



# University of North Texas

- State-funded public university
- Enrollment of 36,168
  - 29,481 undergraduate students
  - 6,687 graduate students

# UNT Libraries budget

- Almost exclusively provided by student use fee
- Covers all library expenses
- Limits of fee-based budget
  - Only charged to undergraduates
  - Per-credit hour fee capped at 12 hours
  - Budget rises and falls with enrollment
  - Flat enrollment = flat budget = cuts

# 2011: Round 1 of Cuts

- Target: \$750,000
- Deactivation of all YBP approval plans
- 71% reduction of departmental firm money allocations
- Massive E-conversion project

# Round 1 Pros & Cons

- PROS
  - Simple to implement
- CONS
  - Stop-gap measure

# 2012: Round 2 of Cuts

- Target: \$1 million
- Criteria for consideration
  1. Duplication between print and electronic formats
  2. Duplication in another source
  3. Restricted access
  4. Low internal usage/lack of usage
  5. High cost/use
  6. Embargo of less than one year
  7. Embargo of one year with cost greater than \$2000

# Round 2 cont.

- Gathering data
- Liaisons meetings
  - Met individually
  - Provided spreadsheets
  - Asked them to rank each title as 1 – Must Have; 2 – Nice to Have ; or 3 – Can Go
  - Allowed one month to consult with faculty

## Round 2 cont.

- Compiled \$1 million cut
- Revised Target: \$1.25 million
- Provided master cut list to liaisons for review
- Cut list finalized June 22, 2012



# Round 2 Pros & Cons

- Pros
  - Value of data
  - Allowed for liaison/faculty feedback
- Cons
  - Liaisons overwhelmed with info
  - Ranking issues
  - Not enough time/data for in-depth analysis

# 2013: Reprieve

- One time lump sum of money to cover inflation
- Time to plan for 2014 cuts
  - Implement ERM
  - Implement EBSCO Usage Consolidation

# 2014: Round 3 of Cuts

- Target: \$1.25 million
- Focusing on subscriptions > \$1,000
- Looking at Big Deals
- **Using a Decision Grid Process to Build Consensus in Electronic Resources Cancellation Decisions**

*The Journal of Academic Librarianship, Volume 31,  
Issue 6, November 2005, Pages 533-538*

