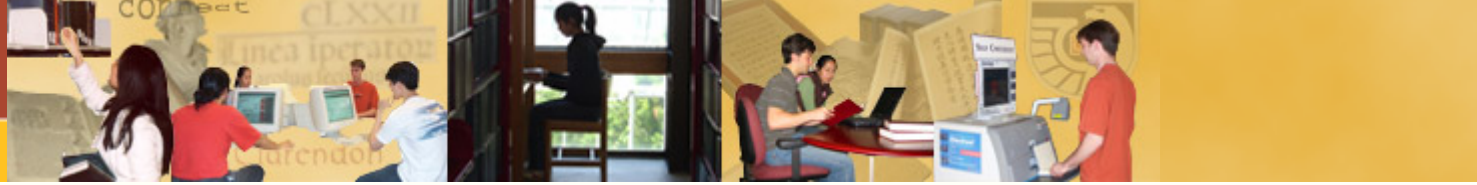


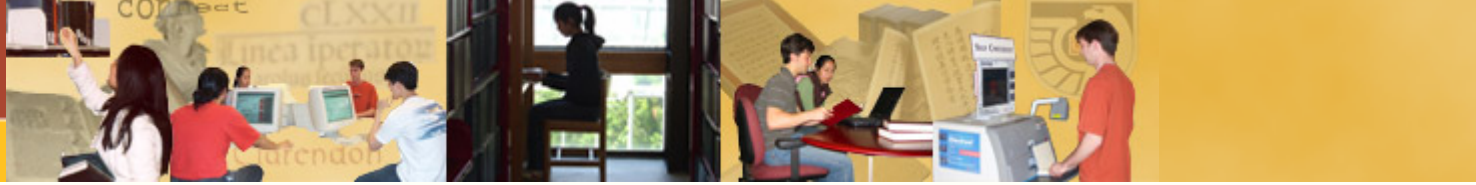
# A Collaborative, Criteria-Based Approach for Electronic Resource Purchase and Renewals

Abigail Bordeaux and Alesia McManus  
Electronic Resources & Libraries 2007



# Overview

- Electronic Resources Review (ERR) process developed at University of Maryland (UM) Libraries
- Process adapted for use at Binghamton University (BU) Libraries
- BU Libraries adapted the ERR process to rank potential purchases (wish list)
- We evaluated and revised both the ERR and wish list processes



# UM Libraries Review

- Needed to identify 25% of subscriptions for possible cancellation
- Used a criteria-based decision grid (see Ingrid Bens *Facilitation at a Glance!*) to achieve consensus



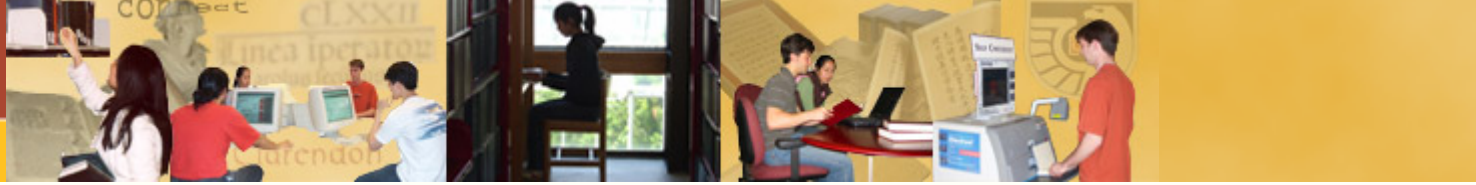
# BU Libraries Electronic Resources Review

- The purpose is to implement an annual process to determine whether or not we should continue an electronic resources subscription
- E-resources included reference materials, bibliographic databases and aggregators
- Pertained to items funded by the electronic resources budget



# Criteria based decision grid

Access	Cost Effectiveness	Breadth/Audience	Uniqueness
<ul style="list-style-type: none"> <li>•Technical reliability</li> <li>•Open URL compliant</li> <li>•Z39.50/XML access for metasearching</li> <li>•Ease of use</li> <li>•Accessible remotely</li> <li>•Format considerations e.g. CD-ROM</li> <li>•Limitations on # of users</li> </ul>	<ul style="list-style-type: none"> <li>•Cost per search</li> <li>•Rapid inflator (price increase is 25% or higher)</li> </ul>	<ul style="list-style-type: none"> <li>•Impact on research and/or curriculum needs</li> <li>•Number of users affected</li> <li>•Primary users groups</li> <li>•Number of searches per year</li> <li>•Number of turn-aways</li> </ul>	<ul style="list-style-type: none"> <li>•Material covered</li> <li>•Overlap with other sources</li> <li>•Unique resource for curriculum and/or teaching</li> </ul>



# Role of subject librarians

- Subject librarians provided information about each resource using a web-based form designed to provide information for each criterion
- The Reference Collection Team provided forms for the general, multidisciplinary sources
- More than one form was submitted for several resources

## Electronic Resources Review Bibliographer's Input Form

Please fill out a form for each resource (e.g., database, e-journal package) in your subject areas. The purpose of the form is to provide information on how well each resource meets the criteria outlined in the Electronic Resources Review process. If you need additional room to provide the requested information, please feel free to attach additional pages.

