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Kimberly Kennedy and Jamie Saragossi

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## **Evaluation of a PDA Pilot Program to Address Equity and Diversity in Academic Library Acquisitions**

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### **ABSTRACT**

In the summer of 2023, Stony Brook University Libraries (SBUL) embarked on a transformation, shifting from a traditional liaison-based system to a teams-based approach. This transition reflects a broader trend in academic libraries toward optimizing operational efficiency and resource allocation amidst evolving staffing and budgetary challenges. Central to this transformation is the redefined role of the Division of Collection Strategy and Management, which now oversees all areas of collection development. This paper examines SBUL's decision to pilot a user-centered collection development strategy, implementing a multiple-publisher Patron-Driven Acquisition (PDA) model while maintaining traditional firm order requests from faculty and students. We explore the methodology of transitioning acquisition workflows, the rationale behind adopting a user-centric approach, and the implications of this model on aligning library collections with the diverse needs of the campus community. The new collections team at SBUL identified three main goals for this pilot program: 1) enhancing and diversifying the collection, 2) identifying organizational efficiencies, and 3) implementing fiscal controls. The analysis draws on data collected during the pilot to offer insights into best practices for evolving library acquisition strategies in response to shifting user expectations and campus diversity in an environment of organizational constraints.

**Keywords:** Collection development, Acquisitions, Budget, Staffing, Assessment

### **INTRODUCTION**

In the summer of 2023, Stony Brook University Libraries (SBUL) undertook a significant transformation of its subject liaison model, transitioning to a teams-based approach aimed at optimizing resources due to decreased staffing levels and constraints on the collections budget. This strategic shift impacted various aspects of library operations, particularly in workflows related to collection development and materials acquisitions. For over a decade, in addition to providing instruction and reference for their assigned departments, subject liaisons had served as the primary contact for collection requests, assuming responsibility for selecting materials and managing acquisition requests from the faculty and students. However, this traditional model faced challenges, including disparities in funding allocations that were often based on historical spending rather than reflective of current curricula, enrollment trends across disciplines, areas of research focus, or strategic initiatives for the university. Under the new teams-based structure, the Division

of Collection Strategy and Management assumed a central role of overseeing collection development, acquisitions, cataloging, and discovery. This reorganization aimed to streamline operations, allowing for more control of spending and resource allocation across all academic disciplines while ensuring equity and representation of all users across campus.

A pivotal aspect of SBUL's updated approach involves the adoption of a user-centered collection development strategy. The division opted to pilot multiple-publisher Patron-Driven Acquisition (PDA) models alongside traditional firm order requests from faculty and students starting in the fall semester of 2023. Monroe-Gulick et.al (2024) describe PDA as a mechanism by which a patron initiates a purchase through a tool or platform that is put in place by the library. They also note that PDA and Demand Driven Acquisition (DDA) are often used interchangeably but employ the same strategies and core principles. The approach is aimed to democratize the selection of library materials by allowing the campus community to participate in the decision-making process for the collection, thus moving away from the sole reliance on subject liaisons. The decision to embrace PDA models signifies a shift towards greater responsiveness to user needs and preferences. This ensures that even stakeholders who previously had limited interaction with subject liaison librarians are now actively engaged in shaping the Libraries' collection. By diversifying acquisition strategies, SBUL not only enhances accessibility to relevant resources on demand but also cultivates a more inclusive and dynamic scholarly environment.

## **BACKGROUND**

Stony Brook University is an R1 public university located on the north shore of Long Island, New York. The University Libraries have five branches located across three campuses. The university has an enrollment of over 17,000 undergraduate students and 8,000 graduate students. Historically, Stony Brook University is known for its advances in healthcare and the STEM fields. However, the university boasts a strong representation in the Humanities and Social Sciences as well (Stony Brook University, n.d.). The Arts & Humanities and Social Sciences departments engage extensively with the Libraries and rely heavily on monographs for their teaching and scholarship.

The Libraries' primary operating and collection budgets have remained static in recent years despite publisher inflation and a steady increase in the cost of services. This financial constraint has necessitated exploring innovative strategies to address the research and educational needs across diverse programs. One such strategy involved a thorough examination of monograph expenditure allocations to pinpoint areas where historical allocations were no longer relevant. Course offerings and areas of research focus within a school or department change over time; however, those changes were not reflected in the monograph allocations. This new approach aims to ensure that financial resources are directed toward high-demand items rather than adhering to traditional collection-building practices within specific disciplinary fields.

