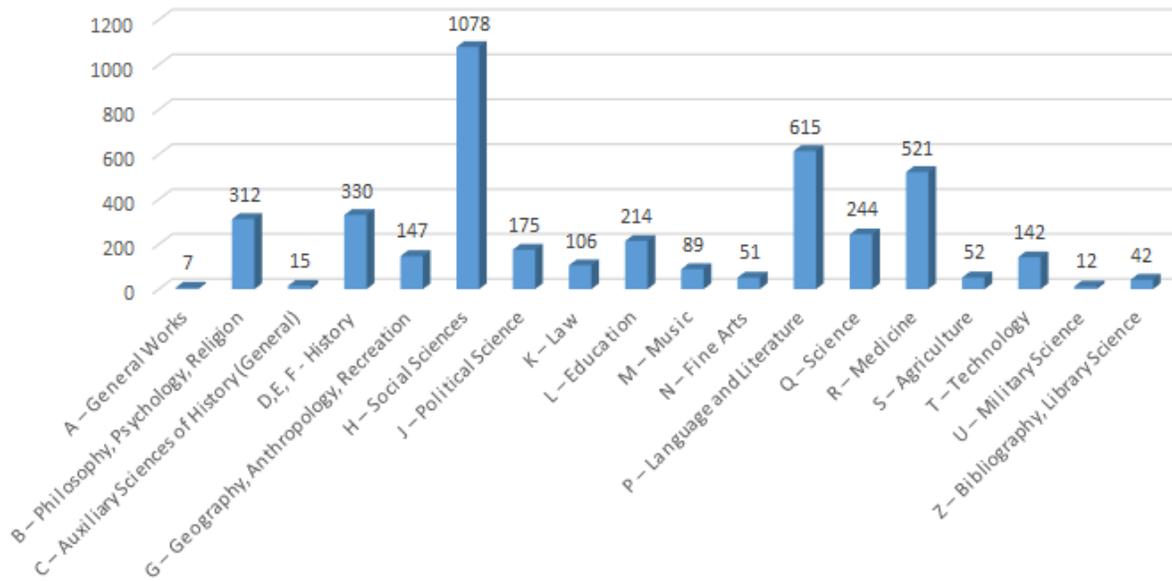


Figure 1: Purchases and Loans by LC classification

LC class of entire collection vs. LC class of autopurchases and short term loans

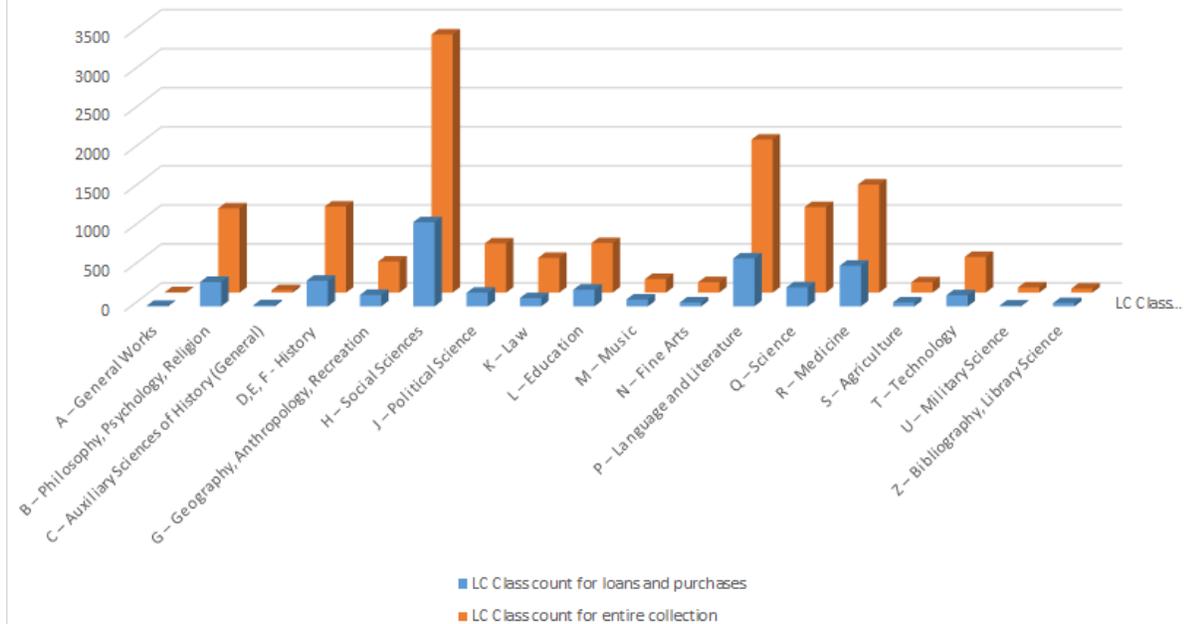


Figure 2: Purchases and Loans compared to Entire Collection

Books of Imprint Years 2008, 2009, 2010

Circulations	0	1	>1	Total
DLKIL	12,354 63%	4,232 22%	3,064 16%	19,650
DLLAW	864 53%	382 24%	370 23%	1,616
DLSXT	2,029 64%	600 19%	563 18%	3,192
DLWKK	1,205 58%	418 20%	437 21%	2,060
Total	16,452 62%	5,632 21%	4,434 17%	26,518

ACADIA

Imprint Year	Total	Never Circulated	1-5 times	>5 times
2010	2014	1168 (58%)	745 (37%)	99 (5%)
2011	1876	1198 (64%)	620 (33%)	56 (3%)
2012	789	567 (72%)	214 (27%)	8 (1%)

Figure 3: Examples of Circulation Data from Dalhousie and Acadia Print Collections

