

Both Just-In-Time and Just-in-Case

The Demand-Driven-Preferred Approval Plan

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While demand-driven acquisition (DDA) or patron-driven acquisition (PDA) focuses on providing library materials at a user's point of need, approval plans attempt to help the library collect everything that might be desired in the future. DDA is the standard method of just-in-time library collecting, while approval plans are a prime example of just-in-case collecting. Therefore, these two methods are often perceived as oppositional library acquisitions practices. Yet, for the start of the 2013–14 fiscal year, California State University, Fullerton's Pollak Library implemented a hybrid approach of DDA and the approval plan, which came to be known as the DDA-preferred approval plan. This study analyzes the cost and number of books acquired before and after the implementation. Findings demonstrate that the library was able to provide access to a significantly higher number of books in the 2013–14 academic year than in the prior year, and spent much less, suggesting that DDA and the approval plan can work together harmoniously for cost-effective collection building.

Approval plans and demand-driven-acquisition (DDA), also known as patron-driven acquisition (PDA), have come to be known as opposing methods of library collection building. With a focus on setting parameters so that books will be acquired soon after publication, but before a user expresses an actual need, approval plans are rooted in a just-in-case model. By contrast, libraries using DDA methods only acquire materials when users directly access or request them, and so, DDA epitomizes a just-in-time approach. However, a hybrid approach, essentially a demand-driven-preferred approval plan, can enable libraries to provide access to more content at a lower overall cost. While approval plans enable libraries to purchase monographs which they then own, DDA plans allow libraries to tailor a grouping of unowned items that library users may access, with the library only expending funds when an item is used. As Alison Scott noted, “The technical innovations that have enabled DDA to flourish have allowed for a harmony to develop between these seemingly conflicting collection development philosophies (just-in-case versus just-in-time).”¹

Pollak Library at California State University, Fullerton (CSUF) has taken advantage of those technical innovations and developed a DDA-preferred approval plan. It is common for an approval plan to be print preferred, paperback preferred, or e-book preferred, meaning that when a book is slated to be sent to a library on the basis of an approval profile, the preferred format is provided if it is available. If the preferred format is unavailable, the approval plan dictates if another format,

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such as a print book rather than an e-book, will be provided. The library still receives the needed content, though it may not be in the library's most desired format. A DDA-preferred approval plan simply means that the library prefers titles eligible for DDA, but will accept and purchase other formats if necessary. If a title can be added to a pool of available DDA titles rather than purchased outright, it will be, but if it is only available for outright purchase, then it will be purchased. After reviewing the inherent differences and similarities between approval plans and DDA methods, this paper details Pollak Library's transition to a DDA-preferred approval plan and provides evidence that the method enables access to more content at a lower cost.

Literature Review

Approval Plans

Noting that faculty, a recognized and influential group of academic library users, often selected library materials before the use of approval plans, Nardini states, "Approval plans killed patron selection."² However, when approval plans first began, the intention was not to kill selection, but to lessen its necessity by ensuring that the library would already own desired materials by the time users needed them. While approval plans and DDA are viewed as opposites, when approval plans were first utilized in the 1960s, their goal was very similar to what we currently refer to as DDA. For example, Abel, whose company introduced the first approval plans, notes, "By virtue of the fact that the approval plan automatically sends into a library all books, or information on them, immediately upon publication, the books needed by faculty, research staff, and/or students are available upon their first perception of that need."³ As DDA enables libraries to provide access to large pools of content that it may not have acquired otherwise, this notion of having content available at a user's first perception of need is also associated with DDA.