Gerri Foudy, Alesia McManus



Lifting the Veil

# THE UNCOVERING

# Kinds of Data to Collect

## Usual Suspects

Cost

Uses

- Highest & Best Use Measure
- Average of last 3 years

Cost per Use

## Widening the Net

Overlap with other resources

Sustainability or Inflation  
Factor

Librarians' perceptions of  
value

Relevant to the type of  
resource

# Measures Common to Many Resources

Overlap

Usage

Inflation Factor

Librarian's Input

# Overlap

## Ejournals

- Serials Solutions Overlap Analysis

## A&I Databases

- JISC
- Cufts
- Manual comparisons

## Full-Text Aggregators

- JISC
- Cufts
- Serials Solutions

# Usage



Closest to the user

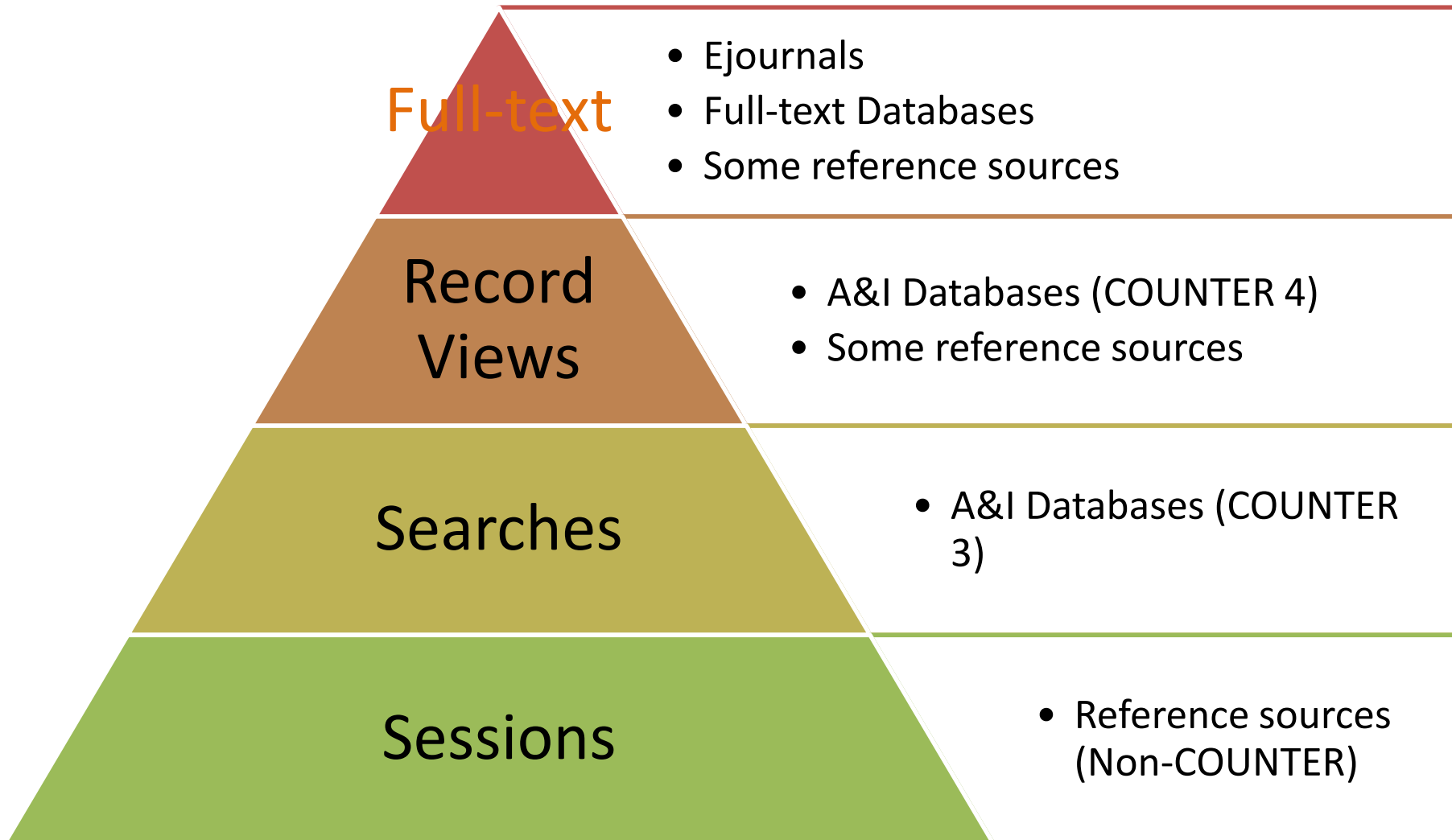
Cost-per-use calculated based on Highest & Best Use measure