When the data was broken down by purchases and loans at individual institutions within the consortium, it resulted in numbers that mirror enrollment at these institutions with the exception of Acadia and NSCC. A further explanation of why these anomalies may have occurred is included in the discussion section.

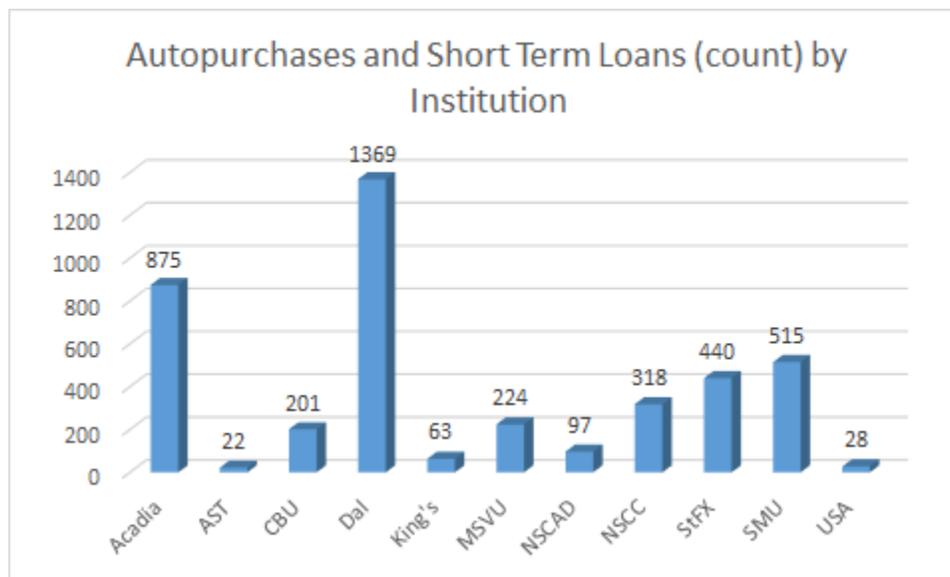


Figure 4: Number of purchases/loans by institution

Figure 5 shows the usage by patron type at each institution and not surprisingly undergraduates, who make up the largest groups at the Novanet universities were the largest users of the ebooks, but once again the appeal was broad and all groups, faculty, staff, graduate and undergraduate students used the collection during the pilot period. Dalhousie had significant use by graduate students corresponding with the fact that Dalhousie has the largest number of graduate students in the consortium.