The basic structure of the approval plan is that a library will create a profile stipulating the types of materials that the library would like to receive, and when a book fits those criteria, either the book or information about it will be sent to the library. Library staff then review the materials and choose to either purchase or return them. Abel originally considered the libraries' internal review, in which librarians examine each book received and either reject or approve it, to be integral to the approval process.⁴ However, this internal approval and potential return of the materials has been reduced in current practice as libraries often receive approval books physically processed by the vendor, or shelf-ready. In 2006, Jacoby surveyed libraries about their approval plans and found that 9 percent of those surveyed had shelf-ready plans,

while none of them used shelf-ready services five years prior.⁵ Of those taking advantage of shelf-ready services, many no longer reviewed approval receipts. While a follow-up survey has not been conducted, the number of libraries utilizing shelf-ready services has likely grown. Budget downfalls in the years following the survey led libraries to continue to seek savings on operational costs. However, shelf-ready processing of print books with no option of return essentially takes the approval aspect out of approval plans.

Because e-books require no physical processing or use of shelf-ready services, the introduction of e-books into approval plans has once again brought the option of approval or denial back to approval plans. Pickett, Tabacaru, and Harrell describe Texas A&M University's transition to an e-preferred approval plan, in which the library prefers e-books, but accepts print books if electronic options are not available.⁶ They detail the use of YBP Library Services' online e-book approval bookshelf, which includes all e-book titles profiled for the library's approval plan. Librarians visit the online e-book approval bookshelf and choose to either accept or reject individual titles. This mimics a physical bookshelf on which print approval books would be placed for review that was much more common before shelf-ready services were adopted.

DDA and Approval Plans

Current DDA practices in some libraries demonstrate that DDA is actually returning the approval aspect of approval plans. However, users, rather than librarians, approve the titles. For a library to utilize DDA, some mechanism must create a pool of discoverable items for users to select. In many cases, an existing approval plan profile, or a separate profile that employs similar parameter options such as subject and publisher, forms the DDA pool. After first attempting a DDA program providing access to the full catalog of an e-book provider, Fischer et al. found that using their existing approval profile to narrow the offerings was essential to stay within funding restrictions at the University of Iowa.⁷ Because many libraries rely on a profile to define which materials will be available via DDA, Nardini notes that approval profiles are "already an essential piece of patron-driven programs."⁸ While multiple options to create DDA profiles exist, they often mimic approval plan profiles even if not built straight from them. For example, while Southern Illinois University Carbondale (SIUC) and St. Edward's University both opted to create new profiles with an e-book aggregator, rather than using an existing approval profile, their parameters resembled those applied to approval plan profiles.⁹ In initiating the demand-driven e-book program at SIUC, Nabe and Imre noted that the chosen e-book platform, Coutt's MyiLibrary, offered more than 230,000 titles. Therefore, librarians chose to customize the offerings

by “multiple factors including price, year of publication, publisher name, Library of Congress classification, and readership level,” all typical parameters of an approval profile.¹⁰ Similarly at St. Edward’s University, Ferris and Herman Buck created a profile with Ebook Library (EBL) including university presses and academic publishers and focusing on the subjects within the university’s curriculum as specified by Library of Congress Classification (LCC) and keywords.¹¹ Ferris and Herman Buck encountered some undesirable content in the DDA pool, such as cookbooks and juvenile fiction. However, they chose to continue to refine the profile with e-book aggregators, rather than involving their primary monograph vendor, YBP Library Services (YBP). Other libraries, such as Kent State University and Colorado State University, worked with their approval vendor, YBP, to create a DDA profile.¹² Downey explains that Kent State University preferred to use their approval plan vendor because of their “ability to create a very specific profile.”¹³ McLure and Hoseth note that DDA is the “primary purchasing mechanism for both print and e-books” at Colorado State University (CSU).¹⁴ As CSU acquires both print and e-books via DDA, McLure and Hoseth rely on an approval vendor who provides both formats, rather than creating a DDA profile with a specific e-book provider. These two examples, Downey and McLure and Hoseth, show close relationships between approval plans and DDA.