Usage measure included in final analysis

Average of the last 3 years



# Highest & Best Use Measure



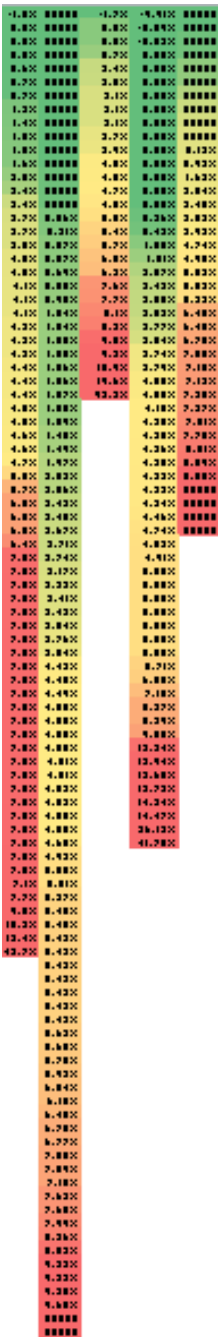
# Inflation Factor

Expenditures from ILS

From last 5 years

Average change per year

Relative to resource type



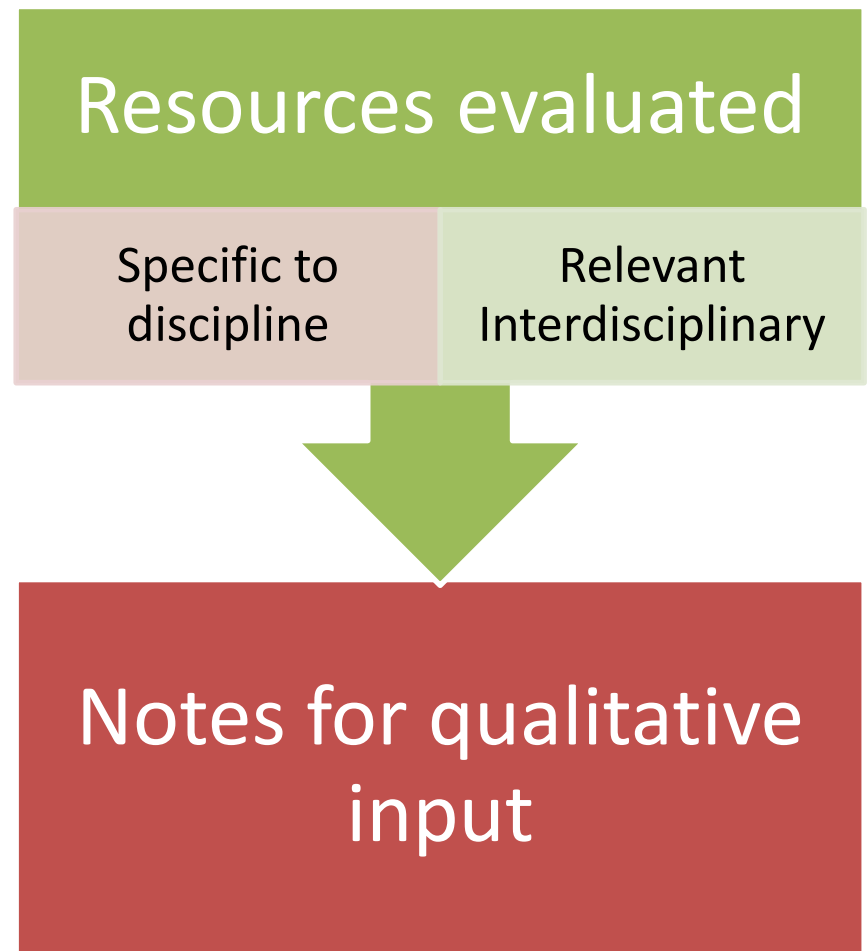
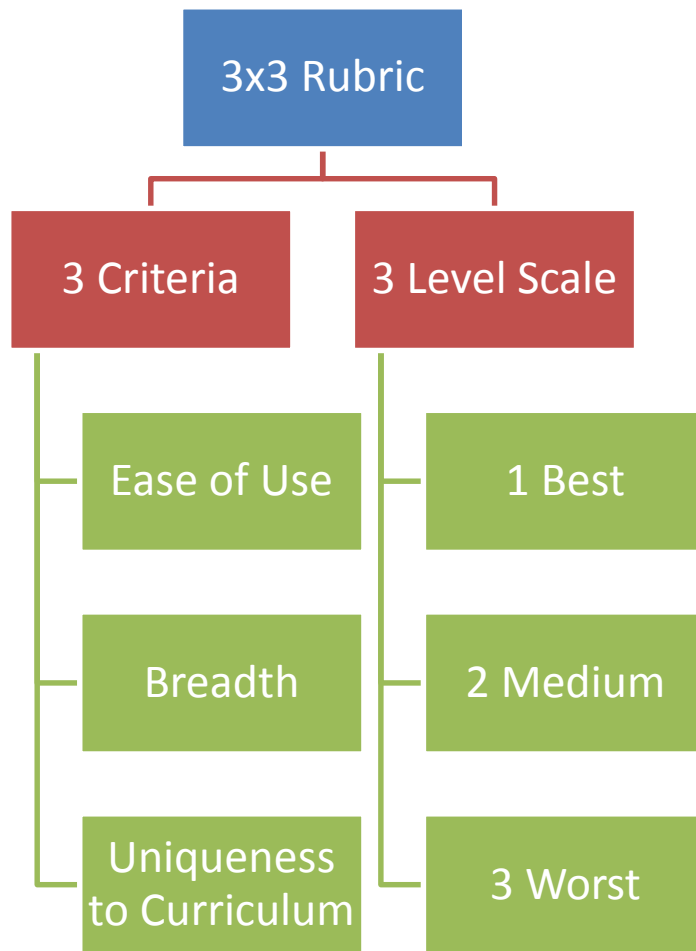
# Distribution of Inflation Factors by Resource Type

- Each column is a Resource Type
- Range
  - 10<sup>th</sup> percentile in green
  - 50<sup>th</sup> percentile in yellow
  - 90<sup>th</sup> percentile in red