The traditional dispersed model of liaison librarian selectors across various departments within SBUL posed significant challenges in effectively managing collection development goals and optimizing budgetary efficiencies. This decentralized approach made it difficult to align collecting priorities and assess financial allocations holistically. Funds were allocated at the beginning of each fiscal year, but the Collection Strategy and Management Division could only

review and reallocate unutilized funds at the end of the fiscal year. This timing limitation frequently resulted in missed opportunities to address outstanding material requests or to leverage one-time funding opportunities effectively. Additionally, some librarian selectors were purchasing titles to spend down their fund allocation, while others were unable to fill faculty and student requests because they had already depleted their modest allocation.

An additional factor influencing the decision to pilot a new collection model was a series of retirements and staff separations that began in 2020, a common issue faced by many academic libraries during the COVID-19 pandemic. The delay in filling replacement positions necessitated the redistribution of material ordering responsibilities among the remaining librarians. Consequently, this redistribution led to several inefficiencies. Funds allocated to certain disciplines remained unexpended as the acquisition of materials in these areas relied heavily on a small subset of librarians who were also taking on expanded teaching and reference duties. This small group faced challenges with awareness of the types of resources, vendor contacts, or best practices for collecting in a particular discipline.

These factors collectively highlighted the limitations of the existing collection development model at SBUL. The inability to reallocate funds efficiently and the uneven distribution of acquisition responsibilities underscored the need for a comprehensive reassessment of the Libraries' collection management practices. Several unsuccessful attempts had previously been made to provide equity within this traditional allocation model. It was ultimately decided that a new centralized patron-centered model was the most equitable approach. A collection development team, comprised of four acquisitions faculty and staff, was developed, and this team took on the role of selector based on discipline. One member of the team was designated to each of the major disciplinary areas on campus: STEM, Social Sciences, Health Sciences, and Arts & Humanities. The collections team worked in close consultation with the librarians now focused on reference and instruction to ensure an open flow of communication regarding requests, acquisitions, and cancellations.

## **GOALS**

The collections team recognized the necessity of leveraging existing relationships with publishing partners and vendors. By investigating alternative approaches, the collections team aims to develop a more integrated and responsive collection development strategy that aligns with contemporary academic needs and budgetary constraints. This shift seeks to enhance the efficiency and equity of resource allocation and improve the overall effectiveness of SBUL's acquisition processes.

The collections team initiated this pilot project with the following goals in mind:

### **Goal #1: Enhance and diversify the monograph collection**

The team primarily wanted to expand users' access to library resources by offering a more extensive catalog of books. The titles available through the PDA program exceed the number the Libraries could afford to purchase individually. Instead of buying individual titles by request or in anticipation of user needs, the PDA program provided the SBU community with a wide selection of titles, allowing users to determine which would remain in the catalog based on collective usage.

This approach enabled the provision of the maximum number of titles to users while adhering to a strict budget.

The liaison librarian model, which relied on user requests and librarian selection for new book purchases, often resulted in gaps in the collection. According to IPEDS data for the fall 2022 semester, Stony Brook University has reported a diverse student body (IPEDS 2023a).

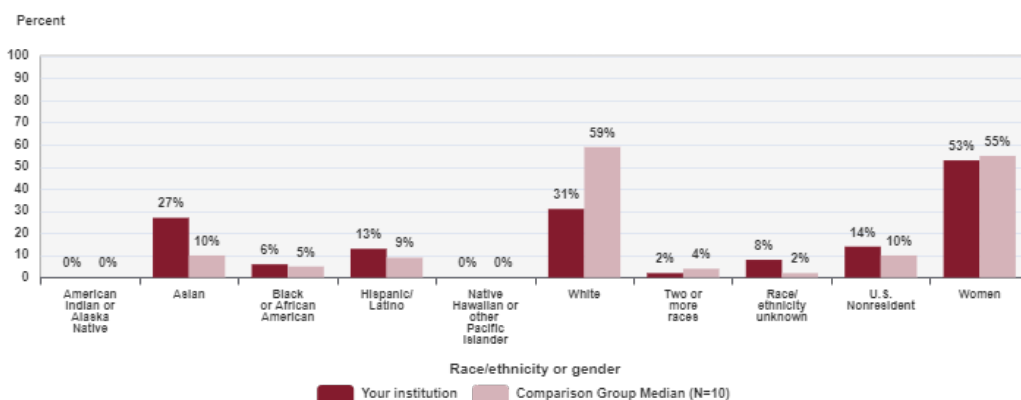


Figure 1: IPEDS SBU Fall Enrollment

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Spring 2023, Fall Enrollment survey component. <https://nces.ed.gov/ipeds/dfr/2023/ReportHTML.aspx?unitId=196097>

