# A retrospective look at a DDA-centered collection strategy: Planning for the future of monograph acquisitions

Lindsey Lowry – The University of Alabama
Michael A. Arthur – The University of Alabama
Donald L. Gilstrap – The University of Alabama



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# A Retrospective Look at a DDA-Centered Collection Strategy: Planning for the Future of Monograph Acquisitions

Lindsey Lowry (Corresponding Author)

Michael A. Arthur

Donald L. Gilstrap

The University of Alabama

## Abstract

The demand-driven acquisitions (DDA) model has been established as a standard component of collection development strategies for academic libraries. The University of Alabama's collection development strategy revolves around the large DDA program for acquiring electronic monographs and is supplemented by other methods of monographic acquisitions such as firm ordering, bulk eBook purchases, and more. While previous studies have confirmed the advantages of [Institutions]'s DDA plan early in its implementation, this study explores the long-term effectiveness of the DDA-centered collection strategy, seven years after it was first put into place, and examines the validity of the strategy as one bringing efficiency and high return on investment. Finally, this longitudinal study hopes to substantiate the DDA-centered collection strategy as one that could be a foundational model for other academic libraries to follow.

*Keywords:* demand-driven acquisitions, collection assessment, eBooks, collections development

# A Retrospective Look at a DDA-Centered Collection Strategy: Planning for the Future of Monograph Acquisitions

For many decades in the early 20th century, university faculty played a large role in selecting materials for university libraries. That trend shifted to librarians as the years progressed, with faculty involvement in collection development declining while librarians as expert bibliographers began to take control over the selection of books for the library collection. The arrival and widespread adoption of approval plans around the 1960s and 1970s, wherein the onus of resource selection shifted away from librarians and towards vendors, were attractive to “those libraries which were building comprehensive collections” (Stueart, 1980, p. 206). The approval plan also signaled a new era of collection development strategy, wherein librarians could create and manage approval profiles that drove the vendor selection while supplementing collection development with the traditional title-by-title expert selection. Approval plans had the advantage of allowing expert selectors to spend more time examining the collection for areas of need and selecting materials that would not otherwise come on approval. Conversely, criticisms included the time-consuming nature of creating a working profile, the potential for a plan to be beyond the budget of the library, and general dissatisfaction with the titles that the vendor selects (Stueart, 1980, p. 213-214).

When the availability of electronic resources and eBooks increased rapidly and exponentially around the turn of the millennium, vendors adapted to the new environment by creating a wealth of new models for the sale of electronic journals, eBooks, and databases. Accordingly, the popularity of demand-driven or patron-driven acquisitions (DDA or PDA) models for electronic monographs grew, giving more power to library patrons on the influence of the collection. Collection strategies shifted again to what some call the “just-in-time” model wherein the users' needs are met upon demand. Early patron-driven acquisition models that are still in use today by some libraries allowed users to request items for purchase on demand by completing an online form. The library would then purchase for the collection right away, whether in print or in electronic format or, conversely, procure the item via interlibrary loan. The later DDA models for eBooks capitalized on the widespread availability of eBooks with instant access, allowing a large pool of eBooks to be available and discoverable to users, with expenditures only occurring upon a "trigger," or a usage threshold as agreed-upon in the parameters of the plan. In 2014, the National Information Standards Organization (NISO) codified the recommended practice for demand-driven acquisition of monographs, noting that DDA plans had been embraced due to "the potential to rebalance the collection away from possible use toward immediate need" (NISO, 2014, p. 1), otherwise known as a "just-in-time" approach to procurement of materials rather than "just-in-case." Today, DDA models and the "just-in-time" approach to collection development have afforded academic libraries the ability to meet and adapt to user needs more easily. Indeed, the idea of demand-driven acquisitions for both print and electronic monographs is not a new idea, but rather is one that has been thoroughly established and evaluated in the literature.

The University of Alabama is a Carnegie Classification R1 institution and enrolls almost 40,000 students as of the 2023 academic year. The University Libraries' collection consists of over six million volumes, both print and electronic. The DDA plan for acquiring eBooks with GOBI Library Solutions was first implemented in the spring of 2016 as part of an innovative collection development strategy wherein the acquisition of electronic monographs would center around demonstrated need through demand-driven acquisitions. Additionally, the DDA plan parameters were created based on the existing print approval profile to ensure eBooks available in the DDA pool aligned with the curricular needs of academic programs. Since the starting point of the program, two articles have been published highlighting the implementation process and early assessments of the plan (Arthur & Fitzgerald 2020; Walker & Arthur, 2018). Internal assessments have also been used to adjust the parameters of the plan and to respond to different needs and challenges. Changes to the program over time include implementing automatic user limit upgrades, expanding the DDA pool, and configuring automatic second copy purchases for eBooks that reach a turn away threshold. The program has now expanded such that by 2020, Arthur and Fitzgerald (2020) indicated that the DDA plan had become the primary way in which monographs, print or electronic, were acquired for The University of Alabama Libraries' collection. Today, the DDA plan with GOBI Library Solutions represents the center of the University Libraries monographic collection strategy, supplemented by all other acquisition methods. Now in its eighth year, this strategy has resulted in access to more than 80,000 eBooks, of which more than 26,000 have been triggered or purchased, including over 8,000 via short-term-loan (STL). This plan is supplemented by monographic acquisitions through a few evidence-based acquisition (EBA) eBook plans, eBook package purchases, a print approval plan based on the same profile, and traditional eBook and print firm orders limited primarily to faculty requests.

An additional component to the DDA centered strategy provides University Libraries increased efficiency in acquisitions workflows. EBSCO provides online order integration with University Libraries' discovery service, allowing the titles in the DDA pool to be automatically configured and accessible, and MARC records are generated and delivered for loading into the Ex Libris Voyager catalog. This integration between GOBI Library Solutions, EBSCO MARC record delivery, and automatic order integration with EBSCO Discovery Service, has enabled the

Resource Acquisition and Discovery unit to function effectively with reduced staffing and has permitted a shift of critical staff time to other key projects within the unit and more broadly within University Libraries in support of the current University Libraries Strategic Plan. This reassignment of staffing is made possible because no human intervention, outside of the library user, is required in the course of the eBook lifecycle on the DDA plan, aside from occasional access troubleshooting and collection strategy assessment.

The original study on the plan by Walker and Arthur (2018) referred to the “utility as value” paradigm for eBooks and quantified the high return on investment (ROI) of DDA acquired monographs as compared with traditionally acquired monographs (p. 661). Specifically, the 2018 study found that after sixteen months of implementation, the subject matter distribution of purchased eBooks was comparable to that of traditionally acquired monographs, and eBook titles purchased under the DDA plan provided a greater return on investment than firm ordered monographs (Walker & Arthur, 2018). There is no doubt that determining and assessing a cost-per-use metric (or re-establishing the “utility as value” paradigm for the present study) would quantify the value or return on investment of the eBooks acquired via the DDA plan since its inception; however, additional data analysis points to areas in which success of the collection strategy over the long-term could be measured.

The authors of this article, therefore, set out to explore comprehensive and longitudinal cost and usage data from the DDA plan and explore other key metrics that may address any uncertainties about the long-term effectiveness of the DDA-centered collection strategy. The authors hope to confirm that the DDA centered collection strategy is a sustainable, long-term approach and use the measured outcomes of this analysis as a foundational model for other libraries as well as a basis for progressive and strategic movement toward the future for University Libraries' collection management.