# Average Percentage Change Over 5 Years

	Min	10th	25th	33rd	Median	66th	75th	90th	Max
Databases	-19	0.6	4	4	4.5	7	7	7	43
Jnl Package	-22	-1.5	2.5	3	4.5	6	7.5	9	92
Reference	-14	0	0	1.5	4	5	5	13	43
Individual Jnls	-12	-0.9	1	1.5	4.5	5	6	9	43
Print	-24	-20	-3	0.5	5	7	7	8.5	33

# Librarian's Input



# Evaluating Specific Types of Resources

Big  
Deals

Databases  
& Reference

# Assessing Big Deals

## Usual Suspects

Cost

# of Titles

Cost/Title

Uses

Uses/Title

Cost/Use

## Widening the Net

Overlap

Usage Scope

List price

Alternatives

# Serials Solutions Overlap Analysis

Overlap  
status for  
each title

- Unique
- Partial Overlap
- Full Overlap

Total  
Holding  
Overlap

- Source & years covered for each overlapped title



# Summary of Overlap

	A	B
2		
3	<b>Overlap Source</b>	<b># Titles Overlapped</b>
4	ABI/INFORM Global	1
5	Academic Search Complete	29
6	Business Insights: Global	2
7	Business Source Complete	4
8	Environment Complete	4
9	Health Reference Center Academic	3
10	Health Source: Nursing/Academic Edition	2
11	JSTOR Arts & Sciences I Archive Collection	3
12	JSTOR Biological Sciences Archive Collection	1
13	JSTOR Ecology & Botany Archive Collection	1
14	NASA Astrophysics Data System Journals	2
15	ProQuest Research Library	13
16	Psychology & Behavioral Sciences Collection	4
17	Science and Technology	18
18	SocINDEX with Full Text	2
19	<b>Grand Total</b>	<b>89</b>

# Distribution of Usage

How useful is the package to our users?

80% of uses served by ?% of titles\*

- Sort titles by **usage** from **highest to lowest**.
- Calculate **cumulative %** of uses and **cumulative %** of titles for each title.

**Higher** ~ wider spread of usage

**Lower** ~ greater concentration of usage

\*Schöpfel, J., & Leduc, C. (2012). Big deal and long tail: E-journal usage and subscriptions. *Library Review*, 61(7), 497-510. doi:10.1108/00242531211288245

	A	I	J	K
1	Title Name	3-yr Avg	% Uses	% Titles
3	Annual review of public health	372.67	19.1%	5.3%
4	Annual review of sociology	346.67	26.3%	7.9%
5	Annual review of political science	325.33	33.1%	10.5%
6	Annual review of plant biology	311.00	39.5%	13.2%
7	Annual review of physiology	218.33	44.0%	15.8%
8	Annual review of anthropology	212.33	48.5%	18.4%
9	Annual review of biochemistry	210.67	52.8%	21.1%
10	Annual review of immunology	195.00	56.9%	24.1%
11	Annual review of materials research	176.67	60.5%	26.8%
12	Annual review of neuroscience	171.00	64.1%	29.5%
13	Annual review of clinical psychology	137.67	67.0%	31.8%
14	Annual review of cell and development	133.00	69.7%	33.8%
15	Annual review of environment and re	133.00	72.5%	36.8%
16	Annual review of medicine	123.33	75.0%	39.5%
17	Annual review of pharmacology	114.67	77.8%	41.4%
18	Annual review of genetics	104.67	81.9%	47.4%
19	Annual review of physical chemistry	104.67	81.9%	47.4%
20	Annual review of microbiology	98.67	84.0%	50.0%
21	Annual review of entomology	94.67	86.0%	52.6%
22	Annual review of phytopathology	89.67	87.8%	55.3%
23	Annual review of law and social scienc	80.33	89.5%	57.9%
24	Annual review of biophysics	65.67	90.8%	60.5%
25	Annual review of nutrition	63.00	92.2%	63.2%
26	Annual review of genomics and human	62.33	93.4%	65.8%

3-yr Avg Uses sorted Z-A

Conditional Formatting in Excel highlights cells based on values from the 10<sup>th</sup> to the 90<sup>th</sup> percentile.

79.8% 44.7%

Pareto Distribution: ~80 of uses served by ~45 of titles.

# Alternative Models



What would we do if we canceled the package?