Approval Plans, DDA, and Economics

While both approval plans and DDA have attempted to enable libraries to build collections anticipating users’ needs, both methods have also strived to make the most efficient use of library materials budgets. Librarians have scrutinized the cost effectiveness of approval plans shortly following their inception. In fact, the Third International Seminar on Approval and Gathering Plans in Large and Medium Size Academic Libraries held in 1971 focused specifically on economics. The opening sentence of the proceedings, “Current budget strains on college and university libraries require a stepped-up search for operating economies,” could easily be the first sentence of a recent publication on DDA.¹⁵ Soon thereafter in 1976, Maddox commented that many libraries had begun canceling approval plans because of budget reductions. She criticized the fact that libraries failed “to recognize the inherent flexibility which allows a plan to address a variety of situations effectively.”¹⁶ The cost effectiveness of approval plans continues to be evaluated in recent years. In their analysis of approval plan receipts at two large research libraries, Alan et al. found that their cost per use of approval plan receipts was favorable as compared to previous studies.¹⁷ However, they still questioned if approval plans are an “outmoded collection strategy given the changes in the economic climate.”¹⁸

Just as some libraries initiated approval plans to take advantage of discounted pricing and operational cost savings, many libraries have begun DDA programs for similar reasons. With key goals of cost and space savings, University of Vermont adopted DDA as a primary monograph acquisition method as early as 2007.¹⁹ In describing multiple DDA efforts at University of Alabama at Birmingham, Lorbeer notes that “demand-driven solutions allow librarians to add content without the financial liability.”²⁰ Dewland and See recently developed a list of key metrics to evaluate the DDA program at University of Arizona.²¹ Not surprisingly, Dewland and See’s highest priority metrics directly related to cost per use.

DDA and the Approval Plan at California State University, Fullerton (CSUF)

History

Like other libraries noted, CSUF’s Pollak Library sought to take advantage of DDA’s potential cost savings while increasing the number of available monographs. CSUF, one of the largest members of the twenty-three-campus California State University system, is a comprehensive university of more than 37,000 students. Pollak Library serves a predominantly undergraduate and master’s-level teaching institution. The primary collecting goals are to support CSUF’s current curriculum and students’ research needs. Because of both space constraints and a desire to provide broader offsite access, the library prefers to acquire online versions whenever possible. Having experienced a 77 percent reduction of the monographs budget from the 2006–7 fiscal year to the 2012–13 fiscal year, Pollak Library not only desired a method for cost savings, but found it essential.

Pollak Library had a long-established print approval plan with YBP. While librarians adjusted and modified the approval profile over time, more drastic measures were needed to continue to actively collect monographs. Unlike University of Vermont, Pollak Library intended to keep and improve the approval plan, not replace it with DDA.²² Pollak Library librarians appreciated the known efficiencies of the approval plan, such as the steady, automatic receipt of new shelf-ready materials in high-demand subject areas. However, a significant evaluation was necessary to ensure that useful materials were being received at a reasonable overall cost. Like at other libraries with shelf-ready plans, librarians did not review approval receipts upon arrival.

In addition to the print approval plan, Pollak Library had provided e-books via DDA since 2010. When the e-book DDA program first began, library staff created a profile directly with EBL. However, like Ferris and Herman Buck, Pollak Library librarians noticed issues with

undesirable content in the DDA pool, such as juvenile and popular titles.²³ While St. Edward's University chose to further refine their DDA profile with EBL, Pollak Library incorporated the EBL DDA program into the approval plan with YBP in 2011. The approval plan already dictated the parameters determining whether the library would receive an automatic shipment of a book or an online notification for subject librarians to review. When the EBL DDA program was incorporated into the YBP approval plan, the library adjusted the profile so that if any title to be sent as a notification was also available as an EBL e-book, the e-book was automatically added to the DDA pool. As the e-books were added to the DDA pool, selectors no longer received notifications for those titles. Titles slated to be sent as books continued to be supplied shelf-ready in print format, regardless of whether an e-book version was available.