Having librarian selectors and teaching faculty make the final purchase decisions may lead to the underrepresentation of diverse viewpoints and voices in the collection. The PDA program, by involving a broader range of users in collection building, presented an opportunity to diversify the collection. By opening selection to all users within the SBU community, rather than just librarians and academic departments, the Libraries hoped to see a more diverse array of titles activated for purchase, thereby filling some collection gaps. While many departments and faculty members had close relationships with librarians under the liaison model, other users might not know how to request needed resources. The PDA program eliminated the need for users to contact SBUL directly to contribute to collection building, which the Libraries hoped would serve the needs of the Stony Brook community more effectively.

## Goal #2: Identify workload reductions and organizational efficiency

In the previous liaison model, all librarians acted as selectors. This led to individual orders and ordering practices, varied communication frequency between the selectors and the acquisitions team, and urgent requests that required acquisitions staff to deviate from standard practices. Additionally, there was inefficient communication with publishers. Often, serials renewal quotes were sent to monograph selectors, which led to occasional missed invoices. Under new leadership, the Collection Strategy and Management Division had specific goals to update workflows and management of the acquisitions processes; however, having the entire library faculty involved in purchasing made it challenging to implement these strategies. Reducing the number of librarians

involved in the acquisitions workflow was necessary to implement and organize change. The shift to the collections team centrally managing the monograph acquisitions, however, did result in a significant workload increase for this team, particularly at the beginning of each semester when requests peaked. Most purchase requests originated from subject areas within the Arts & Humanities. Ideally, the implementation of a PDA program would pre-emptively provide access to titles likely to be requested by users, thereby reducing the volume of purchase requests received by the Acquisitions department and alleviating some of the manual effort involved in the selection and processing of new titles.

### **Goal #3: Fiscal control**

The third goal was to increase control over the monograph budget. As previously mentioned, the Libraries' budget has been flat for several years despite inflationary pricing on most of our serials packages. SBUL has worked diligently to protect its monograph program, but to do so, efficiencies would need to be identified. A PDA program with generous purchase thresholds was selected. The intention was to reduce cost per use by allowing for multiple views before purchase while ensuring that the Libraries are expending funds on high-demand titles.

With selection distributed across the Libraries, it was difficult to apply standards such as format preference, preferred vendors and platforms, and invoicing protocols. Multiple fund codes across several disciplines created obstacles for tracking expenditures and balances. Many funds had active standing orders established several years prior and were no longer relevant to the curriculum. Selectors who may have inherited these funds after a retirement or reassignment were often unaware of the standing orders and their use of funds. Historical fund codes that did not have specific librarian selectors assigned would remain until end-of-year reporting, leading to missed opportunities to take advantage of publisher promotions and, in some cases, satisfy the requests of faculty and students. Rolling up the fund codes into four broader disciplinary areas (STEM, Arts & Humanities, Social Sciences, and Health Sciences) has made it possible for SBUL to pursue a PDA model that includes titles across disciplines. The intention is to improve equity and allow for purchases to be made with more flexibility than with the traditional fund code allocations.

## **LITERATURE REVIEW**

Library experiences with PDA programs are well-documented in scholarly literature. For over a decade, libraries have been testing the effectiveness of PDAs, or “just in time” method, as a supplemental or alternative selection model to traditional librarian selection, or “just in case” method. The traditional selection method of “just in case” involves monograph selection by librarians and approval plans for collection building. Due to widespread budgetary constraints in academic libraries, the “just in case” selection model is often no longer feasible due to the low usage of titles selected by librarians and approval plans (Lim Li Min & Casselden, 2021; England & Anderson, 2019). PDA models offer the opportunity for libraries to build a collection based on what users actually need, which results in a collection of materials current and future users are more likely to find useful (Tyler et al., 2013; Downey & Zhang, 2020). Librarians have reported some drawbacks to PDA models, including the concern that user-selected titles will address immediate user needs but may not necessarily align with the long-term goals of the library (Lim

Li Min & Casselden, 2021). Many libraries have found a mixed-method approach to selection to be most effective, combining traditional librarian selection with PDA programs to ensure balanced collection building (Blume, 2019).