List price of each title

Cost-per-use based on the list price (LP CPU)

Compared with the package CPU

# Alternative Models

Big Deals

PPV or Get  
it Now

Flexible

Multiyear  
Committment

Seamless to  
User

High CPU for  
some titles

Lower CPU



# Alternative Model Scenarios

What would we do if we canceled this package?

## Individual Subs

- Highly used titles
- Low List Price CPU

## Alternative sources

- moderately-used titles
- too expensive to subscribe
- titles with short embargo period

## Interlibrary Loan

- All the rest

# Databases & Reference Sources

## Usual Suspects

Cost

Use

Cost per use

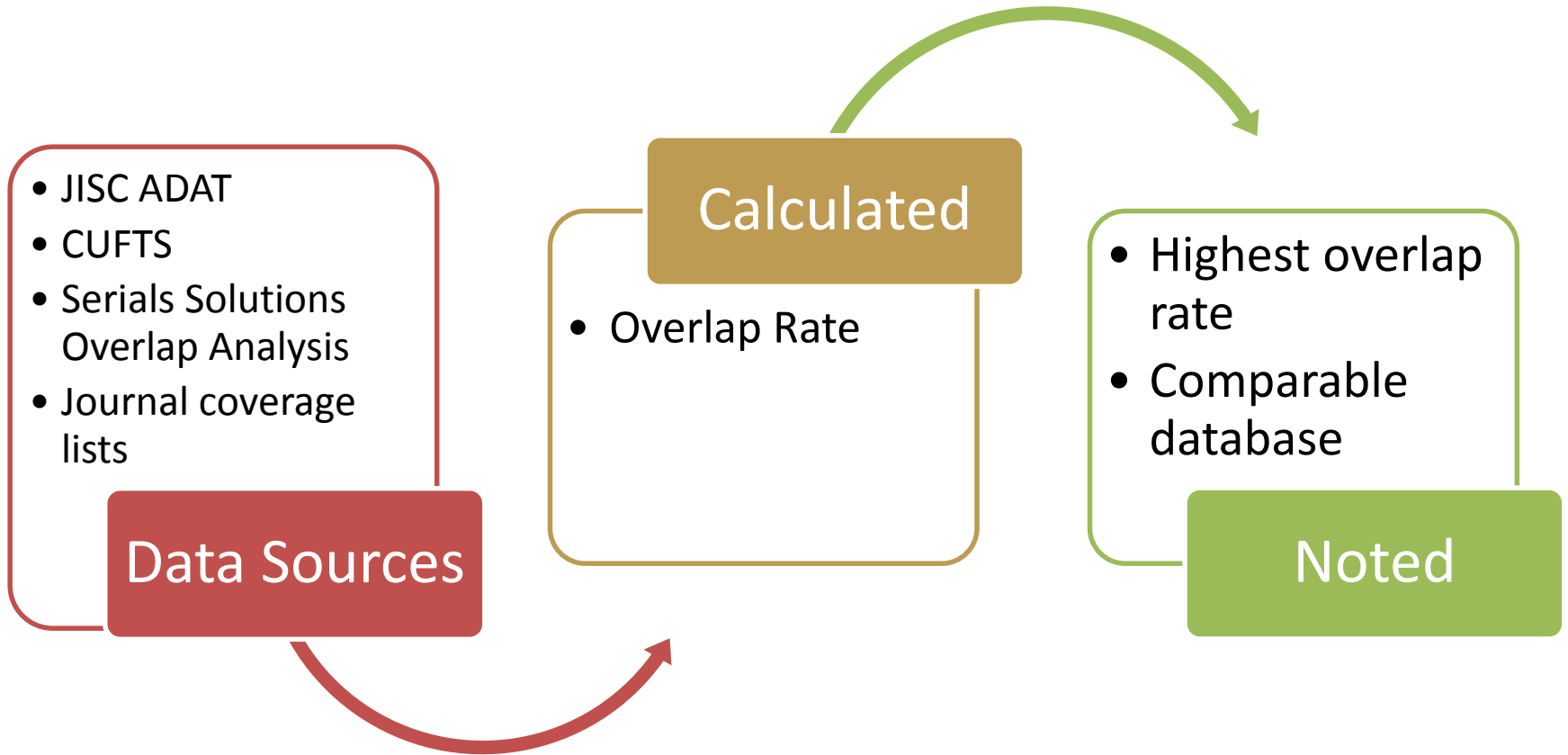
## Widening the Net

Overlap

Serials Solutions  
Linking

- Links-in
- Links-out

# Overlap





**Breadth** **Pareto %**

Overlap Rate

**Ease of Use**

**Links-In**

Overlap Rate Database

Uniqueness

Cost per Use

Inflation Factor

CPU/LPCPU Ratio

**CPU Measure**

**Links-Out**

Comparing the Apples with Oranges

**PULLING IT ALL TOGETHER**

# Criteria for Evaluation

Cost-per-Use

If no usage data, 0

Liaison Ratings

Weighted sum

- Ease of use \* 1
- Breadth \* 2
- Uniqueness \* 3

Inflation Factor

# Scale of Scores



Scale: Percentiles

Relative to  
Resource Type

Composite Score:


- Average of percentiles of criteria

# Master List with All Criteria

ORDER	TITLE	ORD TRACKG	Liaison Ratings Composite Percentile Rank Reverse	Inflation Score Percentile Rank Reversed	CPU Percentile Rank Reversed	Composite Score
o3518024	Communication sciences and disorders do	Database	0.04	0.71	0.12	0.29
o2867114	International journal of audiology	E-Journal	0.113	0.633	0.731	0.49
o2761361	ABI/INFORM	Database	0.521	0.556	0.809	0.63
o4841050	Business Insights: Global	Reference	0.323	N/A	0.317	0.32
o3214771	European journal of information systems	E-Journal	0.902	0.019	0.896	0.61
o324989x	Hoover's online	Reference	0.323	0.463	0	0.26
o468039x	International Journal of Revenue Managen	E-Journal	0.626	N/A	0.079	0.35
o2189872	Journal of information technology	E-Journal	0.902	0.67	0.592	0.72
o4405213	Million dollar database	Reference	0.323	0.657	0	0.33