Approval Plan Analysis and Revision

As the approval plan notifications continued to populate Pollak Library's e-book DDA pool, DDA soon became an integral part of the library's monograph collecting strategy. Previously, for an approval plan notification title to be added to the library catalog, a selector would first select the title and acquisitions staff would place a firm order. Considering both budget restrictions and workflow, only a small percentage of the actual notifications yielded an addition to the collection that users could access. However, since the DDA program was incorporated into the approval plan, more notification titles were added to the catalog, simply due to their availability as EBL e-books. This enabled the library to offer more content without committing to a purchase. To assess possible approval plan adjustments and cost savings for the start of the 2013–14 fiscal year, Pollak Library librarians reviewed the 2011–12 approval plan receipts. The review showed that 33 percent of print approval books sent automatically had been simultaneously available as EBL e-books. Additionally, while the library does not acquire textbooks as a typical practice, many textbooks had been sent on the approval plan. These two facts made it clear that the library needed to examine and adjust the approval plan.

The library already sought to acquire as much content in electronic format as possible, and would have preferred for the print approval books to be provided as e-books when available. The library was aware of YBP's ability to offer e-preferred approval plans, and while such a plan would enable the library to acquire needed content in electronic format, the budgetary impact was uncertain. E-books typically cost at least as much as the cloth list price, and often considerably more. Since the library had been receiving discounted paperbacks on approval when available, rather than full price cloth versions, an e-preferred approval plan could cost considerably more. However, the library's DDA

program already took advantage of the e-book short-term loan (STL) rather than outright purchase. Pollak Library users triggered STLs when they encountered unpurchased DDA e-books and downloaded, printed, or read them online for five minutes or more. After four STLs had taken place, an e-book would be purchased on the fifth use. While STL costs have increased significantly since this analysis took place in early 2013, individual STL costs at that time were typically 10 percent to 15 percent of the e-book list price. For e-books used four or fewer times, the library saw significant cost savings over purchasing e-books outright. However, for those e-books used five times and eventually purchased, the cost per title was greater than if the e-books had been initially purchased outright. By the time an e-book was purchased at full list price, the library had already expended the cost of four STLs. Considering these cost factors of a potential move to an e-preferred approval plan, the library needed to assess if e-books sent automatically as books (rather than notifications) should be purchased outright as the print books had been, or if they should be added to the DDA pool and made available via STL along with the e-book titles for which notifications had been sent.

To predict the possible budget impact of both options, the circulation statistics of the 2011–12 print approval receipts were analyzed. The goal was to determine how many print approval books received would have actually been purchased by one year later if they had instead been DDA e-books available in the library catalog. If the print approval books were being used often, then continuing with outright purchase would be most cost effective. However, if the print approval books were not being used frequently, utilizing STLs would enable access to more content at a lower total cost, at least in the short term. The 2011–12 circulation data clarified that outright purchase was unnecessary for the immediate future. A mere seven print approval titles acquired in 2011–12 circulated five or more times when the data were analyzed in early 2013. With this information, the library determined that if an EBL e-book was available for a title profiled as either a book or a notification, then that e-book would be added to the DDA pool rather than purchased. Since adding to the e-book DDA pool was preferred whenever possible, the library essentially chose a DDA-preferred approval plan.

Workflow Adjustments

While YBP could easily convert the existing print approval plan to the e-preferred option, there was not a method in place to create a DDA-preferred approval plan in which all titles available as e-books would be automatically added to the DDA pool without library staff intervention. Because the library had been receiving DDA records for some time, a workflow was in place to add titles to the DDA pool. Weekly,

a library staff member retrieved all new records generated from notifications and loaded them into the library catalog. Pollak Library librarians hoped that records for all approval plan e-books, both books and notifications, could also be folded into the existing workflow. However, this was not possible.

To make the DDA-preferred approval plan concept work, the library took advantage of two tools within YBP's online selection and ordering interface, Global Online Bibliographic Information (GOBI). For e-preferred approval plans, e-books to be sent as books, rather than notifications, are loaded onto the online approval bookshelf within GOBI for library staff to review weekly. Each title may be either accepted, rejected, or held for further review in the future. Titles that are accepted, or those that have received no response after one week, are automatically purchased. Because Pollak Library sought to add the e-books on the approval bookshelf to the DDA pool, rather than purchase them outright, no existing approval bookshelf actions worked for the library's goal. GOBI also has a feature allowing library staff to select a title for "manual DDA." While a library's DDA pool is likely to populate automatically through bulk additions to the library catalog, GOBI also allows selectors to manually add titles to the DDA pool as needed. Pollak Library chose to combine these two separate GOBI features, the approval bookshelf and manual DDA, to create an action that worked for a DDA-preferred approval plan.