## Literature Review

Over the past twenty years or so, there has been a rise in popularity and availability of eBooks which, in turn, led to the popularity of patron-driven models for monographic eBook acquisitions, commonly known as demand-driven acquisitions (DDA) or patron-driven acquisitions (PDA). Accordingly, there is no dearth of articles in the literature dedicated to demand-driven acquisitions of eBooks in libraries. Articles specifically concerning eBook DDA and PDA programs as well as mixed-format programs examine all aspects of such models, including implementation and revised collection development approaches (Egan, Yearwood, & Kenrick, 2016; Jones, 2011; Levine-Clark, 2010; Crawford et al., 2020), pilot projects (Downey, 2014; Emery 2012; Herrera 2012; Shepherd & Langston 2013), assessments (Bennett, 2016; Fischer et al., 2012; Gilbertson, McKee, & Salisbury, 2014), comparisons of librarian-mediated purchases versus patron-driven purchases (Shen et al., 2011; Strothmann & Rupp-Serrano, 2020; Tyler et al., 2013) and of course criticisms of patron-driven methods (Sens & Fonseca, 2013).

Scholarship concerning implementations of PDA or DDA plans, whether eBook or mixed format, began to appear regularly in the literature around 2010, just as eBook publishing and availability began to grow rapidly. One such article highlighted the implementation of a patron-driven acquisition model at University of Denver, noting that, at the time, there were not enough scholarly monographs available electronically to fully meet users' needs for instant access (Levine-Clark, 2010, p. 203). Levine-Clark (2010) also highlighted many concerns about the DDA model, including the potential for overspending, the perceived lack of fiscal responsibility, and minimized oversight of the selection and acquisitions process. Like the University of

Denver, the University of Iowa also began an unmediated patron-driven acquisitions eBook program and analyzed the purchases on that plan by call number range (Fischer et al., 2012). During the implementation, the University of Iowa loaded approximately 19,000 eBook records for the PDA program into the local catalog, quickly seeing usage and triggers accelerate. After adjustments over time and assessment at twelve months, the researchers analyzed purchases in the PDA plan by LC call number range, finding medicine, sociology, and economics to be the most frequently purchased subject disciplines. Fischer et al. (2012) offered a few theories on why certain subjects saw more purchases than others in this study, including that certain disciplines may be more comfortable with the eBook format or that the permanent collection lacked coverage in those disciplines before the PDA plan was implemented. Interestingly, Fischer et al. (2012) also opined that the data supported "the idea that eBook availability should provoke reexamination of some long-standing collection development policies and practices" such as the hesitancy to purchase test-prep materials, as interestingly, some were the most frequently used titles purchased on the PDA plan (p. 480). The researchers also posited that "PDA seems on the way to becoming, at least for the foreseeable future, a standard part of the libraries' collection development program" despite the criticisms (Fischer et al., p. 470).

Many studies have looked at DDA programs and eBook acquisition through innovative lenses. Carrico et al. (2015) of the University of Florida Libraries undertook a study to better understand the effect that acquisition method had on eBook usage, comparing firm order, bulk package order, and PDA plan acquired eBooks in order to make better decisions about budgeting as well as collection methods and strategies moving forward. The researchers looked at usage and spending across subject areas for eBooks, finding that a PDA model seemed to work best for monographs in the humanities and social sciences when it came to measuring cost per use.

Further while each acquisition method studied had its own merits, the study "legitimized the PDA model for acquiring e-books, especially for HSS [humanities and social sciences] disciplines" finding the method more cost effective than firm-ordered eBooks (Carrico et al., 2015, p. 110). As the PDA plan fell short in STEM and Medical disciplines, the University of Florida Libraries implemented an alternative PDA plan with a different aggregator to focus on these two subject areas.

Tyler et al. (2019) examined citation counts in order to compare the scholarly impact of titles acquired via approval plan, librarian selections, and patron-driven acquisitions. The study hoped to address the criticism that PDA programs result in the acquisition of monographs with "low scholarly merit" (p. 527). The researchers found that their study lent "much needed empirical support" for "critics who have warned against a too eager, uncritical, and comprehensive adoption of PDA as a collections panacea" (p. 549). A further conclusion suggested that "it would seem far too soon to worry over whether selection is dead" as librarian selections outperformed patron-driven acquisition when citation counts were measured, and patrons' selections, in turn, outperformed titles purchased via the approval plan (p. 549).

In 2020, Downey and Zhang performed a cross-institutional study of eBook DDA use, the first such study of the kind, and examined data from eight large academic libraries. The results demonstrated a wide variety of program parameters for each school and confirmed that no two plans were exactly alike, apart from using a common vendor. Interestingly, the results of their study indicated that a higher return on investment (ROI) is achieved through a sustained, straight DDA model without short-term loans, with the caveat that no two institutions' needs and goals are alike.

Prelitz and Roll (2021) examined the history of demand-driven acquisitions through the lens of California State University, Fullerton. Their experience and assessment of the program revealed that tying the DDA plan to the existing approval profile would "allow for a more detailed profile in alignment with the library's collecting strategy and add efficiency to the workflow" (p. 12). The results of the study indicated that the method implemented originally in 2011 was still working despite many changes over the decade, and it continued to result in cost-savings and realized benefits to users during the COVID19 pandemic. Prelitz and Roll (2021) also expressed hope that much-needed improvements to DDA programs may eventually come to fruition as the model continues to evolve, such as more transparency with licensing and access improvements.

Among the wealth of literature on eBook procurement occurs many articles wherein researchers have compared the value, return on investment, and scholarly merit between user-selected or evidence-based purchases and that of librarian or approval plan selected purchases. Strothmann and Rupp-Serrano (2020) of the University of Oklahoma Libraries compared selections made through an evidence-based plan to simulated approval purchases and simulated firm-orders from selectors to see how closely selections might align based on usage rates, finding that librarian selections were more successful than the approval plan in selecting titles that gleaned high usage rates. However, Strothmann and Rupp-Serrano (2020) note that even though the usage of eBooks selected by librarians was higher, both the approval plan and evidence-based plan gave patrons access to more books overall, thus providing appealing procurement options.

Shen et al. (2011) set out to compare the characteristics of titles selected by patrons via PDA to that of librarians from the same list of titles. Interestingly, the results of the study showed that both patrons and librarians selected a high percentage of titles that fell into the Advanced Academic content level, diffusing the idea that patron-driven selections may be of low scholarly content. Shen et al. (2011) also indicated that patron selections represented a higher number of "supplementary" titles which "tend to be more narrowly focused, less essential to core study on a subject, and more useful for specific niche research topics" (p. 213). The researchers go on to assert that these supplemental items may be more appealing to patrons than librarians because of narrow or specific research interests, unknown to librarian selectors, and conclude that "specialized titles might be some of the best candidates to include in a PDA project because they will be discoverable through the catalog but never purchased unless the need arises for that particular focused information" (Shen, p. 214).

Gilbertson et al. (2014) performed an assessment of the PDA plan at the University of Arkansas fifteen months after implementation. The researchers asserted that if patron selected titles were held by many other libraries, as measured by *WorldCat* holdings, then perhaps the selections were "good" purchases. The results demonstrated that 221 of 225 titles that patrons selected were held by more than fifty libraries while admitting that this measurement could be challenged as a way to evaluate the quality of title selection (p. 15). Interestingly, much like the study undertaken by Carrico et al. (2015), the greatest number of titles purchased fell within the humanities.

