Applying Performance Measurement to Safeguard Budgets: Qualitative and Quantitative Measurement of Electronic Journal Packages.

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• The UK's only wholly postgraduate university focused on science, technology, engineering and management
• One of the UK's top five research intensive universities
• Annual turnover 2010/11 £169m
• Over 40% of our students study whilst in employment
Expenditure on Journals

<table>
<thead>
<tr>
<th>Year</th>
<th>£</th>
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<tbody>
<tr>
<td>2006-07</td>
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<td>2007-08</td>
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<td>2008-09</td>
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<td>2010-11</td>
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<td>2011-12</td>
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Information Expenditure by Format 2010-11

- Databases: 24%
- Print Books: 4%
- eBooks: 4%
- Print Journals: 5%
- eJournals: 63%
Information Expenditure by Format 2010-11

- Print Books: 4%
- eBooks: 4%
- Print Journals: 5%
- eJournals: 25%
- Big Deals: 38%
- Databases: 24%
Evaluating the Big Deals

Requirements:

- Systematic
- Sustainable
- Internal benchmarking
- Elevator pitch
- So what?
- Enable informed decision making
- Demonstrate smart procurement
New Approach

Quantitative:
• Size
• Usage
• Coverage
• Value for Money

Qualitative:
• Academic Liaison
• Reading Lists Review

Quantitative Metrics
Including:

- Average number of downloads per title
- % of titles with zero downloads
- Average cost per title
- Usage of core titles
- Cost per full-text download
  - Overall
  - For each core title
- Three-year trends for most popular titles
- Number of core titles in Top 30 most popular titles
Considerations

• When to measure from/to?
  • calendar, financial/academic, or contract year?
• Which titles make up our core collection?
• Do we have access to all of the ‘zero use’ titles?
• What constitutes Low/Medium/High?
• What about the aggregator usage statistics?
• Do we trust the usage statistics?
• What is the size of the target population?
Subscribed Titles

For each core title the cost, downloads, and cost-per-download categorised:

- Zero
- Low
- Medium
- High
- Cancel?
Systematic Analysis

- Excel Template using three main data sources:
  - COUNTER JR1
  - Subscription agent financial report
  - Student and Staff population data
- Automated as much as possible
- Match formulas working with ISSNs to link title price to usage/holdings
- All calculations are completed automatically when the data sources are added
- Results fit onto a one-page printout
Quantitative Reporting

- Systematic 😊
- Sustainable 😊
- Internal benchmarking 😊
- Elevator pitch 😊
- So what? 😞
- Enable informed decision making 😞
- Demonstrate smart procurement 😞
Qualitative Measures: Academic Liaison

• Who is using it?
  • Why?
  • How?
• Who is recommending it?
• How valuable is it?
• What will be the impact if we cancel?
  • Teaching?
  • Research?
Effective Knowledge Management

- The Barrington Liaison Tool (BLT)
- Customer Relationship Management tool developed to capture academic liaison
- Integrated with Enquiry Tracking system
- Web based & device generic
- Reporting on resource usage
Analysis of course reading lists:
• What are our academic recommending?
• Where is it published?
• How often is it recommended?
Quantitative & Qualitative Reporting

• Systematic 😊
• Sustainable 😊
• Internal benchmarking 😊
• Elevator pitch 😊
• So what? 😊
• Enable informed decision making 😊
• Demonstrate smart procurement 😊
Using the Results

What they can do:

- Both qualitative and quantitative measures tell the story of the resource
- Aid decision making
- Justify procurement
- Safeguard budgets...?
What they can’t do:
Closing thoughts

• Is it worth investing in this?
• Qualitative **AND** Quantitative
• Danger of relying on cost-per-download


Lib-Stats discussion list and archive: http://www.jiscmail.ac.uk/LIB-STATS


Joint Usage Statistics Portal (JUSP): http://jusp.mimas.ac.uk/
Thank You!

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