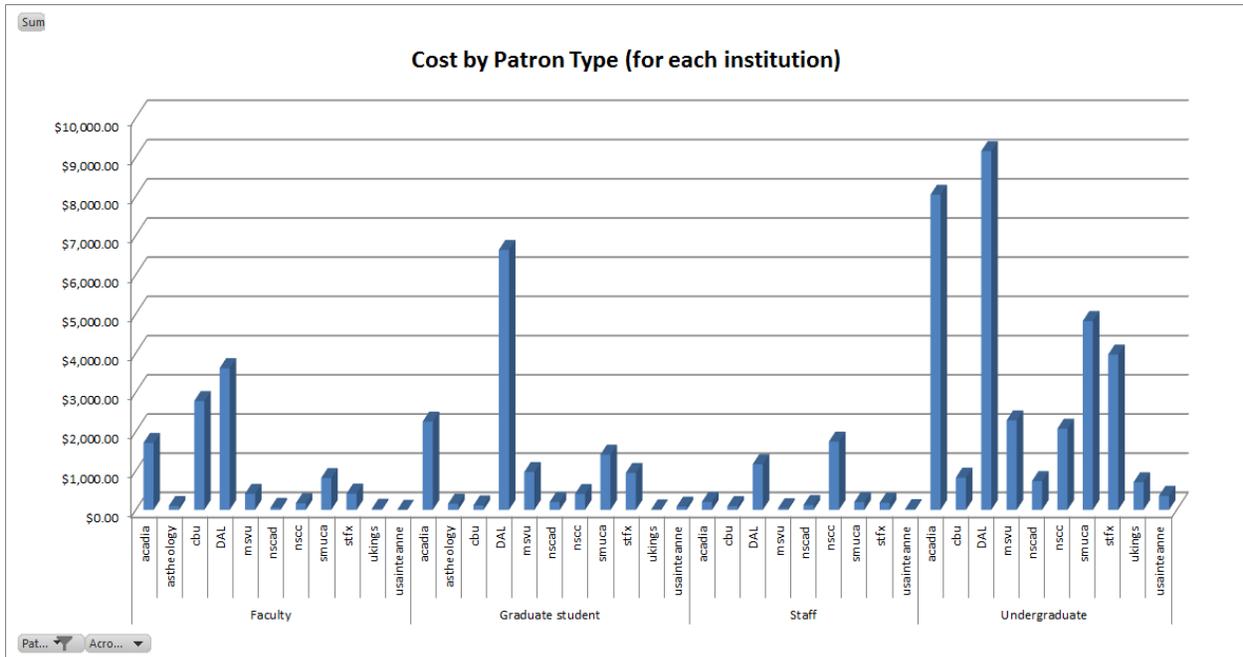


Figure 5: Cost by Patron Type by Institution

Next an analysis was created to compare actual usage costs by institution to the allocation of funds at the outset. To insure that this was a consortium endeavour, individual institution funded the pilot based on the Novanet formula – which includes on number of factors such as FTEs, collection budgets, etc. It is the same formula used to determine membership fees in the consortium. Figure 6 shows the actual dollar figures of sales generated by each institution. Figure 7 shows in table format, the amount funded by institution, the amount of sales by institution and the percentage differences.

