Rolling Out a Database Review:
Initiating a Comprehensive Database Review at the University of Maryland Libraries

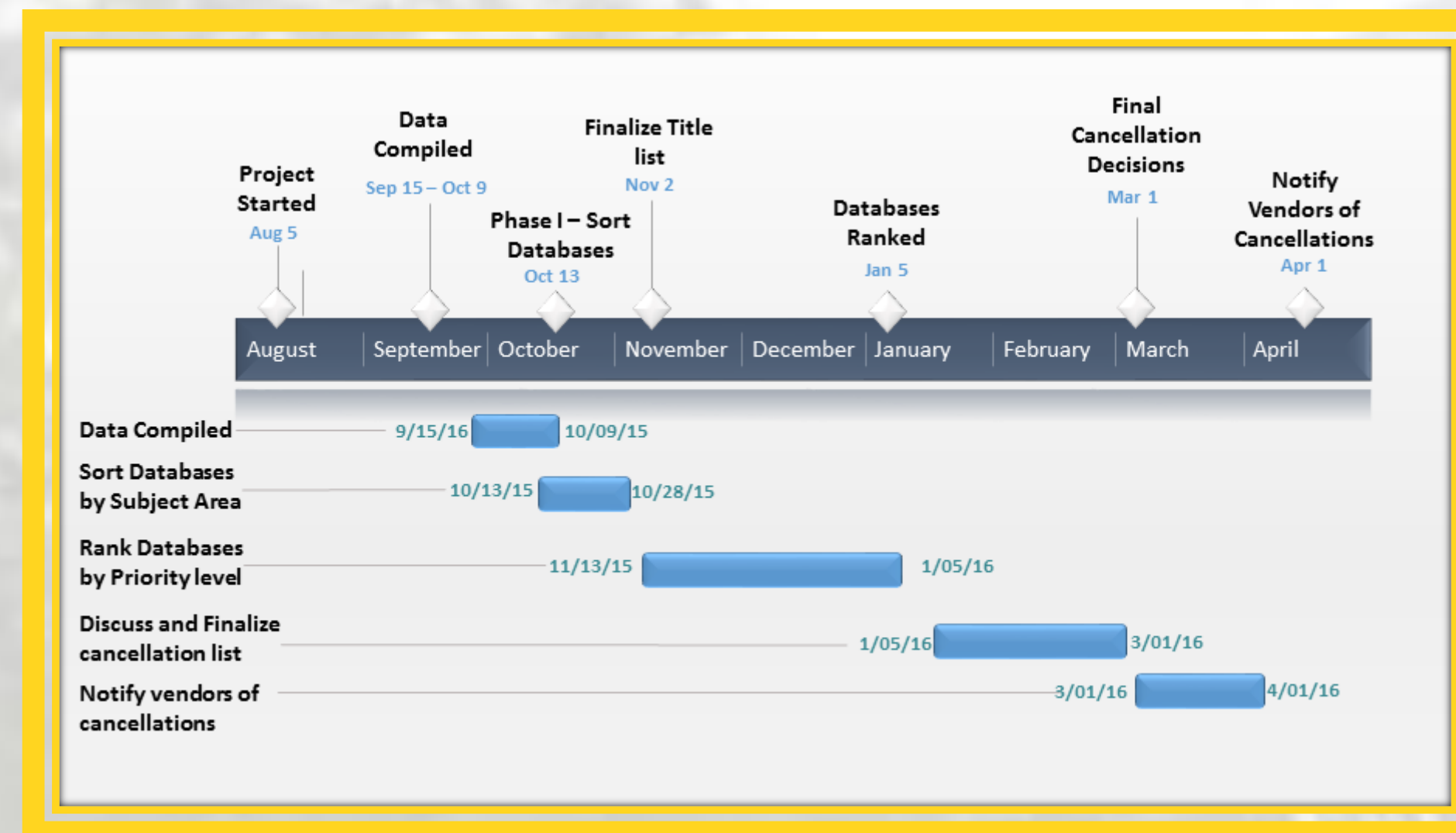## Leigh Ann DePope and Maggie Saponaro

Background

UMD's Budget Situation
- 87% of the collections budget devoted to electronic resources
- 92% of the collections budget is spent on continuing costs
- Static budget for 14 years
- Mitigation efforts included:
  - Moving to consortia and/or multi-year agreements wherever possible
  - Hold-back of discretionary funds
  - Fine-tuning the approval plan for cost savings

Budget Implications
- Increasing continuing resources costs outpaced mitigation efforts
- Savings from serials cancellations would not be realized quickly enough to impact current budget
- Factors combined into a need for an immediate review/cancellation of databases

Timeline and Process

Who Was Involved
- Associate Dean for Collection Strategies and Services
- Head of Acquisitions
- Interim Head of Collection Development
- Electronic Resources Librarian
- Subject Specialists