Because the Pollak Library approval plan is technically e-preferred, new titles are added to the approval bookshelf weekly. Each week, rather than individually accepting or rejecting titles on the approval bookshelf, Pollak Library staff designate all titles on the approval bookshelf for manual DDA. While this is a very quick weekly process, it sometimes confuses selectors, since each title displays a status of "rejected from the approval bookshelf," although the title has actually been added to the DDA pool.

Results

Pollak Library modified many approval profile elements for the start of the 2013–14 fiscal year, yet the move to a DDA-preferred approval plan, along with the removal of textbooks in all formats, had the most significant effect. The library had adjusted the approval plan with the key goal of providing access to more valuable content while spending less. Pollak Library met that goal by combining the cost savings of STLs with the detailed options available via approval plan profiling.

After one year, the DDA-preferred approval plan has produced the desired results of access to more content at a lower cost. As figure 1 demonstrates, the number of print books that Pollak Library received from the approval plan fell from fiscal year 2012–13 to fiscal year 2013–14 after the DDA-preferred approval plan was in place. However,

excluding textbooks, the number of desirable titles, regardless of format, remained constant. Consistent with the analysis of the 2011–12 receipts, about one third of the approval books added to the catalog in fiscal year 2013–14 were e-books.

It is notable that while the number of desirable titles received on approval remained consistent from 2012–13 to 2013–14, the total cost of the approval plan was cut in half. As figure 2 shows, approval costs were drastically reduced as a direct result of the DDA-preferred approval plan. Costs represent both the purchase price of print books sent automatically, plus costs for STLs and automatically purchased e-books profiled as approval plan books but added to the DDA pool.

Adding to the analysis titles for which approval notifications were sent, the number of new e-books added to the Pollak Library catalog increases yet again. Although cost savings were an important goal, Pollak Library also sought to increase overall availability of electronic content. As figure 3 illustrates, the total number of e-books added to the DDA pool in fiscal year 2013–14 was more than 20 percent higher than the number added in fiscal year 2012–13 because of the approval plan changes.

As an added benefit of the approval plan cost savings, Pollak Library subject librarians had more funds to select needed books for firm order, regardless of format. Anticipating that the total amount spent on monographs over the course of the year would be less than budgeted, selectors began adding titles to "wish list" folders in GOBI early in fiscal year 2013–14. When the actuality of the savings was clear by the fourth quarter of the fiscal year, acquisitions staff ordered titles from the selectors' wish lists. To ensure expenditure by the end of the fiscal year, e-books and print titles in stock with YBP were prioritized. As a result of the DDA-preferred approval plan, the library not only increased the number of titles in the DDA pool, but also collected titles that may have been rejected for budgetary reasons in prior years, especially in interdisciplinary subject areas and newer programs. This led to even deeper harmony of both just-in-case and just-in-time collecting, as the use of DDA allowed increased funding for librarian-selected titles which in some cases were only available in print format. As figure 4 demonstrates, the total number of new monographs added to the library catalog increased from fiscal year 2012–13 to fiscal year 2013–14, despite the lower amount spent on the approval plan.

Discussion

Through an analysis of past approval plan receipts and expenses, Pollak Library librarians suspected that a hybrid approach to monograph acquisition, combining both the strength of approval plan profiling and the user focus of