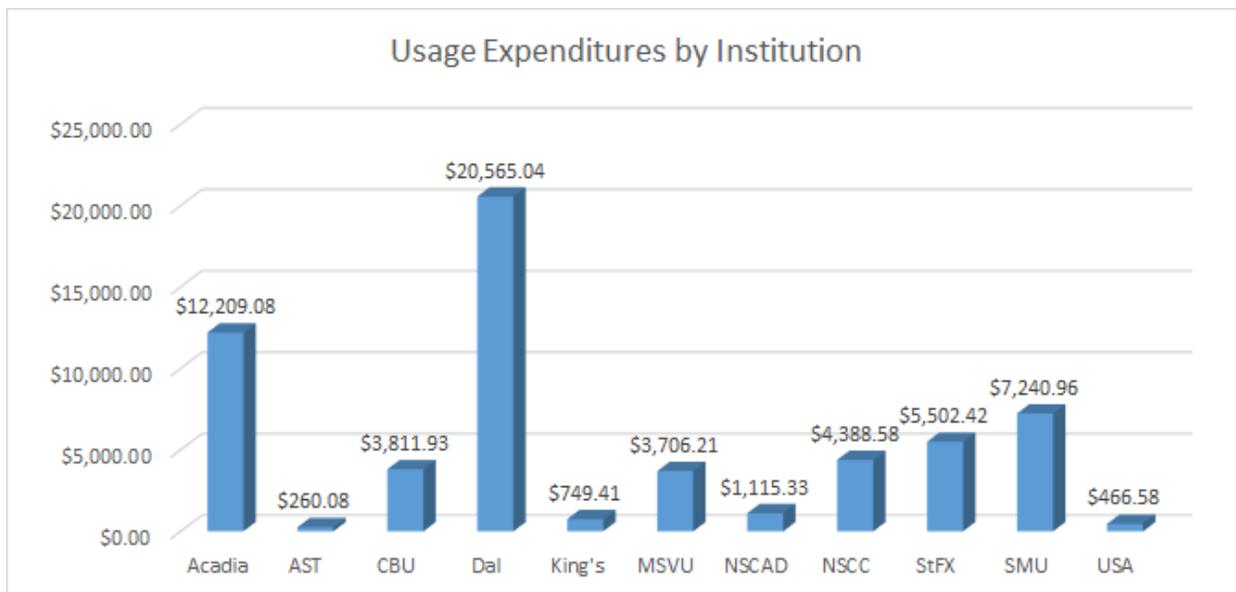


Figure 6: Usage expenditures by Institution

Ebook Purchase Distribution	\$ paid	% of total	\$ of ebook use	% of total	# of ebook use	% of total
Atlantic School of Theology	\$ 940	0.9%	\$ 260.08	0.4%	22	0.5%
Acadia University	\$ 8,340	8.3%	\$12,209.08	20.3%	875	21.1%
Cape Breton University	\$ 5,570	5.6%	\$ 3,811.93	6.4%	201	4.8%
Dalhousie University	\$ 38,130	38.1%	\$20,565.04	34.3%	1369	33.0%
Mount Saint Vincent University	\$ 7,350	7.4%	\$ 3,706.21	6.2%	224	5.4%
Nova Scotia Agricultural College*	\$ 2,250	2.3%	\$ -	0.0%	0	0.0%
Nova Scotia Community College	\$ 12,560	12.6%	\$ 4,388.58	7.3%	318	7.7%
NSCAD University	\$ 2,200	2.2%	\$ 1,115.33	1.9%	97	2.3%
Saint Mary's University	\$ 12,110	12.1%	\$ 7,240.96	12.1%	515	12.4%
St. Francis Xavier University	\$ 8,110	8.1%	\$ 5,502.42	9.2%	440	10.6%
University of King's College	\$ 2,440	2.4%	\$ 749.41	1.2%	63	1.5%
Université Sainte-Anne**	\$ -	0.0%	\$ 466.58	0.8%	28	0.7%
	\$ 100,000	100.0%	\$60,015.62	100.0%	4152	100.0%

*Nova Scotia Agricultural College became part of Dalhousie University after the launch of the pilot, so separate statistics were not maintained for both institutions.

**Saine-Anne joined Novanet after the launch of the pilot, which gave them access to the pilot collection.

E-Book Purchase Distribution

	\$ paid	% of total	\$ of ebook use	% of total	# of ebook use	% of total
Atlantic School of Theology	940	1%	\$260.08	0.4%	22	0.5%
Acadia University	8,340	8%	\$12,209.08	20.3%	875	21.1%
Cape Breton University	5,570	6%	\$3,811.93	6.4%	201	4.8%
Dalhousie University	38,130	38%	\$20,565.04	34.3%	1369	33.0%
Mount Saint Vincent University	7,350	7%	\$3,706.21	6.2%	224	5.4%
Nova Scotia Agricultural College	2,250	2%		0.0%		0.0%
Nova Scotia Community College	12,560	13%	\$4,388.58	7.3%	318	7.7%
NSCAD University	2,200	2%	\$1,115.33	1.9%	97	2.3%
Saint Mary's University	12,110	12%	\$7,240.96	12.1%	515	12.4%
St. Francis Xavier University	8,110	8%	\$5,502.42	9.2%	440	10.6%
University of King's College	2,440	2%	\$749.41	1.2%	63	1.5%
ste anne			\$466.58	0.8%	28	0.7%
Total	<u>\$ 100,000</u>	100%	\$60,015.62	100.0%	4152	100.0%

Figure 7: comparison including percentages of funded amounts and usage costs

As noted above, the key advantage to this type of collection is that only items that are used have a cost, but some additional data was collected on ebook prices. According to YBP Annual Book Price Update (http://www.ybp.com/book_price_update.html) the average price of a front list title from an ebook aggregator is \$111.30. The cost per short term loan (STL) for the pilot was \$13.59. Analysis of both ebooks and print books indicate that only about 30-40% of purchased items are used by patrons more than once and 5% more than six times. Clearly the two figures are not comparable because a heavy premium is paid for the additional privileges that go along with purchasing over borrowing (such as archiving rights and unlimited use). That said, \$13.59/loan was sufficient to meet the actual user needs. When exceptional use triggered a purchase, the cost on average raised the price to \$152/title for the small subset of 48 titles that were purchased (this figure includes the cumulative costs of 5 loans and the purchase). However the \$152 cost for a title owned by the consortium is still less than if 2 or more libraries had purchased the title.