For many libraries, the primary motivation for participation in PDA programs is the ability to open a large collection of titles to users on a small budget. Nearly all library reports on PDAs found budget savings while using this selection method (Lim Li Min & Casselden, 2021; Downey & Zhang, 2020; Denker, 2018; Hart et al., 2022; Veeder, 2018; Rogers, 2018; Walker & Arthur, 2018; Arthur & Fitzgerald, 2020). A major component of these cost savings is the high usage on user-selected titles, resulting in lower cost-per-use on PDA titles. Walker and Arthur (2018), Rogers (2018), and Tyler et al. (2013) all compared monograph usage based on purchase type and found higher usage on user-selected titles compared to librarian-selected titles or titles purchased through approval plans. Downey & Zhang (2020) looked at long-term usage of PDA purchases and found that all titles had use in their first year after purchase, and 20% still had usage after their fifth year.

Libraries report mixed results on the potential workload reduction for librarians while participating in a PDA program. Some libraries opted for a selector-mediated PDA program, necessitating librarian intervention in purchasing user-selected titles (Downey & Zhang, 2020). England and Andersen (2019) pointed to the required PDA maintenance as an additional workload burden on librarians. Hart et al. (2022) note the monitoring and collaboration needed to make a PDA program successful. For other libraries, the automation of PDA programs freed up time for librarians by “allowing the process to move from title selection to discovery to purchase with as little staff intervention as possible” (Arthur & Fitzgerald, 2020, p. 1). However, Buck and Hills (2017) reported that while initially the PDA program resulted in time savings for librarians, the rising costs of materials required librarians to mediate purchases, lessening the benefit of the PDA’s automation capabilities. Additionally, libraries have cautioned that while the PDA automation is efficient, frequent evaluation of the library collection is necessary “to ensure they support the teaching, learning and research needs of the university” (Lim Li Min & Casselden, 2021, p. 1).

Due to concerns over the quality of user-selected titles, libraries have also closely analyzed the titles purchased through PDA programs. Overall, libraries found a high-quality and balanced selection from users (Tyler et al., 2019; Arthur & Fitzgerald, 2020). This can often be attributed to the title pool selection for the PDA program, which was initially done by librarians. Several libraries based their title pool on existing approval plans with vendors (Downey & Zhang, 2020; Veeder, 2021; Arthur & Fitzgerald, 2020). However, concerns persist over the potential collection gaps while relying on user-selected models. Blume (2019) found some subject areas underserved by a PDA model alone. This is of particular concern for making sure libraries represent diverse perspectives and minority voices. Blume (2019) notes the potential difficulty for diverse authors to publish in big-name presses, which are the main contributors to PDA title pools. Arthur & Fitzgerald (2020) suggest regular evaluations of subject areas collected from PDA programs to ensure balanced collection building, and Blume (2019) specifies the importance of librarian intervention to make sure diverse voices are included.

Diversity audits are one method of checking library collections for balanced representation. Academic libraries have historically centered whiteness in their collections, which makes collection evaluation necessary, but diversity audits are most often reported by school and public libraries (Shotick, 2024). Three popular methods for library diversity audits are author identity

analysis, subject heading review, and the checklist method/reverse audit. Author identity analyses focus on the author's authority to tell the story of marginalized people by researching their race, ethnicity, gender, and potentially other factors as well (Wood, 2021; Shotick, 2024; Emerson & Lehman, 2022). Subject heading reviews most often use Library of Congress Subject Headings (LCSH) to check the subjects covered by titles in a collection (Wood, 2021; Proctor, 2020; Fischer, 2023). The checklist method, or reverse audit, checks an existing collection for award-winning or award-nominated titles related to diversity (Proctor, 2020; Bradley-Ridout et al., 2023). All methods have their limitations, so sometimes a mixed-method approach is performed. For example, checking for specific LCSH in a collection and evaluating individual titles for data points like authenticity and author positionality (Wood, 2021), or searching the collection by LCSH and checking the collection against award lists like Lambda Literary and Stonewall Book Awards (Proctor, 2020).

## METHODOLOGY

In order to determine if the PDA program met the established goals of diversified collection building, workflow reduction, and budget efficiency, the collections team employed quantitative and qualitative approaches to assess the PDA program's effectiveness in these areas at the end of the academic year.