Planning Phase
- Initial budget review Summer 2015
- Review process developed and shared with Subject Specialists – September 2015

Phase 1 – Database Sort
- Initial list of titles by fund codes then sorted into subject groups
- Subject Specialists finalized database list by subject groups
- General databases were assigned to the Collection Development Council (CDC)
- Feedback solicited from Subject Specialists on data elements needed to aid in the decision-making process

Phase 2 – Database Rankings
- Databases ranked into one of three levels
  - 1= Top priority to maintain
  - 2= Mid-level priority
  - 3= Lowest priority
- Each subject group was given a cancellation target for each level
- Excel workbooks were posted on Box (an online file sharing service)
- Subject Specialists reviewed and assigned databases a priority level
- Compiled lists were shared with CDC
- Cancellation decisions were made from titles with a level 3 ranking
- The final list was reviewed and approved by CDC

Communication

Facilitating Transparency for Subject Specialists
- Created and shared a spreadsheet available via Box
- Spreadsheet has several useful fields, including a date (Subscription Period) to indicate when the database subscription ended
- Spreadsheet was regularly updated as vendors were contacted and LibAnswers entries created

Notifying the Campus Community
- Used LibAnswers to explain cancellation and point to equivalent products
- Assigned LibAnswers contact (Subject Specialist) to each database canceled.
  - Contact created an entry in LibAnswers indicating when the database would be canceled, alternatives (if any), and a contact person for more information
  - Created a LibAnswers entry template and guidelines for Subject Specialists
- Entries in Database A-to-Z list point to LibAnswers entry
- Additional communication efforts included library website announcements and LibGuide updates

Data Provided

Spreadsheet Design – Phase I
- Order data from ILS
  - Title
  - Order Number
  - Subscription Period
  - Budget Code
  - Material Type
  - Consortia Group Code
- Usage Data (COUNTER and non-COUNTER)
  - Regular Searches (or equivalent)
  - Cost Per Use
  - User Limits
- Notes
  - Comments from Acquisitions staff or Subject Specialists

Phase II - CDC
- Priority Ranking by Subject Specialists
- Average Ranking

Phase II – Subject Group
- Priority Ranking by Group Consensus

Phase I spreadsheet –
Used to sort databases by subject

Phase II spreadsheet –
Used to rank databases by priority

Outcomes

Review Results
- 37 databases canceled as of 9/21/16
  - Includes two centrally-funded resources
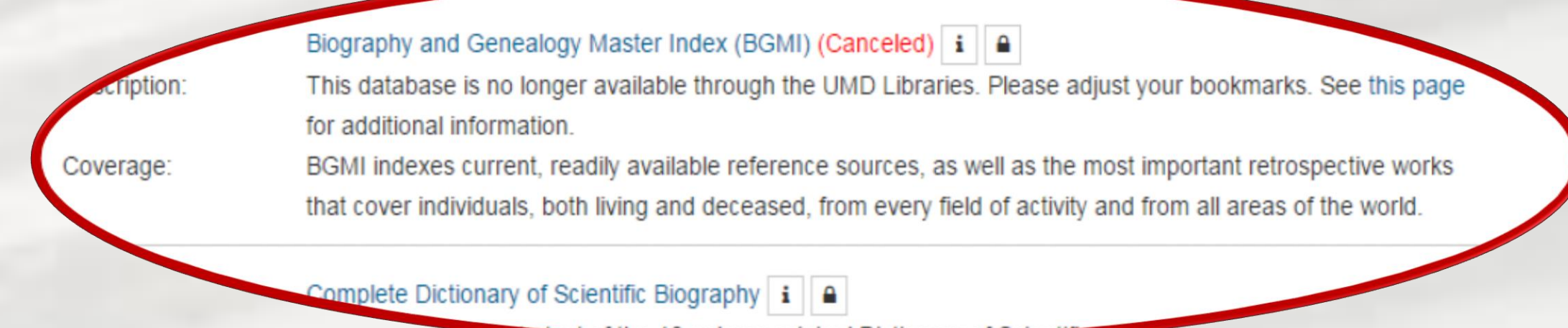- FY16 savings: $78,110
- FY17 and beyond savings: $322,336.77

What Worked Well
- Cloud-based folders/spreadsheets for collaborative work
- Final cancellation spreadsheet
- Database A-to-Z list/LibAnswers entries

Opportunities for Improvement
- Interdisciplinary databases were assigned to only one subject group
  - Share entire title list by subject group assignment with all Subject Specialists before creating subject specific workbooks
- Costs were to be evenly distributed between the levels
  - This was not clearly communicated
  - Needs to be more strictly enforced in the next review
- Many titles were already renewed by the time decisions were made
  - Savings could not be realized in the current fiscal year
  - The process needs to start earlier

Database A-to-Z list entry

LibAnswers entry

UNIVERSITY LIBRARIES