Staff Feedback

To ensure that staff from all of the Novanet Libraries had the opportunity to participate and provide feedback, two surveys were conducted during the pilot. The first was sent out via the Novanet list in February 2013, just after the launch of the pilot; the second, sent out in December 2013, mirrored questions of the earlier survey to track whether perceptions had changed or if new problems or issues had arisen.

Responses to the December 2013 survey indicated strong staff support for a consortial ebook program and provided concrete recommendations if another program is considered. Over 92% of the 38 respondents to this survey indicated that they "think it is an improvement for students, faculty and staff to have access to a pool of ebook titles in a shared, commonly accessible catalogue". Responses mirrored those in the February 2013 survey in which 96% of the 49 respondents indicated support for a consortial ebook program.

In the December survey, when asked, “Should Novanet continue to actively pursue shared ebooks?” over 76% of respondents indicated “Yes”. Of those who responded “Not sure” or “No”, all cited navigation or collection parameter concerns, which could be corrected, or their concern with the spending of limited funds on ebooks which could be addressed through training.

Comments provided throughout the initial survey indicated support for a shared consortial collection which is “in the true spirit of resource sharing across Novanet” and which “increases access, decreases barriers” (from February 2013 survey).

Comments in the December survey reiterated this support; 40% of the over 100 free-text comments related to support for a shared consortial collection which “opens up resources”, provides “access to the largest possible pool of resources” and decreases “individual collections...that are otherwise inaccessible” at other institutions in the consortium. A number of responses indicated frustration with the significant number of titles which can only be accessed by the owning institution(s).

Many comments in the December survey provided recommendations on to how a consortial ebook program could be improved:

- 20% of comments related to improving the collection scope, which was not surprising given the limited number of titles that were able to be negotiated for inclusion in the pilot. Comments also recommended defining parameters for textbooks and non-academic materials and negotiating licenses which would permit titles to be linked in reserve/course management systems.
- 15% of comments provided suggestions for navigation improvements, many of which related to improving the searchability and display of ebooks in the discovery layer. This recommendation could be considered as part of the search for a new discovery layer.
- 15% of comments indicated or suggested the need for more promotion, training and instructional materials; staff training could also address concerns reflected about collection funding and the value of ebook collections.

Discussion

Universal Access

One of the key reasons for embarking on a pilot was to improve customer service and reduce end-user frustration by providing a collection which could be accessed by all Novanet users. Our current practice of individually loading ebook packages into the ILS by institution is a step back from the goal of a shared catalogue which was created to make titles accessible to patrons in non-owning libraries.

Reduced costs

One other shared value of the consortium is reducing staff effort by sharing the workload of maintaining the catalogue, which was a second reason for the pilot; our current method of

handling ebooks steps back from workload sharing, since each institution is responsible for its own records, even if they are duplicates of titles provided by another in the consortium. This also leaves the Novanet office with additional work involved with record loading and deleting.

Acceptance by staff; by users

Survey results indicate that staff would like Novanet to continue to create seamless access to ebooks and mitigate additional staff workloads through a consortial program. Because the pilot was meant to be seamless to the public by providing access to titles through the catalogue, their input was not formally gathered. However, many staff survey comments point to the frustration of students and staff in not being able to access titles in the catalogue, which indicates their receptiveness to a collection which would be accessible by all.

Issues identified

Lack of acceptance of model by publishers

The biggest obstacle identified by staff was the depth of the negotiated collection. The project group had originally intended to offer a broad collection of close to 50,000 titles, but the vendor negotiations with publishers resulted in a much smaller title list than anticipated.

Quality of collection

While the collection contained a number of front-list titles from reputable academic publishers, some important publishers including Ashgate, Brill and Edward Elgar declined to participate. A comparison was completed between the holdings in the pilot and a large subscription based ebook package showing approximately a 30% duplication of titles. This may indicate that many of the titles available in the pilot are titles commonly made available to aggregators, calling for further investigation, and perhaps more mediation from collection librarians, into the selection of titles.

Inclusion of Reserves, CMS options and ILL

Another obstacle identified through the staff surveys was that titles were not licensed for linking in course reserves or content management systems. In a consortial system as large as ours, it was difficult to ensure this communication was received by all library staff and users, and there were a couple of instances in which these links were inadvertently added.

