Attendees were divided into 4 groups and considered each of the following four topics:

Do you market your PDA/EBAs to staff and students?

How do you analyse usage? What do you measure, and how?

What do we need from suppliers in order to make PDA/EBA work better?

How does PDA/EBA fit within your existing content budget?

Do you market your PDA/EBAs to staff and students?

Most institutions had much the same attitude to marketing.

'Day-to-day' electronic PDA/EBA

- In general this isn't marketed. This is primarily to discourage triggering purchases for the sake of it. There was seen to be no need to market this as the books are available for all via catalogues & discovery services, which is promotion enough.
- Retrospective promotion happens in some libraries where lists of titles or spends per subject were promoted at Programme Committees/Boards.
- One institution saw some resistance to students buying their own reading where it was felt academic staff should be in sole charge of choice.
- One institution's VC and Senior Management Team heard about PDA and felt that this was such a positive scheme it should be publicised to staff and students, but the size culture of the HEI was quite different to the larger libraries also represented.

Print & video PDA

- These tend to be publicised, and in some institutions the money for print goes very quickly. Other Libraries have a spend-o-meter on the website so uses know how much is left in order to manage expectations.
- As the print books aren't available in the same was as e-PDA is it's felt that it's more important to market this.
- Those institutions who did run a print PDA felt that it was very well received and an excellent marketing opportunity for the Library.
- Video PDA tends to be marketed as it's a new service and use is encouraged.

Issues & comments

- It was discussed that when marketing did happen it was usually about marketing the concept rather than the content available.
- There had been negative comments when books part of an EBA were removed from a catalogue and there was a worry that publicising an EBA only to then not purchase items that had been used may be a negative experience.
- It's important to run PDA at different times of year to ensure coverage of different modules. However, you run the risk of very specific titles being bought if it's run at dissertation time so a loan model may be more appropriate at this time.
- Important to discuss with library colleagues what PDAs & EBAs are running so that they're in a position to liaise with academic staff and promote to Student

Ambassadors/Champions, and so that front-facing staff can promote at the helpdesk and elsewhere.

How do you analyse usage? What do you measure, and how?

BR2 – counter reports

- There is a formula for non BR2 that convert BR1 x 5 (this can sometimes be too high)
- Cost per use, but need a range of these to provide a useful benchmark
- Number of uses/ downloads
- Problem with eBook usage is the standard measure – this is not standard across the publishers. Can be pageview, chapter or section request.
- Problem with type of eBooks being measured - e.g. some platforms do not allow for breaking up subscriptions, PDA and outright purchases.
- Short term and long term usage
- eBook packages compared to other types of eBook purchases
- EBA statistics used to purchase titles
- Average time spent in a book

Ways that BR2s and other statistics are used:

- PDA usage compared to reading lists usage – referring to BR2s. In order to get reassurance that pda was worthwhile. Against traditional eBook purchase (Reading Lists).
- Useful to evidence purchasing models with colleagues, senior managers, academics and students. ROI
- Used to evidence improvements with NSS and other surveys with end users.
- Review PDA and Non- PDA content collect statistics to help with financial planning
- Cost per download used to help with PDA and Non-PDA content
- eBook packages reviewed annually
- Usage of eBooks in EBA collections

Improvements from Suppliers and Publishers:

- More consistency of features to disaggregate types of eBooks to allow for genuine comparison
- Standardized measurements for pageviews/ chapter downloads etc.
- Dashboards to allow for cross tabulation
- Improvements would allow for a more planned approach rather than reactive.
- Counter reports do not contain useful contextual data such as subject headings or classifications schemes (not sure suppliers can do this)

What do we need from suppliers in order to make PDA/EBA work better?

Content

More content available.

More up to date content available

Unique identifier for content (to facilitate de-duplication etc).

More clarity/transparency/honesty about content they cannot get and why *(see also under 'communication')*.

Accessibility needs to be improved – DRM free *(see also 'Platform…')*.

Stable list of content.

Ability to add single titles to collection.

Platform/functionality/model

Simplicity/ease of use – for students & librarians.

Consistency of information between systems.

Consistency of models.

There needs to be a discussion around publisher business models to look at more sustainable options to make our goals more achievable.

Consistency of experience for students (thus reducing confusion for students and staff time required to support them).

Intuitive platform.

Help videos.

Most students want to access ebooks like journals.

Accessibility needs to be improved – DRM free.

Profiling & set up

More automation to help us get up and running.

More streamlined and less labour intensive for us to set up.

More help with profiling.

Profiling needs to be easier for us to do ourselves.

More reliable data (Des gave examples of needing to do a lot of work to 'clean up' data where profiles had not been adhered to, thus affecting confidence in the integrity of the data).

Communication

Better dialogue with publisher/supplier.

Better cooperation between aggregators-publishers-libraries

Publishers need to be more responsive to libraries' needs and learn to understand the sector. (Aggregators understand us better).

Lack of understanding of end users. For example it is not acceptable for suppliers to expect us to fit in with their timescales relating to upgrades/data migration etc.

More joined up thinking between sales staff and technical staff. (Examples were given of sales reps who were unable to answer our technical questions which impeded informed decision making when considering possible new suppliers of at the implementation stage).

Too many assumptions made by suppliers. We need more helpful information.

Better quality information:

- Granular usage stats.
- More granular analysis to help us plan more effectively
- Predictive spend patterns to enable us to plan and allow for continued use over closed periods.
- Dashboard – bespoke. To enable us to present information to our management teams (possible link with JUSP?).

Better reporting mechanisms:

- Alert mechanisms that actually work

Transparency:

- More information upfront before commit money.
- More clarity/transparency/honesty about content they cannot get and why.

Timely/real time information (invoicing /expenditure) *Askews do provide real time updating on financial information*

Request button to vote for content that is not available.

How does PDA/EBA fit within your existing content budget?

PDA

Is usually top-sliced
Some institutions use yearend funds to either start a new PDA plan or top up an existing one
Typically used to purchase material not on reading lists (apart from MMU, cf their earlier presentation, and Huddersfield who are trialling a similar approach)
Adding specific titles to a PDA plan (e.g. missing books, interlibrary loan requests) rather a plan based on subject profiling is quite common
Subject profiles often set up to target areas that need improving, e.g. subjects with low NSS scores

EBA

Most commonly funded using yearend money

Viewed as nice to have if funds are available, rather than being integral to purchasing strategy End result can be overpayment with publishers if usage turns out to be low
When repeated annually with the same publisher it effectively becomes a subscription
Doesn't always give much control over subject areas - one institution (Manchester) has created approval plans in certain areas to redress the balance and strengthen weaker areas of the collection
The statistics provided by publishers often lack contextual info and granularity, so it can be difficult to make informed decisions
Lancaster talking to ProQuest about EBA for primary research databases and noted that Cengage offer something similar

Publisher turnaway reports

Interest in using these to identify possible purchases at the title and/or collection level but no-one has the time to do this systematically.Is this an area JUSP could help with?

Budget structures

A number of institutions have a single budget for all reading list orders, and another for non-reading list orders (supplementary reading, researcher requests etc)