To evaluate the impact of the PDA program on diversified collection building, the collections team adapted methodologies from library diversity audits, focusing on a subject review method rather than an author identity evaluation or checklist method, which were unsuitable for this type of diversity audit. As a first step, the collections team retrieved LCSH for all PDA-purchased titles from the Library of Congress public catalog. For titles not available in the public catalog, an SBUL cataloger consulted OCLC records to determine the relevant subject headings. The Cooperative Computer Services created a diversity audit tool in Tableau that analyzes titles based on LCSH in seven categories: women, BIPOC, LGBTQIA+, disabilities/neurodiversity, religious minorities, immigrants, and low-income/economic welfare (Fischer, 2023). The collections team adopted these categories for the evaluation of purchased PDA titles and manually reviewed the LCSH data to assign each title one or more of these DEIA-related categories. Finally, the collections team searched the entire library book collection, excluding the new PDA titles, for the subject headings assigned to the purchased PDA titles to assess the collection-building impact of the user-selected titles.

This methodology has some limitations. As Fischer (2023) noted, the subject heading review approach is constrained by the data available in bibliographic records. This method does not capture author characteristics and sometimes omits nuanced content related to diversity and inclusion present in the monographs. Also, assigning subject headings to DEIA categories was sometimes challenging due to indirect relationships between subject headings and DEIA themes. For example, topics like sustainable development that impact marginalized communities affected by climate change required careful consideration to determine their inclusion.

Measuring workload reduction posed challenges as this was the first year that the collections team managed all material ordering for the university. However, an analysis of subject



areas assigned to purchased titles could affect the amount of direct purchase requests received in those areas. The collections team also reviewed the implementation of the PDA program to estimate the workload required for maintenance of the program.

Finally, to evaluate budget efficiency, the collections team calculated the cost per use of the PDA program, which was determined by total usage and total investment. The usage data collected through COUNTER reports included the use of all ebooks accessed through the PDA program, including those that were not ultimately purchased. The cost per use was calculated by dividing the total investment by the total number of uses.

## FINDINGS

The evaluation of SBUL's 2023-2024 ebook PDA program revealed several key outcomes in the areas of collection enhancement and diversification, workload reductions and efficiency, and fiscal control.

### Goal #1: Enhance and diversify the monograph collection

The PDA program allowed SBUL to provide access to a catalog of 18,000 titles to the campus and relied on user-selection to drive purchasing decisions from that title pool. Further evaluation revealed that the PDA program successfully contributed to diversifying the collection. Of 169 purchased titles, 106 were assigned LCSH related to DEIA categories, which is about 63%. The distribution of these DEIA-related titles was as follows: 24 titles related to women (14% of the PDA set), 72 titles related to BIPOC (43% of the PDA set), 10 titles related to LGBTQIA+ (6% of the PDA set), 2 titles related to disabilities/neurodiversity (1% of the PDA set), 13 titles related to religious minorities (8% of the PDA set), 2 titles related to immigrants (1% of the PDA set), and 6 titles related to low income/economic welfare (4% of the PDA set).

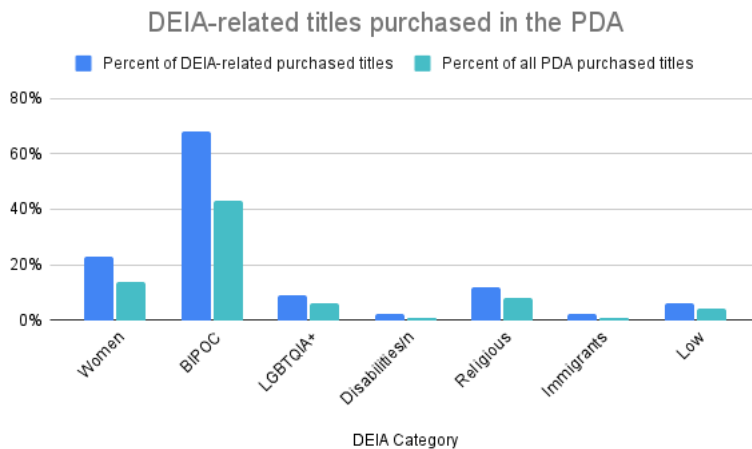


Figure 2: DEIA-related titles purchased in the PDA

This distribution shows a heavier focus on subjects related to women and BIPOC compared to other categories, so the diversification benefits were not entirely balanced. Analysis of the existing library collection against these DEIA categories revealed that the PDA program helped address gaps in representation. SBUL's holdings were searched for the LCSH assigned to the purchased PDA titles to determine the added benefit in those specific areas. Altogether, these subject headings were represented in 27% of the Libraries' print and electronic monograph collection, demonstrating significant areas for improvement that the PDA purchases assisted with.