Ebooks represent the first time in the history of libraries where a significant amount of a library's collection is not available to be shared with other libraries through interlibrary loan. Libraries have successfully negotiated with publishers to allow interlibrary lending of electronic articles, but ebook interlending licensing requires work.

Take aways

There is no question that many library consortia and individual libraries are struggling with the

best way to incorporate ebooks or ebook collections into their holdings while trying to be efficient and provide a selection that is accurate, current and relevant to users. There does not appear to be a “right” answer. The Novanet model is only one model of the many being tested around the world. Many organizations work within one or more consortia, so it is important to keep consortial access high on the list of priorities particularly for those with shared ILSs and until issues such as interlibrary loan services and walk-in access are addressed. It is imperative that libraries, publishers, and aggregators work together to develop arrangements that are acceptable to all parties. The constant stress of status quo and diminishing library budgets makes this difficult. Access and management of ebooks may be collection issue that forces more rationalization in our collections. Finally, it is not likely that one or more consortially negotiated ebook packages will solve all of our collection woes. Libraries of universities and colleges support a wide variation of programs and areas of research and libraries within consortia will always want to maintain a certain measure of control over their collections.

Anomalies

Acadia: There may be a number of factors that contributed to Acadia’s above average use during the pilot. In 2012/13, Acadia was not yet a full member of Novanet. Records were accessible through the SIRSI catalogue and Acadia’s WorldCat Local installation approximately 6 weeks earlier than the other Novanet libraries. Though a conscious effort was made not to promote or market the pilot to patrons, librarians did note at faculty councils meetings that Acadia was participating in this project and in addition to the catalogue records, a direct link was provided on the library’s eresources page and on a number of libguides. Finally, other than CRKN ebook collections, this collection was Acadia’s first major ebook collection.

Nova Scotia Community College: This institution’s lower usage may be attributed to a number of factors, including the fact that it had previously set up another ebook pilot collection which was not discoverable in the ILS; patrons of the 13 campuses which make up NSCC discovered these ebooks in the same way as they had been trained to discover e-journal articles, which were also not discoverable in the ILS during the pilot.

Mount Saint Vincent University maintains a separate DDA plan with EBL representing a more comprehensive range of publishers. From October 27, 2012 to May 31, 2013 the Mount was invoiced for 398 short term loans for e-books duplicated in the Novanet DDA collection. Duplicate links were successfully removed from the Novanet catalogue, but continued to display in World Cat Local providing Mount students the opportunity to select their home university in preference to Novanet.

Recommendations

1. That a permanent, ongoing Novanet DDA eBook program be instituted.

2. That the program be properly funded by Novanet members. Based upon information gathered from the pilot and experience from previous negotiations, the committee recommends that in order to increase the number of titles, particularly front list titles, the amount should be at \$200,000 per year. Suggested options for a funding formula: a percentage of monograph acquisition budgets, continued use of the Novanet formula or a new proposal from the directors.
3. That the recently constituted Novanet Collections Coordination Group work with the Novanet Manager and office staff to advise the board on Econtent collections.
4. That the mandate of the Novanet Collections Coordination Group include:
 - i. development of policies for collections rationalization
 - ii. development of parameters for the DDA/PDA program
 - iii. creation of the criteria for the profile to define the discovery record collection
 - iv. submit annual report to the Manager and the Board
 - v. promote and facilitate the use of the shared collection among member communities
 - vi. ensure that any important changes to the collection content and/or access are communicated to member institutions in a timely fashion
5. That the Novanet office negotiate with DDA eBook aggregators based on the success of the pilot model including the following:
 - i. Continue the practice of a high number of STLs (5) before a purchase is triggered.
 - ii. Continue central billing directly to the Novanet office
 - iii. Carefully consider options from publishers/vendors, including the allowing individual libraries to trigger purchases, in order to expand the titles in collection.
 - iv. Resist a price multiplier
 - v. Investigate the outright purchase of Reserve materials
 - vi. Investigate submitting the IP range for all institutions within the consortium in order to allow walk-ins and to be more in line with other econtent and national model licensing standards.
 - vii. Facilitate ease of downloading to mobile devices
6. That titles in individual DDA collections be removed from the OPAC if they are duplicates of consortial DDA titles and careful consideration be given to what individual collections are loaded into the OPAC to reduce the frustration of patrons inability to access materials they find in the consortium's catalogue.

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