Studies surrounding eBook usage in general, the acquisition method notwithstanding, also appear frequently in the literature. Fry (2019) examined ten years of eBook usage at institutions within the OhioLINK consortium, utilizing a metric wherein one compares the rate of titles used within a collection vs. titles not used. As a result, Fry (2019) created a large-scale, bird's eye view of the eBook landscape for the consortium and institutions within it. The results of the study demonstrated that almost 100% of the over 100,000 eBooks acquired during the ten-year period incurred use within the consortium, with most of that use occurring within the first year of publication (p. 827). Fry (2019) also found that "use [of eBooks] accumulates over time, so the titles that have been available the longest show the highest rate of use, and groups of titles usually see their biggest gains in use in their first few years of availability" (p. 836). Though Fry (2019) did make comparisons of rates of use among institutions, results show that the "rate of use of any individual institution's collection is dependent on a wide variety of factors, including collection size, the size of the user population, and the institution's curricular foci." (p. 836)

Kohn's (2018) study sought to explore which variables might potentially influence the usage of eBooks, using a logistic regression model in order to establish correlations between the variables and the usage of titles. The results showed that eBooks from the LC Class of *A*, *Z*, and *R* had the highest percentage of titles incurring use, but the study indicated that many factors influencing eBook usage remain unidentified, with variables studied only predicting a 3.96% percent of variation in eBook use. Kohn's (2018) study also examined the relationship between print monograph usage and electronic monograph usage among certain LCCs using the "Percent of Expected Use" (PEU) metric coined by Mills (1982). Mills (1982) explained this metric by saying, "As we would expect a subject area to account for approximately the same percentage of use as its percentage of holdings, by multiplying the use factor by 100, we can determine the percentage the actual amount of use was above or below the expected amount" (p. 6). In other words, the metric is predicated upon the idea that if a certain subject area represented 10% of the collection, to account for 10% of the total use. However, in examining the relationship of PEU between eBooks and print books by LCC, Kohn (2018) found no statistically significant relationship.

Methodology

Collecting the DDA data needed for this study could not be accomplished by manually downloading reports from EBSCO's administrative portal, as self-serve reporting was only available for years 2020 and forward. Therefore, the authors requested older data concerning the DDA plan directly from our EBSCO representative. Though COUNTER compliant usage data would be ideal in most cases, unfortunately, it does not provide the type of data points desired for the design of this study, such as cost, LCC call numbers, and transaction dates. Furthermore, merging COUNTER compliant usage data with cost, LCC, or transaction type data on a title-by-title level would be extremely difficult or impossible to complete with accuracy. Therefore, the requested data was not expected to be COUNTER compliant but rather contained all historical data and data points mapped to the titles in the DDA pool. The resulting data encompassed over thirty-five data points regarding each title and spanned back to the beginning of the plan in 2016. After receiving the data, the researchers performed data cleanup and began collating data for descriptive analysis. The data included eBooks of all statuses, such as firm ordered, DDA triggered, Not Yet Triggered, and Automatic Upgrade. In order to gain a clear picture of DDA title data only, the authors removed data related to eBooks that were firm-ordered. Further data cleanup involved removing leading and trailing characters, clarifying the difference between a blank cell and a cell with 0, understanding how cost was calculated, and converting categorical variable string data into numerical data for statistical purposes. After the data cleanup, the spreadsheet contained over 80,000 lines and seventy-six columns. The authors utilized Excel's PivotTable and PivotChart functions to create, filter, and build the data from the report for descriptive analysis. Equally, the authors utilized SPSS linear regression to explore the strength of relationships between key variables broken down by LCC which contained both continuous variables and the categorical variable *Primary Library of Congress Classification.* The results section includes four tables of metrics, each broken down by either Primary Library of Congress Classification (LCC) or subclass.

In order to place the findings of the data analysis in the context of the research parameters, some definitions of terms mentioned in the results and discussion sections should be established. University Libraries' DDA plan with EBSCO Information Services follows industry standards for DDA triggers, including session length, amount of time browsing, number of pages viewed, as well as downloaded, printed, e-mailed, or copied book sections. This threshold of use can vary depending on publisher negotiation or permitted use limits.

| **Term** | **Definition** |
| --- | --- |
| Triggered | An item where usage has reached a certain threshold to begin a short-term-loan or a purchase. |
| Not triggered | An item where usage has not reached a certain threshold or usage type to begin a short-term-loan or purchase |
| Purchase | An item that has reached a usage threshold triggering a full purchase with perpetual access |
| Short-term-loan (STL) | Some titles in the DDA pool allow for Short-Term-Loans of titles, billed at a percentage of the list price. Short-term-loans can be followed by a full purchased once a certain usage threshold is reached. The usage threshold triggering a STL varies, and subsequent purchase varies. Some publishers do not allow STLs, and therefore, not all eBooks in the DDA pool are eligible. |

| | |
|---|---|
| Total Accesses | All full-text access requests for an item, including a chapter download, full download, and online view. Does not include an abstract view. |
| Cost-per-use (CPU) | Total cost of an item divided by total accesses of an item |
| Automatic upgrade | Setting that permits automatic concurrent user limit upgrades on titles where available. An automatic upgrade is triggered upon reaching a usage threshold and is enabled to reduce turnaways. Not all titles in the DDA pool are eligible for automatic upgrade. |

Findings

Data collected from April 2016 to March 2023 shows there were 80,195 eBooks accessible in the DDA pool, of which 26,082 titles, or about 33%, had been triggered or purchased. Total accesses for all DDA eBook titles, triggered and not yet triggered, equaled 217,560, for an overall cost-per-use figure of $11.68. Expenditures for DDA triggered eBooks include costs incurred by a full purchase, by short-term-loans (STL) which is often charged at a percentage of the list price), and/or by automatic upgrades to higher concurrent user limits. The number of automatic upgrades that occurred over the life of the plan could not be accurately measured with the data provided. However, the number of STLs initiated throughout the plan was 8,715, and the average cost per title, taking all three types of charges into account, was $97.45.

Figure 1 shows a general visualization of the number of DDA eBooks purchased over time. Outliers from October 2018 to April 2019 were left in place for this figure and can be explained by events that occurred during that time. Specifically, a great deal of in-house customizations and modifications to EBSCO Discovery Service greatly increased the discoverability of DDA eBooks. These changes include more frequent record loading between the Voyager catalog and EBSCO Discovery Service (EDS), prioritizing Voyager catalog records for print and eBooks at the top of EDS results, implementing default search parameters to show only current holdings, and implementing the Full Text Finder link resolver. In May of 2019 the DDA plan was amended to address high demand and expenses, causing the drop seen in Figure 1 and then return to normal purchasing levels. Aside from outliers, purchasing rates have generally grown during fall and spring semesters while waning in the summer months when fewer classes are in session. The figure also demonstrates how purchasing has increased since the 2016 implementation, including consistent increases and decreases throughout the academic year, outliers notwithstanding.

