Increasing Objectivity in eResource Selection

Megan Anderson, BA, MLIS & Linda Crosby, BA, MLS
Research & Curriculum Librarians

Background

Librarians at Fanshawe College were faced with a major dilemma. A significant eResource budget cut, combined with a sinking Canadian dollar, made it impossible to keep all the databases in the collection. The ensuing decision making process left us repeatedly fighting our instincts. The process was long and challenging, in part because each Librarian had her own emotional investment in particular databases. As Walters explains in his 2016 article, we also had to be cognizant of the ability to explain our decisions to non-Librarians: “Regardless of the library’s staffing or selection model, collection development librarians must be able to explain their decisions to librarians, faculty, and administrators with primary interests in areas other than collection development.”

We believed there must be a way to objectively assess which databases should be retained or added to the collection. We were also curious to see if our instincts aligned with an objective, rational review of the data. We have had success using a priority matrix format for projects. This format successfully eliminated the promotion of ‘pet’ projects, so we decided to see if it would work the same way for databases.

Discussion

We have used the Priority Matrix since November 01 2016 as renewals have come in. This utilization has identified required minor tweaks, three of which are of note.

While we included ‘Cost per Expected User’ in our initial list of criteria, we neglected to include ‘Actual Cost Per Use’. ‘Actual Cost per Use’ is, of course, of equal importance so it was added to the list of criteria and assigned a weight of 8.

As we continued to work with the database we also quite quickly realized that we were going to need two Priority Matrices – one for renewal and retention of databases, and one for new subscriptions. This differentiation is necessary since a criteria such as ‘Actual Cost per Use’ is not available and should not be applied to a potential new resource.

Additionally, some wording of criteria descriptions was necessary to make their scope wider and more encompassing or applicable when evaluating non-traditional eResources like SimplyMap and Envision.

Going forward, we will have an annual eResource Collection meeting during which all existing subscriptions, as well as desired additions, will be evaluated using the Priority Matrix so a decision can be made. These decisions will then be passed on to the eResource Technician who will acquire, renew or cancel resources accordingly.

The application of the matrix will be monitored for the next year to enhance and refine it whenever possible. As well, we hope to be able to apply this same approach to other resource types such as streaming media collections.

Process

We began the process with an environmental scan including a survey of listservs and completion of a literature review. Ideally, we hoped to find a plug and play solution already in existence. We looked for a quick solution, certain that one was available, but after our search yielded no results, we resolved to create our own priority matrix.

MS Excel seemed like a natural solution as it is capable of basic mathematical formulas, is possible to customize, and is cost effective. The next step was to compile a list of the appropriate criteria. Our selection of weighted criteria is:

- Content (x10)
- Required Resource (x10)
- Cost Sharing (x10)
- Cost (x8)
- # of Applicable Programs (x8)
- Cost per Expected User (x8)
- Currency of Content (x6)
- Licensing & Authentication (x6)
- Ease of Use (x6)
- Overlap of Content
- Depth of Coverage
- Opportunity Cost
- Vendor Support
- Perpetual Access
- Brand Recognition
- % of Budget Assigned to Applicable School(s)

We also added an unweighted criteria that is used when needed. “Frequency of course offering” is reserved for use when a resource is “on the bubble”. At that point, it is necessary to review how often the course is offered as that will impact usage stats, particularly with very specific and specialized eResources.

After compiling the list, the next step was to assign a weight to each criteria to ensure that the relative importance of each criteria was considered. For example, if a database package is near perfect in terms of content, should brand recognition dissuade us from making a purchase or renewing a subscription? By weighting each criteria, situations such as this can be avoided. The process of weighting resulted in each criteria being assigned a weight of 1, 2, 4, 6, 8, or 10. The rationale behind the weight assigned to each criteria can be found in Image 4.

Settling on the criteria weighting was the last step before building the matrix in Excel. One Librarian created five worksheets that contain criteria and their descriptions, the criteria weighting and rationale, as well as a place to input our scores for each resource, an automatically calculated results page, and needed data about each database. Our eResources Technician populated the worksheet with data, including usage statistics on each product.

The next phase of the project was to present the product to our Senior Manager and Librarian colleague to solicit and incorporate their feedback. We then went live with the Priority Matrix on November 01 2016.

Outcomes

The Priority Matrix, developed in Excel, contains five worksheets: Evaluation; Results; Criteria Description; Criteria Weighting Rationale, Charts; and Database Data.

Evaluation: Scores for each criteria for each eResource are entered in this worksheet.

Results: Scores recorded on the Evaluation worksheet are auto-calculated in this worksheet and assigned a score of 1-4. The score then determines the decision that we make:

1: high priority purchase/renewal; robustly meets all requirements
2: generally meets all requirements; purchase/renew if funds available
3: meets minimal requirements; purchase/renew with caution
4: meets minimal requirements; purchase/renew with caution

Criteria Description: This worksheet defines each of the criteria, as well as their weight, and description of what to look for when assigning a score.

Criteria Weighting Rationale: This worksheet contains a list of each criteria, the weight assigned to each, and the rationale behind each weight assigned.

Charts: This worksheet uses the data generated in the Evaluation worksheet and displays it as images rather than numbers for optimal visual data representation.

Database Data: Our eResource Technician proactively inputs raw database data needed by the Librarians to make their retention and selection decisions following the criteria outlined in the Priority Matrix. This data includes cost, usage, cost sharing, etc.

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Works Cited