PATRON DRIVEN ACQUISITIONS
PATRON DRIVEN ACQUISITIONS

Lessons Learned: Starting a successful Patron Driven Acquisitions program
Maki Yiu, MLS
Weston University

Vendor Evaluation
PROCEDURES
- Bidding
- Negotiation
- Qualifications
- Experience
- Customer Service
- Pricing

Lessons & Trends
- MARC Records
- Future Trends
- Training
- Patent & vendor

Integration and Uplift
- New patrons
- Increased usage
- Improved library

Challenges & Lessons
- Timeline
- Budget
- Resources
- Marketing
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Heidi Vix, MLS
Webster University
Vendor Evaluation

**Pricing**
- Fee
- License Terms
- Multi-user, single-use
- Changes

**Usage**
- M1 to M4
- Subscription
- License

**Collection Assessment**
- Software
- Hardware
- Subject to subject areas
- VRI/PO/WS
- RIA for technology
- How owned, online vs print?

**Triggered Purchases**
- Materials, paper, prints
- Licenses

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*Heidi Vix, MLS*
*Webster University*
Vendor Evaluation

Pricing
- Fees
- Loans/Leases
- Multi-use vs. Single-use Charges

Collection Assessment
- Subject sets
- Strength in subject areas
- YBP/GOBI
- Collection deduping
- Items owned after purchase?

Usage
- Multi-use
- Auto purchase
- Loans/Leases

Triggered Purchases
- Minutes, Pages, Prints
- Loans/Leases
Pricing

Fees

Loans/Leases

Multi-use vs. Single-use Charges
Collection Assessment

Subject sets
Strength in subject areas
YBP/GOBI
Collection deduping
Items owned after purchase?
Usage

Multi-use
Auto purchase
Loans/Leases
Triggered Purchases
Minutes, Pages, Prints
Loans/Leases
Vendor Evaluation

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- Multi-use
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Triggered Purchases
- Minutes, Pages, Prints
- Loans/Leases
Set-Up and Upkeep

Pilot Program
- Setting for patron purchases
- Short Term Loans
- Price Caps
- Files Uploaded
- Deciding to continue

Day-to-Day Workflow
- Weekly Record Loads
- Liaison Orders
- FDA Removal

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Set-Up and Upkeep

Pilot Program
Settings for patron purchases
• Short Term Loans
• Price Caps
Files Uploaded
Deciding to continue

Day-to-Day Workflow
Weekly Record Loads
Liaison Orders
PDA Removal
Pilot Program

Settings for patron purchases

- Short Term Loans
- Price Caps

Files Uploaded

Deciding to continue
Day-to-Day Workflow

Weekly Record Loads
Liaison Orders
PDA Removal
949 EXPLANATION: The line to create the item record should be a 949^1 line and should use the following subfields for the data:

- $a = subfield a of the call number
- $b = subfield b of the call number
- $z = marc tag of the call number
- $c = volume field
- $e = copy
- $h = agency field
- $i = barcode
- $l = location
- $p = price
- $m = message
- $x = internal note
- $q = Icode1
- $r = Icode 2
- $s = status
- $t = Itype
- $u = Imessage

So, using that information above and the information from your questionnaire, yours should look something like the following:

949 \$e1$q0$t019$h090$lwwcii$s-$u-$cOnline book: click on above link
Rury, John L., d1951-


250 1 4th ed.


300 1 online resource (x, 284 p.; 24 cm.)

500 Description based on print version record.

504 Includes bibliographical references and index.


650 0 Education, United States. History.

650 0 Educational sociology, United States.

650 0 Social change, United States.

655 7 Electronic books, local.

710 2 ebrary, Inc.

776 Original: z9780415526906|z0415526906|z97804155526937|z0415526930|z0203119193|w(DLC) 2011047598.


947 Eden-Webster: blq, c2013-03.
Day-to-Day Workflow

Weekly Record Loads
Liaison Orders
PDA Removal
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Challenges & Lessons
- Timing
- MARC Records
- Future Thoughts
  - Weeding
  - Keep PDA Vendor?
Challenges & Lessons

Timing

MARC Records

Future Thoughts
Weeding
Keep PDA Vendor?
July / August, 2011
Vendor Evaluations

November, 2011
Selected Ebrary
Finalized Budget

January, 2012
Tech setting arranged

June, 2012
Continue from Pilot

Sept / Oct, 2011
Trials & Webinars

December, 2011
YBP Visit

February, 2012
Loaded Records

March, 2013
≈ 21,000 PDA records
Challenges & Lessons

Timing

MARC Records

Future Thoughts

Weeding
Keep PDA Vendor?


1 online resource.

Description based on print version record.

Includes bibliographical references.

Foreword : Rudolf Arnheim in retrospect / Dudley Andrew -- Introduction -- Rudolf Arnheim, clarity, simplicity, balance / David Bordwell -- Arnheim and modernism /
Challenges & Lessons

- Timing
- MARC Records
- Future Thoughts
  - Weeding
  - Keep PDA Vendor?
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Questions?
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