**Figure 1.** Total DDA titles purchased by month, 2016 - 2022

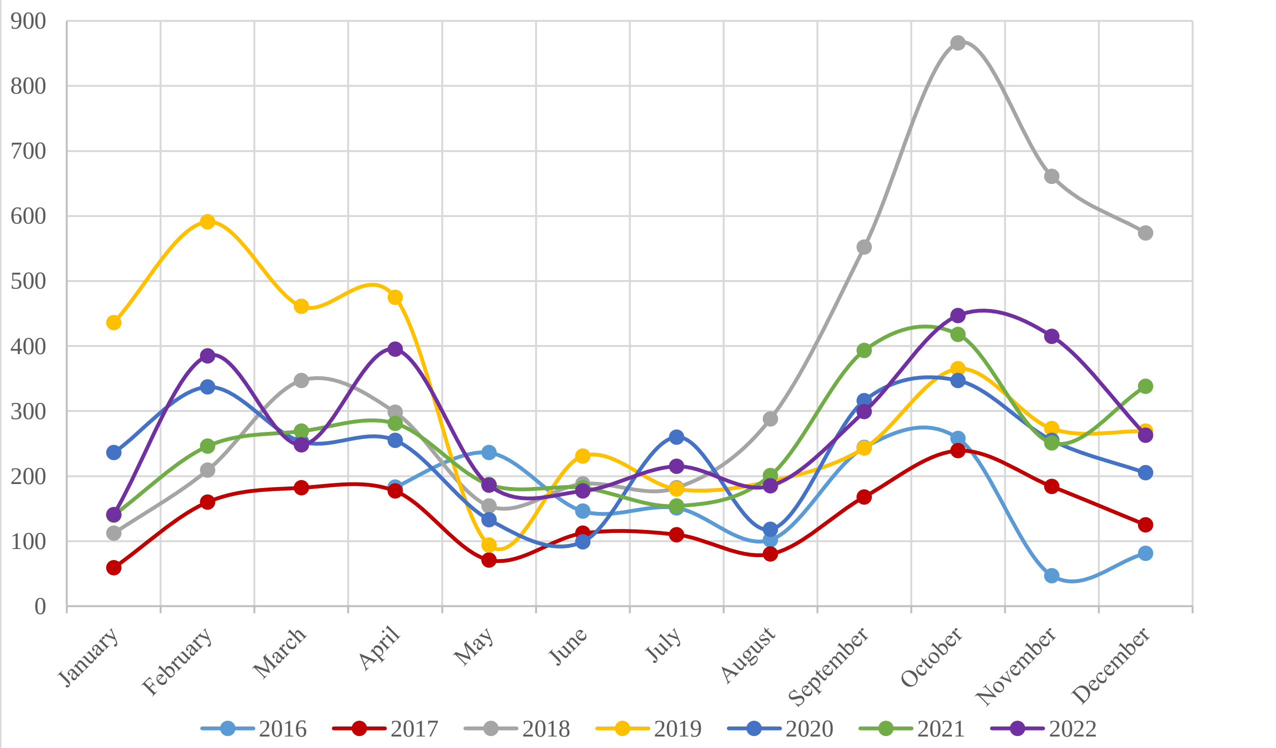


*Figure 1*

The data in Table 1 demonstrate the main performance measures of the DDA pool and include an analysis of titles in the pool by the primary Library of Congress Classification (LCC). All LCCs were represented in the data and, for clarity, the LCC row labeled "n/a" refers to those titles in the data that had no LCC supplied. The first section of the table analyzes the number of titles in the pool by LCC and the percentage of the total ($N$ = 80,195). Likewise, the subsequent sections of the table represent total accesses incurred, DDA triggers, and expenditures by primary LCC and the corresponding percentages of the totals. Broken down by all twenty-two LCC headings and one "n/a" heading, exploratory regression analysis reveals that strong correlations and statistical significance exist between *percent of titles in pool* and *percent of DDA triggers* [$r(3,19)=.938$, $p<.001$] and between *percent of total accesses* and *percent of DDA triggers* [$r(3, 19)=.929$, $p <.001$] in general. Further, when broken down by LCC, the dependent variable *percentage of DDA triggers* can be predicted by two independent variables *percentage of the DDA pool* [$\beta =.529$, $p <.001$] and *percentage of total accesses* [$\beta =.491$, $p <.001$] with most all variance accounted for by these two variables ($R^2$==.961, $p <.001$]. *Primary LC number* was not found to be a significant predictor variable. A histogram of standardized residuals in relation to frequencies shows that the residuals are normally distributed (see Figure 2), and specific LCCs showed greater strength in relation to the percentage of total accesses and the percentage of DDAs triggered through descriptive statistical analysis in the following section.

<Insert Table 1 here>

<Insert Figure 2 here>

**Table 1**. Performance Measures of the DDA pool by Primary LCC

| Primary LCC | DDA Pool | | Total Accesses | | DDA Triggers | | Expenditures** | |
|---|---|---|---|---|---|---|---|---|
| | *n =* | *% of N* | *n =* | *% of N* | *n =* | *% of N* | *$ =* | *% of total* |
| **A** | 167 | *0.21%* | 634 | *0.29%* | 76 | *0.29%* | $8,316.26 | *0.33%* |
| **B** | 11,804 | *14.72%* | 18,593 | *8.55%* | 2,723 | *10.44%* | $248,076.11 | *9.76%* |
| **C** | 524 | *0.65%* | 1,108 | *0.51%* | 150 | *0.58%* | $13,067.68 | *0.51%* |
| **D** | 7,305 | *9.11%* | 13,492 | *6.20%* | 2,162 | *8.29%* | $178,779.97 | *7.03%* |
| **E** | 2,466 | *3.08%* | 8,639 | *3.97%* | 930 | *3.57%* | $69,763.37 | *2.74%* |
| **F** | 1,942 | *2.42%* | 4,774 | *2.19%* | 593 | *2.27%* | $41,777.41 | *1.64%* |
| **G** | 3,138 | *3.91%* | 9,792 | *4.50%* | 1,229 | *4.71%* | $121,551.46 | *4.78%* |
| **H** | 11,568 | *14.42%* | 47,129 | *21.66%* | 4,383 | *16.80%* | $444,873.57 | *17.50%* |
| **J** | 2,610 | *3.25%* | 5,331 | *2.45%* | 774 | *2.97%* | $73,237.18 | *2.88%* |
| **K** | 352 | *0.44%* | 1,773 | *0.81%* | 146 | *0.56%* | $14,167.27 | *0.56%* |
| **L** | 3,181 | *3.97%* | 22,531 | *10.36%* | 1,921 | *7.37%* | $188,025.98 | *7.40%* |
| **M** | 1,765 | *2.20%* | 5,293 | *2.43%* | 664 | *2.55%* | $63,322.00 | *2.49%* |
| **N** | 2,355 | *2.94%* | 5,110 | *2.35%* | 767 | *2.94%* | $74,316.78 | *2.92%* |
| **P** | 14,721 | *18.36%* | 32,096 | *14.75%* | 4,251 | *16.30%* | $412,655.40 | *16.24%* |
| **Q** | 4,449 | *5.55%* | 10,650 | *4.90%* | 1,754 | *6.72%* | $188,710.56 | *7.42%* |
| **R** | 2,047 | *2.55%* | 11,772 | *5.41%* | 1,089 | *4.18%* | $104,685.82 | *4.12%* |
| **S** | 148 | *0.18%* | 405 | *0.19%* | 55 | *0.21%* | $6,982.27 | *0.27%* |
| **T** | 3,795 | *4.73%* | 9,362 | *4.30%* | 1,719 | *6.59%* | $235,539.08 | *9.27%* |
| **U** | 689 | *0.86%* | 1,467 | *0.67%* | 268 | *1.03%* | $20,637.08 | *0.81%* |
| **V** | 107 | *0.13%* | 103 | *0.05%* | 21 | *0.08%* | $1,466.61 | *0.06%* |
| **X** | 1 | *0.00%* | 1 | *0.00%* | 0 | *0.00%* | $0.00 | *0.00%* |
| **Z** | 689 | *0.86%* | 7,454 | *3.43%* | 402 | *1.54%* | $30,903.06 | *1.22%* |
| **n/a** | 4,372 | *5.45%* | 51 | *0.02%* | 5 | *0.02%* | $871.90 | *0.03%* |
| **Total** | ***N* = 80,195** | ***100%*** | ***N* = 217,560** | ***100%*** | ***N* = 26,082** | ***100%*** | ***$* = $2,541,726.82** | ***100%*** |