o4632369	Morningstar investment research center	Reference	0.619	0.538	0.917	0.69
o3023643	RIA checkpoint	Reference	0.04	0.36	0.00	0.13
o4864529	Sourcing Journal	E-Journal	0.626	N/A	0	0.31
o2963243	Thomson ONE banker	Reference	0.04	0.63	0.17	0.28
o4656040	Transportation Research Record	E-Journal	0.902	0.614	0.14	0.55

# Final Analysis

## Master List

- Overall evaluation of each resource
  - Sort by percentile rank for each criteria
- 

## Actions by Fund

- Ensure appropriate distribution of pain
- 

## Notes from Librarians

- Provide insight into utility or user needs

# Actions

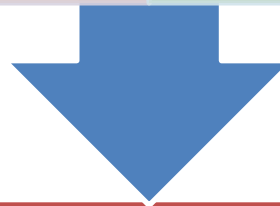
Labeled the action for each resource:

Cancel

Modify

Keep

On Table



Distribution of Actions by Fund

Pain is spread fairly

# Actions by Fund

No fund should have all or none dropped

	<input type="checkbox"/>	Modify <input type="checkbox"/>	On Tab <input type="checkbox"/>	Safe <input type="checkbox"/>
abizp4	68%	0%	27%	5%
achzp4	46%	0%	29%	25%
acstp4	33%	0%	33%	33%
addzp4	0%	0%	33%	67%
aeczp4	100%	0%	0%	0%
aenzp4	40%	0%	0%	60%
agezp4	100%	0%	0%	0%
ahizp4	100%	0%	0%	0%
ajozp4	0%	0%	100%	0%
altzp4	0%	0%	0%	100%
amazp4	82%	0%	9%	9%

# Semi-Final Results



137 Resources Retained

167 Resources Canceled or Modified

\$1.6 million in cost-savings



# Round 3– Next Steps

- Provide master list to liaisons
- Allow time for faculty feedback
- Incorporate suggested swap-outs

# Round 3 Pros & Cons

- Pros
  - Combined objective and subjective data
  - Composite score facilitates sorting and ranking
  - Compared resources by type
  - Feedback from multiple sources
- Cons
  - Time and labor intensive
  - Still gathering usage data
  - Complex

# References

- Foudy, G., & McManus, A. (2005). Using a decision grid process to build consensus in electronic resources cancellation decisions. *The Journal of Academic Librarianship*, 31(6), 533-538. doi:10.1016/j.acalib.2005.08.005
- Schöpfel, J., & Leduc, C. (2012). Big deal and long tail: E-journal usage and subscriptions. *Library Review*, 61(7), 497-510. doi:10.1108/00242531211288245

QUESTIONS?