Most fields are required.

Bibliographer's Name:  E-mail Address:

Resource Name:  Platform:

Date:

### Access

#### 1a. What is the format?

CD-ROM  
Web-based  
Client-based  
Other

If other, please explain:

#### 1b. Please describe any service or support requirements:



## Cost Effectiveness

1. Please calculate the cost per search for the most recent annual subscription price and the past twelve months of data, if available. Take the annual subscription price and divide by the total number of searches.

For example: Biological Abstracts 18,660/10,986 searches = \$1.70.

See [usage statistics](#) & [prices](#).

2. Has the price increased more than 25% from last year? ☐ Yes ☐ No

## Breadth/Audience

1. Describe *how* this resource supports research and/or curriculum needs:

2. Which departments and/or programs are supported by this resource? Please list.

3. What is the total faculty, staff and student FTE for these departments/programs? See <http://oir.binghamton.edu> for FTE information

4. Who are the *primary* user group(s)? (e.g. faculty, graduate students, undergraduates)





# Scoring

- Electronic Resources Committee evaluated each resource by assigning a value of 1, 2, or 3 for each criterion
  - 1 = does not meet criteria well
  - 2 = somewhat meets the criteria
  - 3 = good at meeting the criteria
- Four numbers totaled to give each resource a score



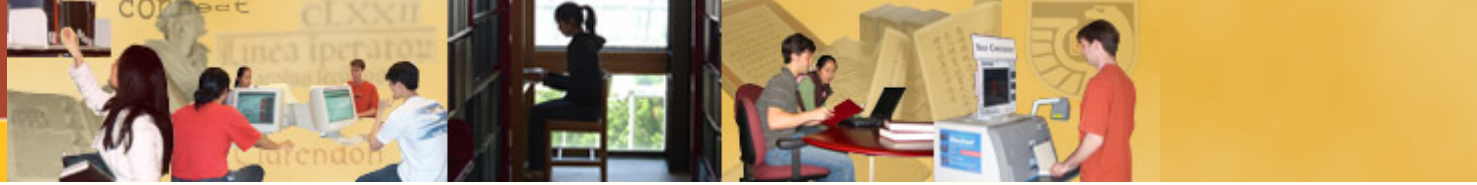
# Results

Resources	MLA	JSTOR Arts & Sciences I,II,III	Nature Online	Anthropological Literature
Access	3	3	3	3
Cost Effectiveness	3	3	2.5	2.5
Breadth/Audience	3	3	2.5	2.5
Uniqueness	3	2	2.5	2.5
Score	12	11	10.5	10



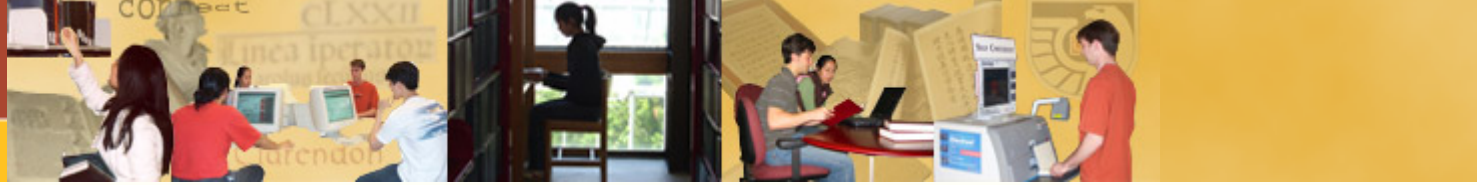
# How well did it work?

- We were able to quickly make renewal decisions
- We identified substitutions for current subscriptions that provided enhanced content or an improved interface
- Migrated to Ebsco and CSA platforms when possible for cost savings and consistent search experience for patrons
- Could evaluate our holdings against consortial purchases by SUNY



# Wish List Process

- For expediency used the same form as E-Resource Review
- Accepted various types of e-resources
- Reviewed only Breadth/Audience and Uniqueness



# Wish List Process cont.

- Used same scoring system as ERR
- Looked at subject representation and factors such as pricing model to make decisions among resources with same score



# Wish List Results

Resources	Times (London) Digital Archives	Wiley Encyclopedia of Biomedical Engineering	Affilia Journal of Women and Social Work	Cochrane Library
Breadth/ Audience	3	2	1.5	1.5
Uniqueness	2	3	3	3
Score	5	5	4.5	4.5