** Total expenditures includes purchases and short term loan costs

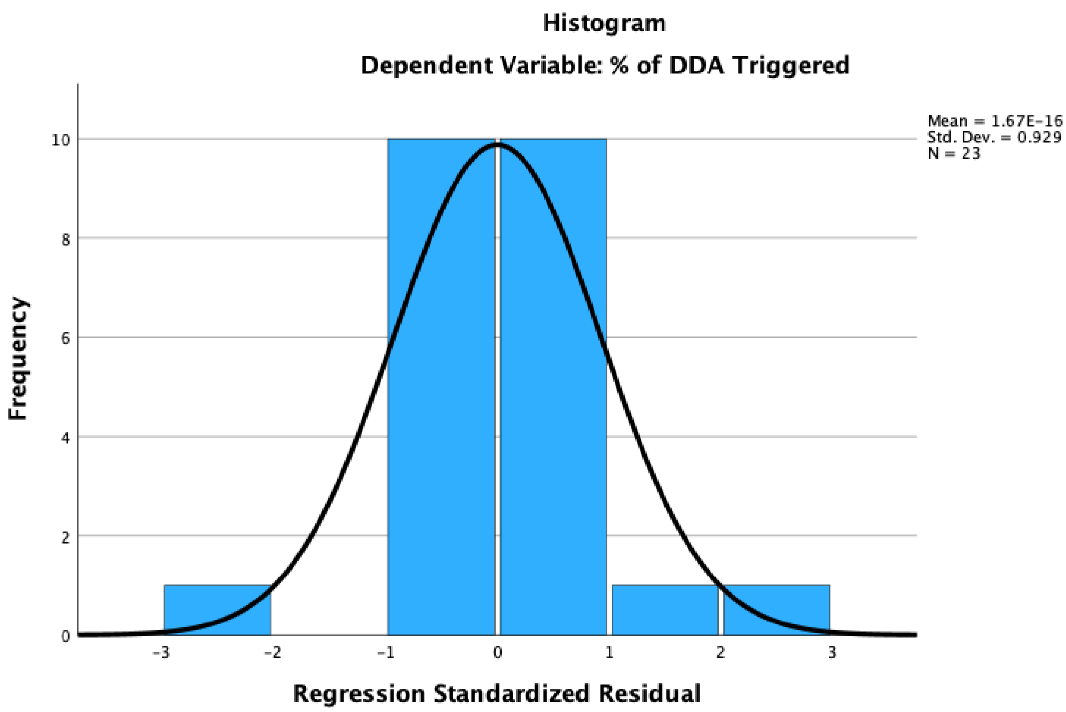


*Figure 2*

Table 2 shows the analysis of the top ten LCC subclasses by total accesses. A table including all LCC subclasses here would be unwieldy, as there are a great many subclasses represented in the data, so the authors included the top ten subclasses by total accesses. The highest rate of total accesses falls into the LCC subclass *LB*, Theory and Practice of Education. Other highly used areas include subclasses of *H*, *P*, and *B*, mirroring the findings of the primary LCC analysis. The presence of *E* in the top ten here can most likely be explained by the lack of subclasses in the *E* category, as well as with *Z* which has only two LCC subclasses, *Z* and *ZA*. The subclass of *P* indicated in this table refers to those titles within only that subclass, Philology and Linguistics, and excludes all other subclasses of *P* such as *PA*, *PS*, *PH* etc.

<Insert Table 2 here>

Table 2. Total Accesses by LCC Subclass

| LCC Subclass | **Total Accesses** |
|---|---|
| **LB** | 14,374 |
| **HV** | 12,456 |
| **HQ** | 10,544 |
| **PN** | 10,150 |
| **E** | 8,639 |
| **LC** | 7,056 |
| **Z** | 6,948 |
| **P** | 6,919 |
| **HM** | 6,591 |
| **BF** | 6,259 |

Table 3 highlights the calculated cost-per-use (CPU) figure by primary LCC, dividing total expenditures by total accesses, with the average CPU among the LCCs calculating to $12.09. The results show low CPU figures in *X*, *Z*, and *K* and substantially higher CPU in *T*, *Q*, *S*, as well as those titles without an assigned LCC. The higher CPU in these areas is not surprising, as *T*, *Q*, and *S* broadly represent technology, science, and agriculture titles, where monograph prices are typically high. This fact is corroborated in Table 4 which shows the cost-per-title rate, with the highest belonging to *T*, *S*, *A*, and *Q*.

<Insert Table 3 here>

**Table 3.** Cost per use by Primary LCC

| Primary LCC | Total Accesses | Total Expenditures | Cost Per Use |
|---|---|---|---|
| **A** | 634 | $8,316.26 | $13.12 |
| **B** | 18,593 | $248,076.11 | $13.34 |
| **C** | 1,108 | $13,067.68 | $11.79 |
| **D** | 13,492 | $178,779.97 | $13.25 |
| **E** | 8,639 | $69,763.37 | $8.08 |
| **F** | 4,774 | $41,777.41 | $8.75 |
| **G** | 9,792 | $121,551.46 | $12.41 |
| **H** | 47,129 | $444,873.57 | $9.44 |
| **J** | 5,331 | $73,237.18 | $13.74 |
| **K** | 1,773 | $14,167.27 | $7.99 |
| **L** | 22,531 | $188,025.98 | $8.35 |
| **M** | 5,293 | $63,322.00 | $11.96 |
| **N** | 5,110 | $74,316.78 | $14.54 |
| **P** | 32,096 | $412,655.40 | $12.86 |
| **Q** | 10,650 | $188,710.56 | $17.72 |
| **R** | 11,772 | $104,685.82 | $8.89 |
| **S** | 405 | $6,982.27 | $17.24 |
| **T** | 9,362 | $235,539.08 | $25.16 |
| **U** | 1,467 | $20,637.08 | $14.07 |
| **V** | 103 | $1,466.61 | $14.24 |
| **X** | 1 | $0.00 | $0.00 |
| **Z** | 7,454 | $30,903.06 | $4.15 |
| **n/a** | 51 | $871.90 | $17.10 |

<Insert Table 4 here>

**Table 4**. Average cost per title

| LC Class | **$ per title** |
|---|---|
| **A** | $109.42 |
| **B** | $91.10 |
| **C** | $87.12 |
| **D** | $82.69 |
| **E** | $75.01 |
| **F** | $70.45 |
| **G** | $98.90 |
| **H** | $101.50 |
| **J** | $94.62 |
| **K** | $97.04 |
| **L** | $97.88 |
| **M** | $95.36 |
| **N** | $96.89 |
| **P** | $97.07 |
| **Q** | $107.59 |
| **R** | $96.13 |
| **S** | $126.95 |
| **T** | $137.02 |
| **U** | $77.00 |
| **V** | $69.84 |
| **Z** | $76.87 |
| **n/a** | $174.38 |
| **Average** | **$97.45** |

Discussion

A number of telling statistics emerge from the analysis that point toward the benefits of the DDA-centered collection strategy. First, the LCCs represented by the two areas most prevalent in the DDA pool, Social Sciences (*H)* and Language and Literature (*P*), are aligned to many of the foci of The University of Alabama areas of study and represent broad classification areas in the LCC system along with representing traditionally monograph-heavy disciplines. When the data are broken down further into LCC subclassifications, many of the subclasses of *H* and *P* continue to appear, pointing to more narrow subject areas that are highly represented by curricular needs of The University of Alabama's student body such as *LB* (Theory and Practice of Education), *HV* (Social Pathology, Social and Public Welfare, Criminology), and *HQ* (The Family, Marriage, Women). What's more, the results here mimic the findings of Carrico et al. (2015) and Gilbertson et al. (2014), demonstrating that humanities and social sciences disciplines were highly purchased and highly utilized within a DDA or PDA model.

To further contextualize these findings, as of Fall 2022, there were just over 2,000 enrolled students with a declared major or minor in Criminology, Criminal Justice, and/or Cyber Criminology (subjects represented in *HV*). [Instution] also has a large School of Social Work, as well as the College of Human and Environmental Sciences with about 5,000 students enrolled between them. Likewise, the College of Education had over 3,000 enrolled students with a declared major or minor in the various areas of concentration such as Educational Psychology or Elementary Education (subjects represented in *L* and *LB*). The subject areas represented in *HQ* might be of interest to those studying psychology or sociology, which enroll more than 3,000 students, apart from the School of Social Work or Human and Environmental Sciences (Office of Institutional Research and Assessment, 2023). While compartmentalizing these LCCs as pertaining only to these large areas of study on campus ignores the interdisciplinary nature of the associated titles, looking at the usage of titles in these subject areas in context with enrollment numbers paints a broad picture of how the DDA pool is being populated and utilized relative to the needs of the student body. The wealth of eBooks in the pool under these LCCs, coupled with the associated high rates of triggers and usage, broadly suggests the effectiveness of the approval plan parameters in populating the DDA pool according to curricular needs.

