



How to Use a Scorecard to Objectively Evaluate Electronic Resources

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Why the scorecard?

- Cancellation decisions can be tricky. They can also become political and the users of our electronic resources may feel quite passionately about the resource and the need for continued access.
- A lot of the factors that are part of the decision to renew or cancel a subscription are based on professional judgement and evaluation. A scorecard captures those elements so a stakeholder outside the library can see and understand how the decision was made.
- A scorecard presents an opportunity to document a decision and why a decision was made.

The overall workflow

- Select the criteria to use in evaluating your library's electronic subscriptions
 - Examples: high use as demonstrated by COUNTER usage data; minimal content overlap with other licensed or Open Access resources; positive feedback or recommendation from subject liaison.
- Decide the value of each criterion (points per criterion)
- Apply any optional weighted values
- Gather data
- Calculate the score for each criterion and total the score for the resource
- Prioritize resources based on score

Electronic Subscription Evaluation Scorecard - Databases

Value	Total Possible Points (20)	Points Earned
Usage Statistics See <i>Usage Statistics Worksheet</i>	10	
Librarian Liaison Feedback See <i>Librarian Liaison Worksheet</i>	10	
Content Overlap See <i>Content Overlap Worksheet (Negative point value)</i>	0	
Total Earned Points _____ out of 20		

Electronic Subscription Evaluation Scorecard - Journals and Journal Packages

Value	Total Possible Points (25)	Points Earned
Usage Statistics <i>See Usage Statistics Worksheet</i>	10	
Librarian Liaison Feedback <i>See Librarian Liaison Worksheet</i>	10	
Cost per Download <i>See Cost per Download Worksheet</i>	5	
Alternative Access Options <i>See Alternative Access Options Worksheet (Negative point value)</i>	0	
Total Earned Points _____ out of 25		

Usage Statistics Point Calculation

Usage Statistics Points Calculation

Resource Type:

Audience:

Discipline(s) Supported by Resource:

Select One:

- High Usage (10 points)
- Moderate Usage (5 points)
- Low Usage (3 points)
- Very Low Usage (0 points)

The earned points for the following resource types should be multiplied by a factor of 2:
Abstract & Index Databases and Online Reference Works & Statistical Resources.

Liaison Librarian Electronic Subscription Worksheet

Resource Information:

Resource Title:

Content Provider:

Type of Resource:

FY 2019/2020 Renewal Cost:

Questions to Consider:

Who is the audience for this resource?

(academic department(s), major(s), individual faculty members, classes, etc)

What is the perceived benefit of this resource for its audience?

Resource Ranking:

On a scale of 1 to 5 with 5 being the most well, how well does this resource support the teaching and research endeavors of its audience?

Comments:

Librarian Liaison Points Calculation

Resource ranking from liaison multiplied by a factor of 2.

Example Completed Worksheet

Resource Information:

Resource Title: Anthropology Plus

Content Provider: EBSCO

Type of Resource: Abstract and Index Database

FY 2019/2020 Renewal Cost: \$4,909.05

Questions to Consider:

Who is the audience for this resource?

(academic department(s), major(s), individual faculty members, classes, etc)

This is used by students and faculty in the Anthropology Department. I teach around 20 ANTH-specific courses each academic year, and it is also used in classes that I am not embedded in.

What is the perceived benefit of this resource for its audience?

Anthropology Plus is the best resource available for anthropology research because it's index is so comprehensive and far reaching. The faculty use it and so do students; when you consider how high the usage stats are for a department with 7 FTE faculty and about 100 majors, it shows they are utilizing it.

Resource Ranking:

On a scale of 1 to 5 with 5 being the most well, how well does this resource support the teaching and research endeavors of its audience?

5

Comments:

This is an essential resource for me, students, and the faculty.

Librarian Liaison Points Calculation

Resource ranking from liaison multiplied by a factor of 2.

Content Overlap Worksheet (Databases)

Resources with full text article content will be analyzed for content overlap with library resources of similar subject coverage as well as stable openly available resources on the Web. Based on the results of the analysis, resources will have points deducted from their overall score:

Resources with 25% or less content overlap with a library or Open Access resource
(0 points)

Resources with 26% to 50% content overlap with a library or Open Access resource
(-3 points)

Resources with 51% to 75% content overlap with a library or Open Access resource
(-5 points)

Alternative Access Options Worksheet (Journals)

Journals with access available in a licensed database or Open Access are scored using the following point values:

Full text access available without an embargo (-5 points)

Full text access available with an embargo period of one year or less (-3 points)

Full text access available with an embargo period of longer than one year (-1 point)

Cost per Download Worksheet (Journals)

The cost of a journal subscription will be compared to the number of instances articles were accessed from the journal or journal package to determine if it was more cost effective to renew the journal subscription or rely on article access via Interlibrary Loan. Journals and journal packages are scored using the following point value:

Cost per Download Value:

\$0.00 to \$5.00 (5 points)

\$6.00 to \$10.00 (3 points)

\$11.00 to \$15.00 (1 point)

Greater than \$16.00 (0 point)

Ways to Customize the Scorecard

What matters most to your library?

These factors can be added to your scorecard with an associated point value

- Resources which serve multiple departments or programs, or faculty members?
- Resources which support new faculty or new academic programs?
- Electronic resources which replace print volumes and therefore save physical space?
- Resources that are likely to be used more frequently during a period of remote learning (such as streaming film databases and ebooks)?

Challenges to the Scorecard

- Usage data
 - What is considered high usage? What is high usage for an aggregate database? A&I database? Journal package? eBook package? Electronic reference material?
 - How to handle resources without COUNTER-compliant statistics?
- Getting meaningful feedback
 - Bringing liaison librarians up to speed with usage metrics and overall criteria in evaluating resources
- Time and effort
 - Harvesting usage data, conducting overlap analysis, checking for embargoes, and sharing data with liaisons
 - Coordinating a librarian liaison evaluation worksheet for each resource
 - Compiling all data into a spreadsheet and prioritizing each resource

Local Considerations

- How and when to involve the faculty in decision-making?
- What scores to use as thresholds for renewal and cancellation?

Resources

Download a copy of SUNY Geneseo's Electronic Subscription Evaluation Scorecard from Google Drive
<https://drive.google.com/drive/folders/1V3ITDLm4XILbLmHIBbV4W8bipjWcoz0E?usp=sharing>

SLSS webinar on using Overlap Analysis tool recording:
<https://public.3.basecamp.com/p/44Fx68y94oJ5KDthmVh8H9w8>

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Foudy, G. and McManus, A. (2005). Using a decision grid process to build consensus in electronic resources cancellation decisions. *Journal of Academic Librarianship* 31(6):533-38. doi:10.1016/j.acalib.2005.08.005.