Providence College

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Collection, Organization, Analysis, and Application of Usage Data to Inform an Academic Library's Annual Electronic Resource Renewal Decisions

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Concluding remarks

With the convenience and time-saving functions of Leganto reading lists, one will wonder if we are nurturing passive students and depriving them of information literacy. However, many teachers indicated they can help the student develop correct citation habits and become familiar with the library. Through the use of the Leganto reading list, the teacher-researcher can share their knowledge on how to locate reading materials and how to manage and organize an ever-increasing list of readings. On the other hand, the student can appreciate the boundless frontier of learning and visit exciting research topics that a course can never have time to explore.

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Collection, organization, analysis, and application of usage data to inform an academic library's annual electronic resource renewal decisions

By Janice G. Schuster, Providence College, Providence, Rhode Island

Introduction

Providence College is a Catholic, Dominican, liberal arts institution of higher education and a community committed to academic excellence in pursuit of the truth, growth in virtue, and service of God and neighbor (Providence College mission statement, 2013). The college has 4,500 FTE undergraduate, graduate, and School of Continuing Education¹ students. The Phillips Memorial Library collaborates with college and affiliate partners to provide patron-focused information and knowledge resources, services, and facilities (Phillips Memorial Library at Providence College mission statement, 2015). The library subscribes to over 100 electronic databases.

Each year the library's Knowledge Collections group, consisting of librarians and staff from all departments/areas, whose primary focus is to evaluate and discuss library resources, agrees upon

Calendar Year Month	COUNTER Database Name	Database	Database	Database	Database	Database Total Item Requests
2020-01	Academic Search Complete	0	33	613	984	542
2020-01	Academic Search Elite	0	0	154	99	99
2020-01	Academic Search Premier	0	0	147	196	193
2020-01	America: History and Life with Full Text	0	0	219	152	24
2020-01	American Antiquarian Society (AAS) Historical Periodicals Collection: Series 1	0	0	118	16	10
2020-01	American Antiquarian Society (AAS) Historical Periodicals Collection: Series 2	0	0	112	2	1
2020-01	American Antiquarian Society (AAS) Historical Periodicals Collection: Series 3	0	0	111	0	0
2020-01	American Antiquarian Society (AAS) Historical Periodicals Collection: Series 4	0	0	111	0	0
2020-01	American Antiquarian Society (AAS) Historical Periodicals Collection: Series 5	0	0	111	0	0
2020-01	APA PsycArticles	0	33	349	728	607
2020-01	APA PsycInfo	0	40	2,392	2,894	0

Figure 1. Statistics spreadsheet.

which of our online resource subscriptions to recommend renewing or canceling. Previously we explained the group's recommendations to the library administration as a separate step, but currently the process is much more streamlined and efficient since members of the library administration participate in the group's discussions. Small groups meet prior to the larger group's meeting, which allows us to focus our efforts on resources whose renewal is not guaranteed.² Cost per use calculations, as well as additional information about each resource form the basis for the discussions.

The HELIN consortium of eight academic libraries in Rhode Island and Massachusetts, which aspires to collaboratively lead innovation in library and information services for the enhancement of higher education and learning (HELIN consortium mission statement, 2019), is the library's fiscal agent. Each year, after Providence College's renewal and cancellation discussions are finalized, I communicate with the HELIN business manager about our decisions.

History

Prior to 2018, we did not have a system for collecting, tracking, analyzing, and visualizing usage of our electronic resources. Our previous Library Services Platform had an Electronic Resource Management component, but our attempt at implementing it was unsuccessful for a variety of reasons. For our annual discussions about renewing our subscriptions, we retrieved statistics directly from our major vendors such as EBSCO and ProQuest, but we also ended up with many vendors for which we had no statistics. Because of that, our renewal/cancellation discussions were based somewhat on usage data, but also relied heavily on other factors including anecdotal knowledge of how faculty and students were using the resource, the resource's usability, and whether it was originally requested by a faculty member.

When we moved to OCLC's Worldshare Management System (WMS) in 2016, we added the License Manager tool to our subscription and began discussing how to implement it. In early 2018, I started adding license records and setting up SUSHI harvesting of usage statistics within License Manager. I began with the vendors the library's Electronic Resources Data Advisory Group, which provides guidance, advice, and support in my implementing License Manager, had agreed were our priorities which were Alexander Street Press, EBSCO, JSTOR, Newsbank, Oxford

		FY 2021-2022 renewal			FY 2020-2021 renewal			FY 2019-2020 renewal	FOLLOW UP FY 2021-2022 ANALYSIS			
Vendor	Database name	FY 2020-2021 cost	COUNTER 5, DR_D1=Database Search report, calendar year 2020	Cost per database search, calendar year 2020	FY 2019-2020 cost	COUNTER 4, DB1 report: Result clicks, calendar year 2019	Cost per result click, calendar year 2019	Cost per result click calendar year 2018	Manda's questions	Janice's response	Janice's response	To as
ACLS	ACLS Humanities Ebooks online											
Adam Matthew Digital	American History, 1493-1945 Archives Direct is the platform. Disregard these figures. Not sure why they show up separately.											
Adam Matthew Digital												

Figure 2. Analysis spreadsheet (some cell contents grayed out).