The findings represented in Table 1 generate more evidence of adequate support for varying disciplines. When creating this table, the authors expected to see balance across all metrics represented, resembling what Mills (1982) indicated as the "percent of expected use" (PEU) metric and what Walker and Arthur (2018) coined the "purchase-use equilibrium" defined as the alignment between purchases and rates of use for electronic monographs as an indicator of effective collection development practices, resulting in a balanced collection that well suits the research needs of the user population (p. 657). While the present study does not intend to reproduce the results of Walker and Arthur's (2018) study, the same principles of establishing value, efficacy, and return on investment through the "utility as value" paradigm, still apply. Therefore, a general equivalency across all four metrics in Table 1 would point toward the effectiveness of the approval plan profile parameters in creating a DDA pool that adequately meets the needs of campus users.

The results of the analysis indicate that a good example of balance across all metrics with a very low differential is represented by the *M* classification in Table 1. Titles in this area represent about 2.5% across each of the totals with very minor variations. Conversely, one area with a large differential among the data points pertains to titles represented by *L* (Education). This LCC represents 3.97% of titles in the DDA pool but 10.36% of the total accesses for a difference of six points. Using Mill's (1982) "percent of expected use" calculation, the *L* classification here is responsible for 261% more use than expected, based on the percentage it represents in the DDA pool. The imbalance across metrics is further seen in the almost three-point difference between the expenditures and the total accesses. Coupled with the data in Table 3, which shows a CPU of $8.35, the authors can infer from these metrics that titles in this area are yielding a very good return on investment. The inequity within this LCC points toward the potential long-term utility of these titles as compared to some other areas, as usage rates continue to grow on titles in which funds and triggers have already been expended. This result also suggests that the approval profile could be examined and the pool expanded in this subject area in order to provide access to more eBooks in this discipline. Anecdotally, the authors had previously been met with criticism from faculty librarians of purchasing eBooks in the field of education, as it was viewed as dependent on print titles, however the data shown here indicate a great reliance upon and comfort with eBooks for that subject.

A similar differential exists within the *H* classification, where 14.42% of the pool is represented compared to accesses representing 21.66% of the total, a 7.24% differential for a PEU of 150%. The results in this LCC are not surprising, as the *H* classification represents the social sciences which are areas of heavy focus on The University of Alabama campus. This result indicates another area of high demand and may warrant further examination and consideration of approval plan profile parameters or strategies to increase electronic monograph acquisitions outside of the DDA pool for in order to provide increased support in the collection for social sciences.

Interestingly, there are a couple of LCCs represented in Table 1 which show imbalances in areas that may point towards a need for further inspection. The LCC of *B* (Philosophy, Psychology, Religion) shows an interesting change in differential from other classifications. The percentage of the DDA pool represented by *B* is 14.72%, however, the percentage of total uses comprises only 8.55% for a differential of about six points or a PEU of 58%. A similar issue exists with *D* (World History and History of Europe, Asia, Africa, Australia, New Zealand, etc.) where the percentage of total accesses represents the lowest metric as compared to the percentage of the pool, triggers, and expenditures. Even so, these two areas of discrepancy do not immediately point toward problems with the collection strategy or approval profile. Instead, the results here could be interpreted as of lesser consequence, since in both cases the percentage of use and expenditure is still closely aligned. The larger amount of titles in the pool represented by these two LCCs is, subsequently, a lesser concern, as there is no added cost or expense incurred for unused or untriggered titles, one of the main benefits of a DDA plan.

Another area that the authors have considered is how the results of this analysis compare to that of the findings in the 2018 study. While this study is not intended to reproduce the method or results of the 2018 study, some comparisons may still be drawn. Specifically, Walker and Arthur's (2018) research indicated that, sixteen months into implementation, higher use was associated with titles in the *P* and *H* classifications, just as with the present study. When considering the "purchase/use differential" (PUD), defined as the measured difference between rate of purchase and rate of use (Walker & Arthur, 2018), the present study indicated an increase in the differential in the *L* classification as growing from 1.8% after sixteen months of implementation to 2.96% after eighty-four months of implementation. Interestingly, a much higher PUD appeared for the *H* classification in the present study as well, growing from a negligible 0.1% to 4.16% since the 2018 study. The authors can infer that the higher purchase/use differentials seen in the present study reflect both increased levels of use on already-purchased titles and an increased comfort level with the eBook format over time.

Moreover, the DDA pool has continued to grow, since University Libraries does not deselect or "weed" the DDA pool. Additionally, purchase rates, use, and triggers have continued to grow along with the pool. The 2018 study indicated 2,087 titles had been purchased on the DDA plan after sixteen months of implementation. By March of 2023, or eighty-four months after implementation, 21,553 eBooks had been purchased on the DDA plan, an increase of 19,466 titles. The pace of purchasing also grew from approximately 130 eBooks purchased per month to approximately 256 eBooks purchased per month by the time of this study. Likewise, 1,525 accesses per month as measured in 2018 grew to 2,590 total accesses per month by March of 2023. Based on these figures, since 2018, our purchasing and use rate on the DDA program has grown by about 70% from when it was first implemented.

Future Directions and Conclusion

Returning to the original goal of this data analysis, evidence highlighted here exists to strongly support the long-term sustainability and success of the DDA-centered collection strategy at The University of Alabama Libraries. First, the overall cost-per-use of eBooks triggered via the DDA plan is well within an acceptable range and clearly demonstrates a high return on investment, especially as it concerns titles in Education and Social Sciences. The "hands-off" approach to collection development that is afforded to University Libraries through this strategy has allowed for repositioning staff time and labor within acquisitions and collection development as well. The time saved has been re-directed toward other key initiatives such as allowing subject liaisons to spend less time on monographic collection development and more time on outreach and instruction.

Further, when broken down by all twenty-two LCC headings and one n/a heading, regression analysis revealed that strong correlations and statistical significance existed between the percent of titles in the DDA pool and the percent of DDA triggers [$r(3,19)=.938$, $p<.001$] and between percent of total accesses and percent of DDA triggers [$r(3, 19)=.929$, $p <.001$] in general. Further, when broken down by LCC, the dependent variable percentage of DDA triggers can be predicted by two independent variables: percentage of the DDA pool [$\beta =.529$, $p <.001$] and percentage of total accesses [$\beta =.491$, $p <.001$] with most all variance accounted for by these two variables (R2==.961, $p <.001$]. Notably, primary LC classification was not found to be a significant predictor variable. The statistically significant relationships found in this analysis support the idea that this strategy has resulted in a monographic collection that is well aligned to the needs of students and faculty across the campus. If no statistically significant relationship between the variables had been found, the authors might generate a new hypothesis that the plan was not performing in the way in which it was designed. For instance, if no relationship existed between the percentage of the pool represented by any particular LCC and the percentage of triggers of that same LCC, then the authors might generate a new hypothesis that the strategy needs further consideration and better alignment to the needs of users.

Maintaining regular assessments of the DDA plan has allowed for continued alignment to curricular needs while continuing to emphasize fiscal responsibility. Because the DDA plan is so integral to the collection strategy, funding has continued to be available through annual allocations from state funding supplemented as needed from gifts and endowments. In areas where the DDA plan could be strengthened, University Libraries has already implemented strategies for meeting collection needs, such as eBook package purchases, approval plans, and strategic database selections to supplement collection needs.