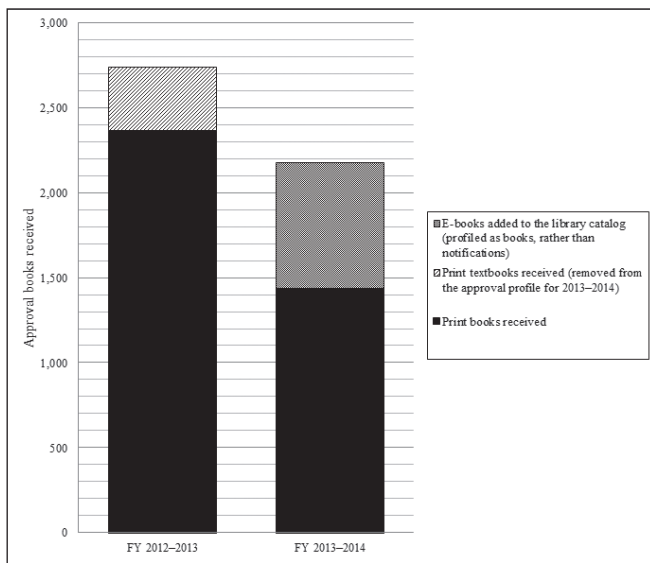


Figure 1. The number of approval books received in fiscal year 2012-13 as compared to fiscal year 2013-14.

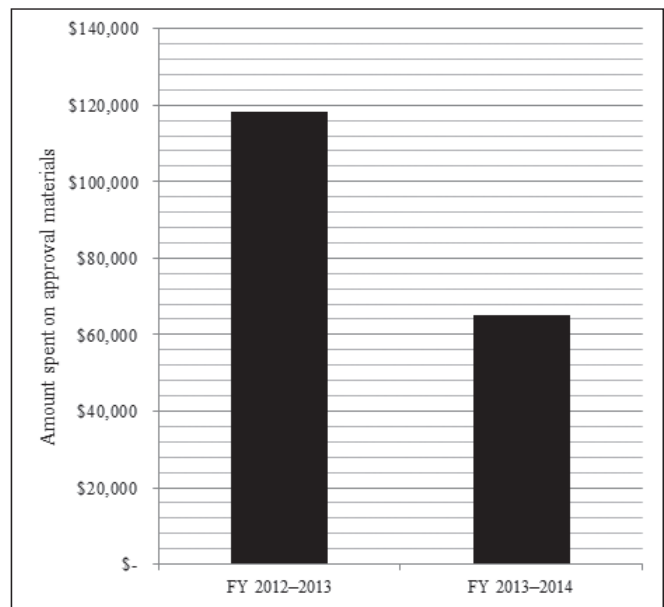


Figure 2. The total amount spent on approval materials in fiscal year 2012-13 as compared to fiscal year 2013-14.

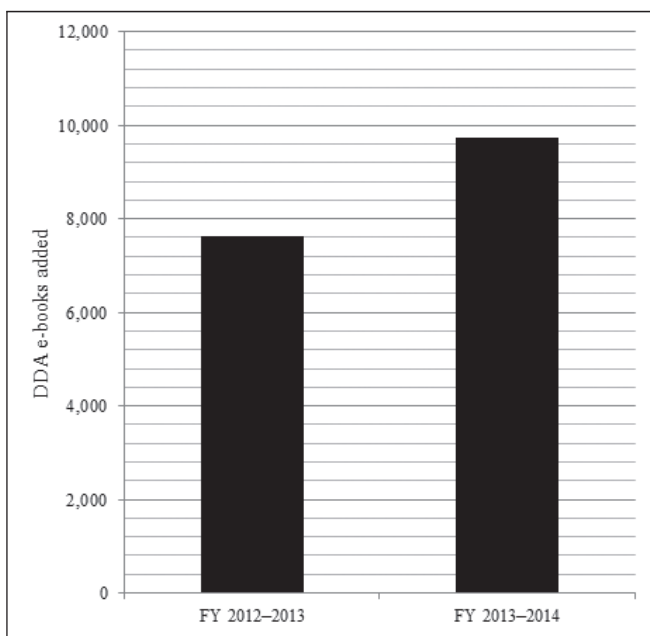


Figure 3. The total number of e-books added to the DDA pool in fiscal year 2012-13 as compared to fiscal year 2013-14.