University Press, and ProQuest. I first added the license record and then set up SUSHI harvesting for each vendor.

2019 was a pivotal year in our data collection efforts. I started working with my library administration colleague to compile, analyze, and visualize usage data for our renewal discussions. Our goal was to have usage data and cost per use calculations for as many of our electronic resources as possible to enable the Knowledge Collections group to make its recommendations based both on data and on anecdotal evidence instead of relying mainly on information we had prior to 2019.

Collection/organization

For our FY22 analysis, I created two spreadsheets: statistics and analysis. To create the **statistics** spreadsheet (Figure 1), I ran the “COUNTER 5 Database Usage Summary” report (DR_D1 database search) in WMS Reports, which pulls the usage statistics from the SUSHI harvests, for the previous calendar year³ and exported the results into separate tabs on a new spreadsheet on our shared OneDrive: “HELIN-renewal-FY22-USAGE-STATISTICS-calendar-year-2020.” I added WMS to the tab name to distinguish the statistics I retrieved from the WMS reports from those I received directly from the vendor or retrieved from their admin tool.

I also ran a COUNTER 5 “Journal Requests (Excluding OA_Gold)” (TR_J1) usage report for calendar year 2020 in EBSCO’s Usage Consolidation service <https://www.ebsco.com/products/ebsco-usage-consolidation> to get usage data for our journal packages that are renewed via our HELIN consortium. I do a separate analysis every summer of usage data/cost per use for our online journal titles that are on our annual EBSCO renewal.

To create the **analysis** spreadsheet (Figure 2), including column and tab colors to indicate previous or current year’s data, follow up, and notes from previous analyses, I made a copy of the previous year’s spreadsheet and changed the filename to “HELIN-renewal-FY22-ANALYSIS.” I added columns for the new COUNTER statistics. I copied the follow up section from the FY21 analysis for both the databases and the e-journal packages and pasted into new tabs for reference on the FY22 analysis spreadsheet: “Database notes FY21” and “Journal packages notes FY21.”

The tabs on the analysis spreadsheet currently include Databases, Journal packages,⁴ Pricing,⁵ License details,⁶ Janice get stats directly FY22,⁷ Database notes FY21, Journal packages notes FY21, and Colors.⁸

To summarize: The **statistics** spreadsheet contains usage data for each resource from the WMS and Usage Consolidation reports and statistics I receive directly from the vendor or retrieve from the vendor's admin tool. The **analysis** spreadsheet contains the name and current fiscal year's price for each resource, current and historical COUNTER statistics and cost per use, and details about my follow up.

Analysis

We use the current fiscal year pricing for cost per use calculations since that is the price included on our HELIN resource spreadsheet. The usage statistics are from the previous calendar year. The Data Advisory Group agreed it was acceptable for the two time periods to be different.

My library administration colleague copies price information for each resource from the "Pricing" tab on the analysis spreadsheet (Figure 2) and pastes it to the "Databases" tab, "FY 2020-2021 cost" (column C) on the same spreadsheet. She copies usage data from each tab on the statistics spreadsheet (Figure 1) and pastes it to the "COUNTER 5, DR_D1 = Database Search report, calendar year 2020" column (D) on the analysis spreadsheet (Figure 2).

To calculate the "Cost per database search, calendar year 2020" (column E) on the analysis spreadsheet, she divides the FY 2020-2021 cost (column C) by the number of database searches (column D). She does the same calculations for each package in the Journal Packages tab on the analysis spreadsheet as well.

We encountered many questions and issues during the analysis phase of the project. For example: Why do we have statistics on the WMS report but no listing for the resource on the HELIN spreadsheet? That is, it appears we have usage data for resources to which we do not subscribe. I contact the vendor and HELIN. Sometimes the statistics are due to a trial, but since we did not end up subscribing to the resource, we disregard the data. Usage of the statewide AskRI <https://www.askri.org/> databases is also sometimes included in the WMS report, but since we do not subscribe to those either we disregard that data also.

How to get statistics for databases that do not appear on the WMS Report? I contact vendors and ask either for credentials to get SUSHI harvesting set up in WMS License Manager or credentials to retrieve the usage data from the vendor's admin tool or the statistics directly.

How to reconcile the database name that appears on the WMS statistics report with the name on the HELIN spreadsheet? These are often different from the name that appears on our list of databases on the library's website <https://pml.providence.edu>. I contact vendors and the HELIN business manager to reconcile the names.

I record how I resolve each issue in the "follow up" columns on the analysis spreadsheet, which my collections services colleague copies into the License Manager records as described above. The License Manager records form the basis for the "License details" tab on analysis spreadsheet.