The University of Alabama Libraries will continue to make use of the DDA model, the advantages of which have been well substantiated through the findings of this study. As previously mentioned, the authors see additional benefits in using DDA data to evaluate purchasing methods to supplement the model as needed, including potentially implementing DDA at larger scales on other platforms and through evidence-based acquisitions programs, discipline-specific publisher packages, increased firm orders.

The authors encourage collection managers and acquisitions professionals at other research institutions to thoroughly review the advantages of a comprehensive DDA-centered collection strategy in order to meet local user needs. When coupled with thorough and consistent assessment practices, the authors believe that a DDA centered strategy provides a highly effective and efficient way to acquire monographs based upon demonstrated need. While some institutions may have hesitated to implement large-scale DDA programs for fear of overspending, the authors assert that no matter the budget size of the institution, basing a DDA plan on an existing approval profile, coupled with frequent assessment of cost and usage data, can be a recipe for success.

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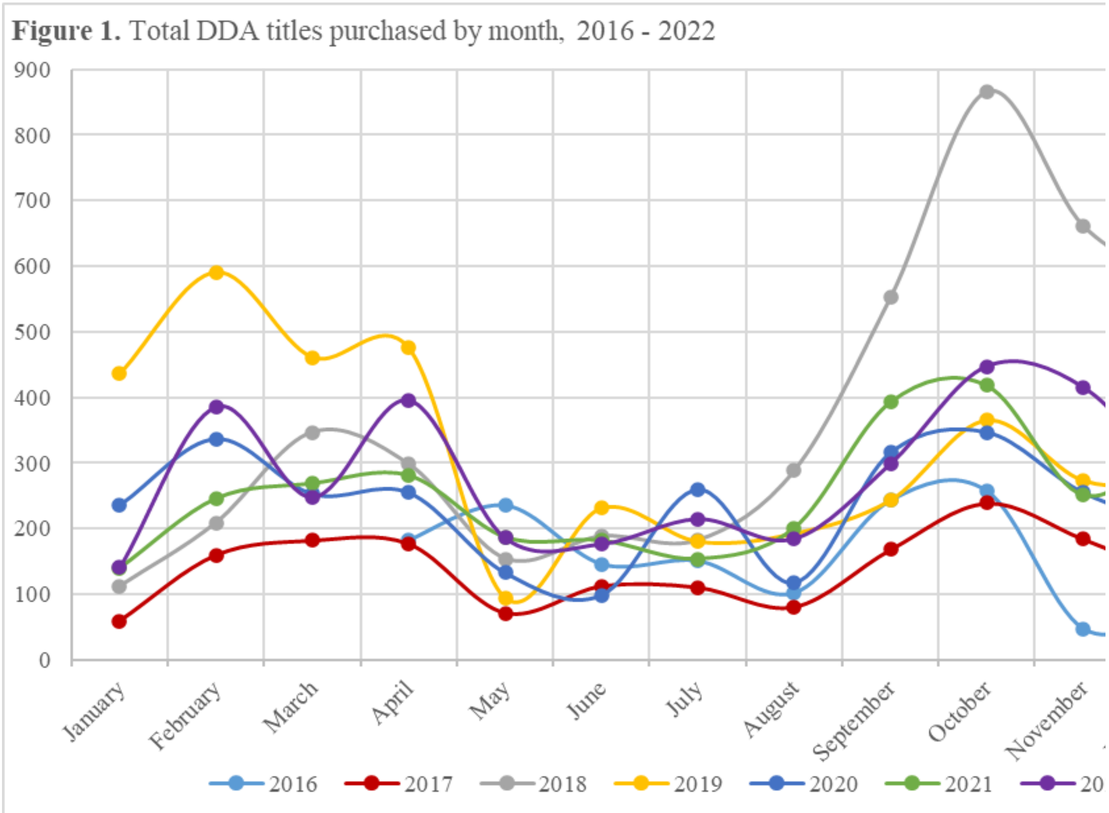
Figure 1. Total DDA titles purchased by month, 2016 - 2022
900
800
700
600
500
400
300
200
100
0
January
February
March
April
May
June
July
August
September
October
November
2016
2017
2018
2019
2020
2021
20