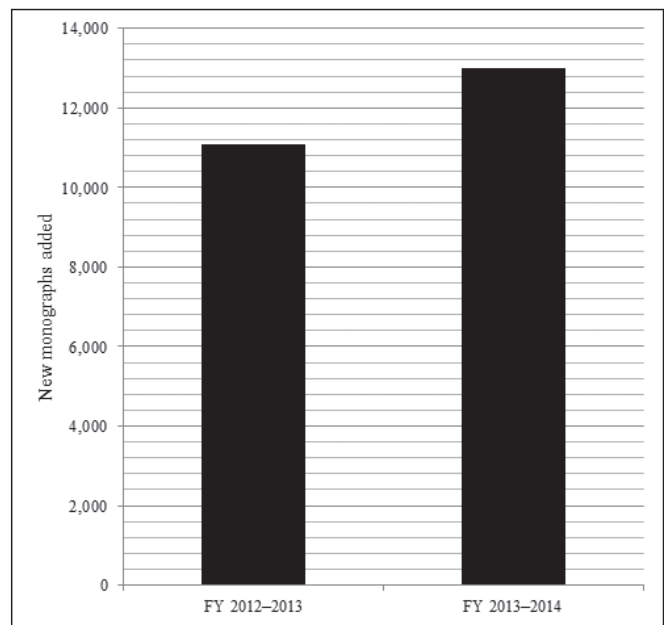


Figure 4. The total number of monographs added to the library catalog in fiscal year 2012-13 as compare to fiscal year 2013-14.

DDA, would enable access to more content while spending less. After revising the approval plan to direct titles to DDA whenever possible, regardless whether they had been profiled as books or as notifications, the library did indeed increase access and reduce cost. As an added advantage, e-books were provided over print versions when available. The data are clear that funds spent on the approval plan decreased significantly after the approval plan adjustment,

while more content became available. This approach assures that the library will regularly receive new publications in the subject areas of primary interest (the strength of the approval plan), and save costs and provide immediate access to unowned materials users may need (the strength of DDA). Through budget savings, it also allows for deeper

collecting through subject librarian selections. As already noted, libraries often create profiles to populate DDA pools, but some libraries have chosen to keep DDA profiles separate from their approval plan profiles.²⁴ This study's findings suggest that combining DDA and the approval plan can offer libraries the ability to provide access to broad collections just in case, while only purchasing them when just-in-time needs present themselves.

As the DDA environment continues to evolve, future study on the effects of the recent STL cost increases will be necessary. The STL's affordability is a key component of the success of Pollak Library's DDA-preferred approval plan. Shortly after the period analyzed by this study (July 2013–June 2014), several publishers increased the cost of individual STLs dramatically, in some cases as much as 900 percent.²⁵ Thus the period analyzed is a limitation of this study. Despite these increases, Pollak Library chose to continue the DDA-preferred approval plan without adjustment for fiscal year 2014–15. Although quite rare before June 2014, library staff members had mediated STLs for more than fifty dollars for some time. This practice has continued, and since July 2014, staff mediate nine high-cost STLs on average per month. Staff approve first requests for high cost STLs. However, after assessing costs and potential future use, occasionally staff authorize a purchase on the second, third, or fourth STL request, rather than the fifth as takes place in the unmediated DDA process. Ten months into the 2014–15 fiscal year, the total cost of all DDA transactions were consistent with expectations. However, total STL costs have been higher than the prior year, while total purchase costs have been lower. While data will need to be analyzed closely, it appears that the DDA-preferred approval plan will continue to meet the desired goals of providing more content at a lower cost, despite the increased cost of STLs. This further suggests that the method is a potentially viable model in other library settings.

Conclusion

Using a DDA-preferred approval plan can enable libraries to have the advantage of a closely tailored DDA pool plus automatic shipments of needed materials still only available in print, all while maximizing the amount of content available despite slim budgets. Although some libraries have taken either/or approaches to approval plans and DDA, a harmony of the two methods can ensure access to needed monographs despite the limitations of cost and format. Depending on savings, it can also allow for not only broader, but deeper collections, when savings are applied to focused collection development. Embracing a combination of just-in-time and just-in-case methods can indeed lead to the best of both worlds.

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