Application

In 2020, the renewal process for our electronic resources for FY21 was extraordinary due to the pandemic. Providence College's financial status was unknown, but we anticipated we would be asked to reduce our expenditures, which meant our cost per use calculations and other information about our electronic resources were even more important than usual. Normally after we calculate cost per use for as many of our resources as possible, the group meets to discuss our recommendations. In 2020, the assistant library director⁹ suggested we find at least fifteen

resources that could potentially be canceled due to high cost or low/no use. We took two steps to meet that goal which were not normally part of our process: (1) Three of us from the group met to identify low-use, high-cost resources based on our cost per use data. (2) We then met with two others from the group to further refine the list of potential cancellations. Based on both above discussions, I created two additional tabs on the FY21 analysis spreadsheet: “Possible cancel DB working” and “Possible cancel Ejournal packages.”

The Knowledge Collections group then met to discuss our renewal/cancellation recommendations. We focused on the “Possible cancel” tabs since it was understood most of the other resources would need to be renewed with little or no discussion since they are essential to support the curriculum and meet the needs of Providence College’s faculty and students.

The cost per use data was integral to our discussions. It provided valuable information for the initial meetings to identify potential cancellations, which in turn allowed the group to focus on potential cancellations and not spend time discussing crucial resources we knew we would be renewing. I plan to follow the same process in 2021 for our FY22 discussions.

Future improvements

I plan to continually improve how I collect, track, analyze, and visualize our usage data, to ensure the data remains an integral part of the Knowledge Collections group and the library’s strategic decisions about our electronic resources.

After we finish our analysis for FY22, we will have cost per use data for three years for the database analysis (calendar years 2018, 2019, 2020) and two years for the journal packages analysis (calendar years 2019 and 2020). I plan to do more with visualization of the historical data to identify trends. My library administration colleague is familiar with Tableau; I would like to become familiar with it as well to aid in the visualization. I also plan to use the graph/chart tools in Excel to illustrate the trends in cost per use.

When we were asked in 2020 to identify potential candidates for cancellation, we added two steps to our process; see steps 1 and 2 above in the “Application” section. I would like to keep those steps as part of our process from now on and use them to create the additional tabs on the analysis spreadsheet: “Possible cancel DB working” and “Possible cancel Ejournal packages.” Those tabs facilitated a more focused discussion in the group in 2020 since we were able to concentrate on the resources that were potential cancellations and not spend valuable time on those resources which most likely would need to be renewed regardless of cost per use. If my colleagues agree, I would like to continue that process for our FY22 and future analyses.

I also plan to ask my collections services colleague to add the details from the follow up columns on the analysis spreadsheet to the description field of the WMS License Manager records each year, which will form the basis for the “License details” tab on each year’s analysis spreadsheet.

To decrease the need to retrieve statistics directly from vendors or their admin tools, I will set up additional SUSHI harvesting in WMS License Manager. I also added six platforms to our Usage Consolidation subscription for 2021, so in the future we will be able to get additional statistics from the UC reports.

In past years, we ended up with many tabs on the analysis spreadsheet. For this year and in the future, I plan to simplify the spreadsheet to make the group’s discussions more efficient, such as minimizing the number of tabs in the final version of the spreadsheet.

Conclusion

Our data on the usage of our electronic resources informed all our cancellation/renewal discussions for FY21 and gave us a sound basis on which to recommend canceling eleven of our

resources representing 13% of the library's overall electronic resource renewal cost. This included some resources that were past one-time purchases and for which we were paying annual hosting fees. The group agreed we should not continue paying the hosting fee if the resource no longer met the needs of current faculty and students.

For our FY22 analysis and beyond, I plan to continue to improve upon our collection, organization, analysis, and application methods to provide useful data, including visualization of historical and current data on the usage of our electronic resources. The goal is to help the library achieve its mission of providing resources to support Providence College's curriculum and the needs of its faculty and students in the most fiscally responsible way possible.

Notes

1. Night school.
2. See Application section for further details about the small groups.
3. The Electronic Resources Data Advisory Group agreed that we should use the previous calendar year's usage statistics for our calculations.
4. Our renewal includes mainly databases, but there are some online journal packages included, e.g. Springer Nature journals, etc., so the analysis spreadsheet has separate tabs for databases and online journal packages.
5. This is the spreadsheet of pricing that our HELIN consortium business manager receives from the vendors.
6. In previous years, I documented what I did in the "follow up" columns on the analysis spreadsheet. After we finished the project, my collections services colleague copied and pasted the details from the follow up columns into the description field of our OCLC WMS License Manager records. This included notes from the group's discussions about the renewal. Now I download all the License Manager records to a spreadsheet, delete all of the columns except for the vendor name and description, and add that sheet as the "License details" tab to the analysis spreadsheet. The goal is to have all of the details about the vendors: how we retrieved the statistics, contact information, summary of our Knowledge Collections group discussions, etc., in a centralized place instead of having to search across multiple spreadsheets.
7. When there is no data on the statistics spreadsheet for a resource, my library administration colleague adds the vendor and database name to this tab. I follow up by either retrieving the stats from the vendor's admin tool (if I already have credentials) or by asking the vendor for admin tool credentials or for the statistics directly.
8. Contains the meaning of the various highlight colors: waiting for reply from vendor, follow up or questions completed, skip or disregard, on another tab, etc.
9. Currently the Interim Associate Library Director

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