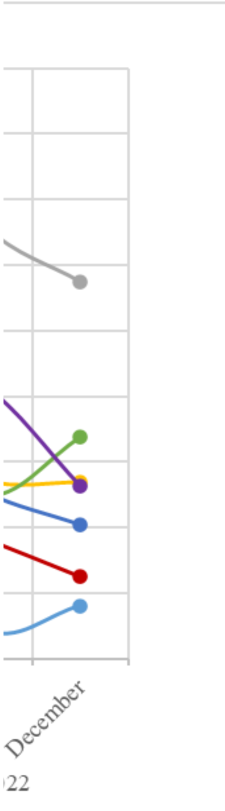
December
22

Figure 2 Click here to access/download;Figure;Figure 2.xlsx

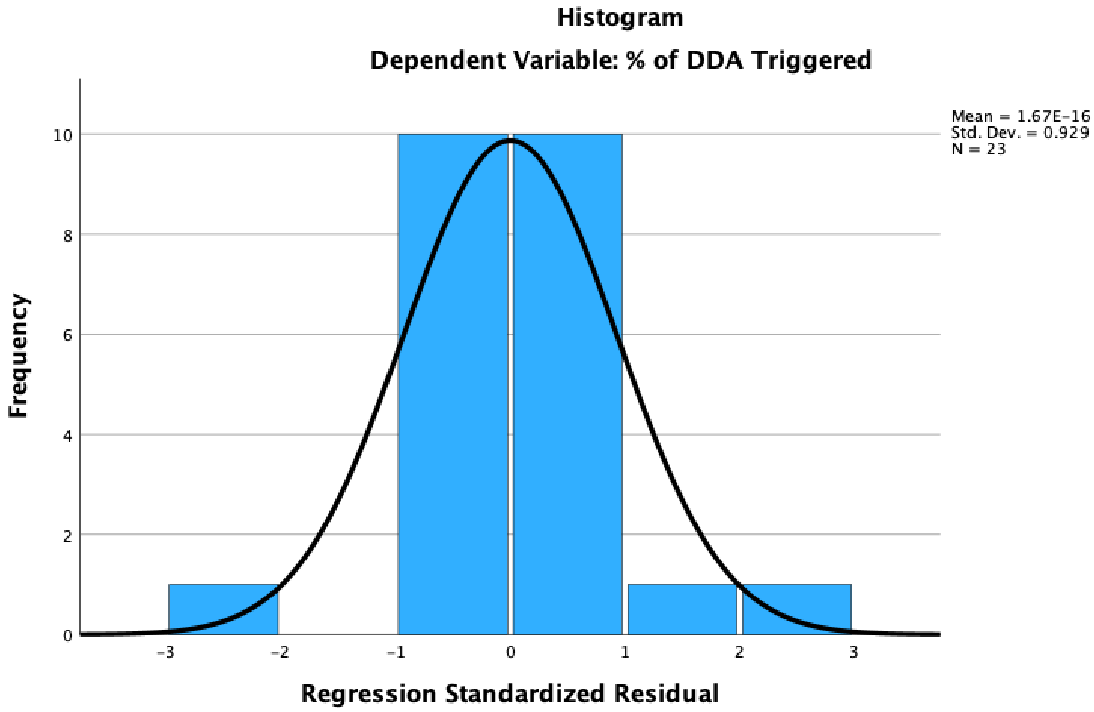

**Table 1**. Performance Measures of the DDA pool by Primary LCC

| **Primary LCC** | **DDA Pool** | | **Total Accesses** | |
|---|---|---|---|---|
| | *n* = | *% of N* | *n* = | *% of N* |
| **A** | 167 | *0.21%* | 634 | *0.29%* |
| **B** | 11,804 | *14.72%* | 18,593 | *8.55%* |
| **C** | 524 | *0.65%* | 1,108 | *0.51%* |
| **D** | 7,305 | *9.11%* | 13,492 | *6.20%* |
| **E** | 2,466 | *3.08%* | 8,639 | *3.97%* |
| **F** | 1,942 | *2.42%* | 4,774 | *2.19%* |
| **G** | 3,138 | *3.91%* | 9,792 | *4.50%* |
| **H** | 11,568 | *14.42%* | 47,129 | *21.66%* |
| **J** | 2,610 | *3.25%* | 5,331 | *2.45%* |
| **K** | 352 | *0.44%* | 1,773 | *0.81%* |
| **L** | 3,181 | *3.97%* | 22,531 | *10.36%* |
| **M** | 1,765 | *2.20%* | 5,293 | *2.43%* |
| **N** | 2,355 | *2.94%* | 5,110 | *2.35%* |
| **P** | 14,721 | *18.36%* | 32,096 | *14.75%* |
| **Q** | 4,449 | *5.55%* | 10,650 | *4.90%* |
| **R** | 2,047 | *2.55%* | 11,772 | *5.41%* |
| **S** | 148 | *0.18%* | 405 | *0.19%* |
| **T** | 3,795 | *4.73%* | 9,362 | *4.30%* |
| **U** | 689 | *0.86%* | 1,467 | *0.67%* |
| **V** | 107 | *0.13%* | 103 | *0.05%* |
| **X** | 1 | *0.00%* | 1 | *0.00%* |
| **Z** | 689 | *0.86%* | 7,454 | *3.43%* |
| **n/a** | 4,372 | *5.45%* | 51 | *0.02%* |
| **Total** | ***N* = 80,195** | ***100%*** | ***N* = 217,560** | ***100%*** |

** Total expenditures includes purchases and short term loan costs

| DDA Triggers | | Expenditures** | |
|---|---|---|---|
| *n* = | *% of N* | *$* = | *% of total* |
| 76 | *0.29%* | $8,316.26 | *0.33%* |
| 2,723 | *10.44%* | $248,076.11 | *9.76%* |
| 150 | *0.58%* | $13,067.68 | *0.51%* |
| 2,162 | *8.29%* | $178,779.97 | *7.03%* |
| 930 | *3.57%* | $69,763.37 | *2.74%* |
| 593 | *2.27%* | $41,777.41 | *1.64%* |
| 1,229 | *4.71%* | $121,551.46 | *4.78%* |
| 4,383 | *16.80%* | $444,873.57 | *17.50%* |
| 774 | *2.97%* | $73,237.18 | *2.88%* |
| 146 | *0.56%* | $14,167.27 | *0.56%* |
| 1,921 | *7.37%* | $188,025.98 | *7.40%* |
| 664 | *2.55%* | $63,322.00 | *2.49%* |
| 767 | *2.94%* | $74,316.78 | *2.92%* |
| 4,251 | *16.30%* | $412,655.40 | *16.24%* |
| 1,754 | *6.72%* | $188,710.56 | *7.42%* |
| 1,089 | *4.18%* | $104,685.82 | *4.12%* |
| 55 | *0.21%* | $6,982.27 | *0.27%* |
| 1,719 | *6.59%* | $235,539.08 | *9.27%* |
| 268 | *1.03%* | $20,637.08 | *0.81%* |
| 21 | *0.08%* | $1,466.61 | *0.06%* |
| 0 | *0.00%* | $0.00 | *0.00%* |
| 402 | *1.54%* | $30,903.06 | *1.22%* |
| 5 | *0.02%* | $871.90 | *0.03%* |
| ***N* = 26,082** | ***100%*** | **$ = $2,541,726.8** | ***100%*** |

Table 2. Total Accesses by LCC Subclass

| LCC Subclass | **Total Accesses** |
|---|---|
| **LB** | 14,374 |
| **HV** | 12,456 |
| **HQ** | 10,544 |
| **PN** | 10,150 |
| **E** | 8,639 |
| **LC** | 7,056 |
| **Z** | 6,948 |
| **P** | 6,919 |
| **HM** | 6,591 |
| **BF** | 6,259 |

**Table 3.** Cost per use by Primary LCC

| Primary LCC | **otal Access** | **Total Expenditures** | **ost Per Use** |
|---|---|---|---|
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| **G** | 9,792 | $121,551.46 | $12.41 |
| **H** | 47,129 | $444,873.57 | $9.44 |
| **J** | 5,331 | $73,237.18 | $13.74 |
| **K** | 1,773 | $14,167.27 | $7.99 |
| **L** | 22,531 | $188,025.98 | $8.35 |
| **M** | 5,293 | $63,322.00 | $11.96 |
| **N** | 5,110 | $74,316.78 | $14.54 |
| **P** | 32,096 | $412,655.40 | $12.86 |
| **Q** | 10,650 | $188,710.56 | $17.72 |
| **R** | 11,772 | $104,685.82 | $8.89 |
| **S** | 405 | $6,982.27 | $17.24 |
| **T** | 9,362 | $235,539.08 | $25.16 |
| **U** | 1,467 | $20,637.08 | $14.07 |
| **V** | 103 | $1,466.61 | $14.24 |
| **X** | 1 | $0.00 | $0.00 |
| **Z** | 7,454 | $30,903.06 | $4.15 |
| **n/a** | 51 | $871.90 | $17.10 |

**Table 4**. Average cost per title (includes cost for STL, purchase, and automatic upgrades)

| LC Class | **$ per title** |
|---|---|
| **A** | $109.42 |
| **B** | $91.10 |
| **C** | $87.12 |
| **D** | $82.69 |
| **E** | $75.01 |
| **F** | $70.45 |
| **G** | $98.90 |
| **H** | $101.50 |
| **J** | $94.62 |
| **K** | $97.04 |
| **L** | $97.88 |
| **M** | $95.36 |
| **N** | $96.89 |
| **P** | $97.07 |
| **Q** | $107.59 |
| **R** | $96.13 |
| **S** | $126.95 |
| **T** | $137.02 |
| **U** | $77.00 |
| **V** | $69.84 |
| **Z** | $76.87 |
| **n/a** | $174.38 |
| **Average** | **$97.45** |

**Declaration of Interest Statement**

Title: "A Retrospective Look at a DDA-Centered Collection Strategy: Planning for the Future of Monograph Acquisitions"

Submitted September 22nd, 2023

To whom it may concern:

We wish to confirm that there are no known conflicts of interest associated with this publication and there has been no significant financial support for this work that could have influenced its outcome.

Sincerely,

Lindsey Lowry (Corresponding Author)

Michael A. Arthur

Donald L. Gilstrap

The University of Alabama Libraries
Box 870266
Tuscaloosa, AL 35404

November 16, 2023

Dr. Folk,

Enclosed is the revised manuscript of an original research article titled "A Retrospective Look at a DDA-Centered Collection Strategy: Planning for the Future of Monograph Acquisitions." The authors have reviewed the refereed feedback and wish to submit this revised manuscript for consideration to *The Journal of Academic Librarianship*.

Correspondence concerning this article should be addressed to Lindsey Lowry, University Libraries, Box 870266, Tuscaloosa, AL, 35487. E-mail address lrlowry@ua.edu.

Thank you for your consideration.

Sincerely,

Lindsey Lowry
Coordinator of Acquisitions and Electronic Resources
Assistant Professor
(Conceptualization, Methodology, Formal Analysis, Investigation, Data Curation, Writing – Original Draft, Writing – Review & Editing, Revisions, Visualization, Supervision)

Michael Arthur
Senior Associate Dean
Professor
(Conceptualization, Methodology, Writing – Original Draft, Writing, Review & Editing, Revisions)

Donald L. Gilstrap, PhD.
Dean, University Libraries
Professor
(Methodology, Formal Analysis, Data Curation, Writing – Review & Editing, Revisions, Visualization)