# Wish List Results

- Received \$100,000 for one-time purchases and subscriptions
- Purchased databases/ref works scored 5 & 4.5, reviewed 4s for subject representation, price model, access, etc.
- Used approximately \$7,000 for e-journal subscriptions





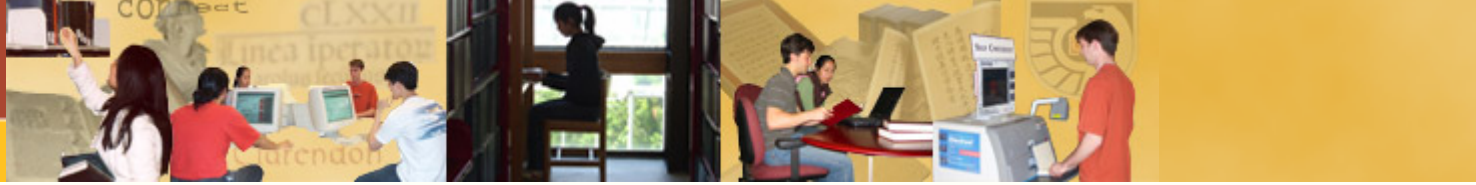
# Revised ERR Grid

Access	Cost Effectiveness	Breadth/Audience	Uniqueness
<ul style="list-style-type: none"> <li>•Technical reliability</li> <li>•Open URL compliant</li> <li>•Z39.50/XML access for metasearching</li> <li>•Ease of use</li> <li>•Accessible remotely</li> <li>•Format considerations e.g. CD-ROM</li> <li>•Limitations on # of users</li> </ul>	<ul style="list-style-type: none"> <li>•Cost per search</li> <li>•Rapid inflator (price increase is 25% or higher)</li> <li>•<b>Absolute dollar increase</b></li> </ul>	<ul style="list-style-type: none"> <li>•Impact on research and/or curriculum needs</li> <li>•Number of users affected</li> <li>•Primary user groups</li> <li>•Number of searches per year</li> <li>•Number of turn-aways</li> </ul>	<ul style="list-style-type: none"> <li>•Material covered</li> <li>•Overlap with other sources</li> <li>•Unique resource for <b>research and/or curriculum needs</b></li> </ul>



# New Wish List Grid

Access	Breadth/Audience	Uniqueness
<ul style="list-style-type: none"> <li>•Technical reliability</li> <li>•Open URL compliant</li> <li>•Z39.50/XML access for metasearching</li> <li>•Ease of use</li> <li>•Accessible remotely</li> <li>•Format considerations e.g. CD-ROM</li> <li>•Limitations on # of users</li> </ul>	<ul style="list-style-type: none"> <li>•Impact on research and/or curriculum needs</li> <li>•Number of potential users</li> <li>•Primary user groups</li> </ul>	<ul style="list-style-type: none"> <li>•Material covered</li> <li>•Overlap with other sources</li> <li>•Unique resource for research and/or curriculum needs</li> </ul>



# Changes to the Forms

- Added space for consortia, access model, accreditation
- Deleted or rephrased questions such as “is it reliable?”

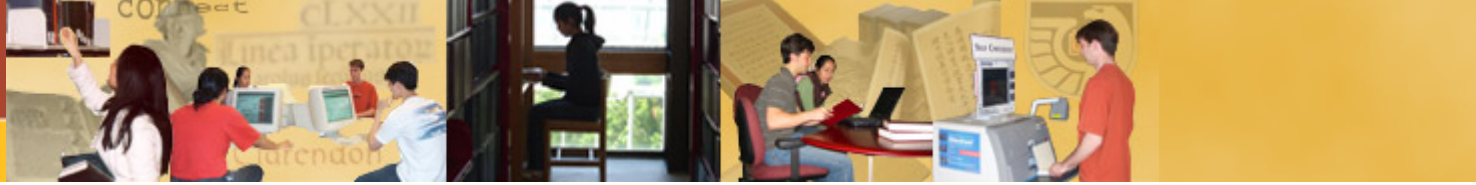


## ERR

- Changed usage data questions to make it easier to calculate correctly
- Asked for \$ price increase

## Wish List

- Added fields for more general info
- Asked for ILL data on journals
- Asked for existing \$ commitments that could be used



# What We Learned

- Communicate thoroughly and frequently with subject librarians
- Document scoring and decision making to ensure consistency & transparency
- Ensure reusability of data from both processes
- Gather lots of data up front



# Citations

- Using a Decision-Grid Process to Build Consensus in Electronic Resource Cancellation Decisions by Gerri Foudy & Alesia McManus, *Journal of Academic Librarianship*, November 2005. (Available via ScienceDirect)
- Ingrid Bens, *Facilitation at a Glance!: A Pocket Guide of Tools and Techniques for Effective Meeting Facilitation* (Methuen, MA: Goal/QPC, 1999), pp. 145-148.