Overall, the PDA program successfully contributed to a more diverse collection, though future efforts could benefit from further curation to address the underrepresented DEIA categories. This evidence supports the conclusion that the PDA program has been effective in diversifying the Libraries' collection while also demonstrating areas for potential enhancement.

### **Goal #2: Identify workload reductions and organizational efficiency**

Implementation of the PDA required more intensive upfront work than initially anticipated. In particular, the logistics of establishing the PDA contract and selecting titles for the program were more time-consuming and complex than expected, resulting in a delayed start date. During the title selection process, librarians involved in the PDA's implementation meticulously reviewed a potential pool of over one hundred thousand titles to determine which should be included in SBUL's program. Considering this was a pilot project with limited funds allocated, the selection process needed to be rigorous. The librarians first narrowed the list by subject matter, focusing on addressing collection gaps in the Arts & Humanities. Titles outside these subject areas and those in foreign languages were excluded from the pool.

Once the contract and title selection were finalized, implementing the PDA across the Libraries' platforms required additional time and effort. The PDA vendor provided discovery records but did not offer an automated method to match these to community zone records in Alma, SBUL's Integrated Library System (ILS). Assistance from the SBUL's cataloging department was required to ensure the records were imported into Alma as local records. To adhere to best practices, the team manually activated community zone records for all titles activated for purchase in the PDA program. These community zone records were also moved into a new electronic collection in the ILS to separate purchased titles from those that were visible as PDA titles. This approach allows for the regular removal and update of PDA titles through discovery record import without affecting owned ebooks already purchased through the program and will hopefully reduce the amount of maintenance required to keep the PDA running.

After this upfront work and adjustment were completed, the PDA required little intervention aside from weekly budget monitoring and ILS collection maintenance. However, the evaluation encountered limitations regarding workload reduction compared to the previous year. While there was observable potential for reduced material requests since the PDA's large catalog offerings in the Social Sciences and Arts & Humanities areas likely removed the necessity for some manual requests, there was no definitive data to substantiate this claim. This was the first year of the collections team's responsibility for all material ordering, and without comparative data from previous years, no conclusive statement on workload reduction could be made.

### **Goal #3: Fiscal control**

A primary concern during the planning and implementation of the PDA program was the potential for overspending on a tight budget. Two PDA titles reached their access limit before the discovery records were even loaded into the catalog, raising concerns about how users were discovering these titles. Users likely found the PDA titles on third-party websites like Google Scholar, which could lead to more usage than the Libraries' budget could accommodate.

SBUL closely monitored spending on the PDA program and noted increased expenditures over time. During the program's initial weeks, approximately two to four titles were activated for purchase per week. By the second month, this increased to about eight to ten titles per week and continued to rise thereafter. To manage the increased spending, SBUL decided halfway through the fall semester to reduce the number of titles in the PDA pool, restricting them by publication date to only include titles published in 2014 or later. This removal reduced the selection pool to just over 18,000 titles. Spending slowed to a manageable pace following this adjustment. However, generating new discovery records from the PDA vendor necessitated shutting down the PDA program for several days and a full update of our catalog holdings. To prevent the need for future title removals, SBUL plans to maintain the publication date restriction.

Overall, the program offered access to a vast catalog of approximately 18,000 titles for a moderate budget investment, with a calculated cost per use of \$4.99. In the 2022-2023 fiscal year, SBUL monograph spending for the Arts & Humanities and Social Sciences was \$38,210.67 and \$11,519.85, respectively, for a total investment of \$49,730.52. With the implementation of the PDA program, focused primarily on the Arts & Humanities and Social Sciences, the monograph spending dropped 56% (\$24,098 for Arts & Humanities, \$3,814.48 for Social Sciences) while still opening a large catalog of titles and being responsive to requests. This indicates that the program provided a cost-effective way to access a wide range of materials, and the usage data revealed continued use of purchased titles, with some ebooks showing 50+ uses throughout the academic year.

## CONCLUSION

SBUL's transition to a user-centered approach for collection development represents a proactive response to staffing challenges, aiming to maintain high levels of faculty engagement while fostering a more equitable distribution of resources across academic disciplines. Through the introduction of PDA models SBUL has managed to diversify the collection, empower the campus community to participate in shaping the collection profile, and find efficiencies such as on-demand access and multiple use allowances prior to purchase. SBUL identified the PDA as a successful pilot and plans to explore options for expansion with additional publishers and disciplines to continue meeting the evolving needs of the campus community.

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