



Fall 10-2024

Evidence Based Assessment of Evidence Based Acquisitions

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Recommended Citation

Birchhall, Braith; Devarenne, Sidonie; and Wegmann, Mary, "Evidence Based Assessment of Evidence Based Acquisitions" (2024). *Western Libraries Faculty and Staff Publications*. 78.

https://cedar.wwu.edu/library_facpubs/78

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Evidence Based Assessment of Evidence Based Acquisitions

Braith Birchhall- Electronic Resource Manager
Sid Devarenne- Collection Management and Assessment Librarian
Mary Wegmann- Assistant Director of Collections



Mary Wegmann:

Thank you for attending our session about developing an EBA assessment program. My name is Mary Wegmann and I am here with my colleagues Braith Birchhall and Sid Devarenne from Western Washington University in Bellingham, WA. We are going to share an overview of the assessment and workflow we developed for extension decisions about our two EBA programs.

Background

- Scholarly Resources Group (SRG)
- Established management and assessment processes
 - Subscription review
 - <https://library.wvu.edu/subscription-review-scoring>
 - Firm order acquisitions reports
- EBAs
 - Purchased on the one-time/big-ticket fund
 - Not included in the subscription review
 - Program cycles do not align
 - CMA developed a holistic and routine assessment

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Mary Wegmann:

Braith, Sid and I make up the Collection Management and Assessment department. We are the department that is primarily responsible for collecting and analyzing data about the collections, but decision making about the collections usually takes place in the Scholarly Resources Group. The SRG is comprised of Collection Services personnel and liaison librarians. We meet once a month to discuss topics related to the collections and curricular support.

We have several existing processes in place to manage and assess our subscriptions and firm order purchases. We engage in an annual subscription review during which we evaluate our current subscriptions and new subscription requests and we report on our recent firm orders on a recurring basis.

Participation in EBA programs comes out of our one-time/big-ticket fund. Even though participation in the EBA programs is technically a one-time cost, they function more like a subscription in our collections portfolio, but are not included in our annual subscription review where we evaluate our other ebook packages. Additionally the two EBA programs we participate in expire at opposite ends of the academic year, making it challenging to consider them in tandem. To try and address some of these issues, we developed an EBA specific assessment plan that we have now used for one review cycle.

With that background, I am going to turn it over to Braith.

Choosing data points

Original data points

- Title-level usage
- Print and electronic duplication (purchased and/or subscription access)
- Consortial holdings

New data points

- Library holdings
- % titles used
- Cost per used title
- Total usage
- % of content held by Summit institutions
- Cost per title
- Curricular use

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Braith Birchhall:

For selecting titles to add to our permanent collection at the end of the EBA period, we collect data on title usage, overlap with print and electronic holdings, and number of Orbis Cascade Alliance libraries holding the title to indicate ILL availability. This data is used on a title level to select items and not used to evaluate the EBA program as whole.

To evaluate EBA programs, we started with applying those same metrics at the collection level. Because the two programs are very different, just looking at cost per book or cost per use privileges EBA X because of its high volume of books. To make a more meaningful comparison, we looked at what percent of books in the program were used, and cost per used book. We included the number of books placed on course reserve to indicate curricular importance. To evaluate ILL availability, we noted the number of titles with fewer than 4 and between 4-8 copies in Alliance print holdings. We hoped that these more wholistic metrics would give context to the two EBA programs and help decision-makers assess their value to the university.

Here is Sid for more information about the assessment.

Priority	Data point	What does this tell us?	How would this information impact decision-making?	Data Source(s)	Data collection steps; Calculations	Difficulty/Estimated time commitment
1	Orbis Cascade Alliance holdings	How quickly patrons could obtain a print copy of the title through consortial lending.	Turnaround on Summit requests is 2-3 days and the loan period is 6-12 weeks. Depending on the demand/need for a title, high availability through Summit could			
1	Electronic and physical duplicates	Other access options (physical and electronic) already available to patrons.	In almost all cases the Libraries will not purchase an ebook if an ebook copy was already purchased on a different platform.			
1	# of titles used vs. cost to access those titles	Annual cost per used title.				
1	Usage stats for most-used titles	Actual numbers for usage (rather than ranking). Whether titles that have high use among EBA titles are actually high use compared to other resources				
1	Course reserves usage	Relevance of EBA content to curriculum; Titles that would have a significant impact if we lost access;				
1	Percent of titles from full EBA program with use					
1	Ebook usage on other platforms	Benchmark for ebook usage. How usage of EBA titles compares to ebook usage in other collections.				
2	WorldCat holdings	Ease of access to chapters through ILL; How quickly our patrons could obtain a print copy of the title through ILL.	Depending on the demand/need for a title, high availability via non-consortial ILL could meet patron needs. Delivery times for print copies are generally longer than Summit and loan periods might be			

Sid Devarenne:

Because we were developing what we hope will become an ongoing assessment procedure, we wanted to make sure that we were documenting our process so that we could replicate our steps with each cycle and identify where we wanted to make adjustments each time we tested this procedure. To do this, we created a spreadsheet template that we could use for planning, implementing and documenting our project.

We used this Data Points tab for project brainstorming and scoping.

Priority	Data point	What does this tell us?	How would this information impact decision-making?	Data Source(s)	Data collection steps; Calculations	Difficulty/Estimated time commitment
1	Orbis Cascade Alliance holdings	How quickly patrons could obtain a print copy of the title through consortial lending.	Turnaround on Summit requests is 2-3 days and the loan period is 6-12 weeks. Depending on the demand/need for a title, high availability through Summit could			
1	Electronic and physical duplicates	Other access options (physical and electronic) already available to patrons.	In almost all cases the Libraries will not purchase an ebook if an ebook copy was already purchased on a different platform.			
1	# of titles used vs. cost to access those titles	Annual cost per used title.				
1	Usage stats for most-used titles	Actual numbers for usage (rather than ranking). Whether titles that have high use among EBA titles are actually high use compared to other resources				
1	Course reserves usage	Relevance of EBA content to curriculum; Titles that would have a significant impact if we lost access;				
1	Percent of titles from full EBA program with use					
1	Ebook usage on other platforms	Benchmark for ebook usage. How usage of EBA titles compares to ebook usage in other collections.				
2	WorldCat holdings	Ease of access to chapters through ILL; How quickly our patrons could obtain a print copy of the title through ILL.	Depending on the demand/need for a title, high availability via non-consortial ILL could meet patron needs. Delivery times for print copies are generally longer than Summit and loan periods might be			

Sid Devarenne:

First, we listed potential data points to include in the assessment.

Priority	Data point	What does this tell us?	How would this information impact decision-making?	Data Source(s)	Data collection steps: Calculations	Difficulty/Estimated time commitment
1	Orbis Cascade Alliance holdings	How quickly patrons could obtain a print copy of the title through consortial lending.	Turnaround on Summit requests is 2-3 days and the loan period is 6-12 weeks. Depending on the demand/need for a title, high availability through Summit could			
1	Electronic and physical duplicates	Other access options (physical and electronic) already available to patrons.	In almost all cases the Libraries will not purchase an ebook if an ebook copy was already purchased on a different platform.			
1	# of titles used vs. cost to access those titles	Annual cost per used title.				
1	Usage stats for most-used titles	Actual numbers for usage (rather than ranking). Whether titles that have high use among EBA titles are actually high use compared to other resources				
1	Course reserves usage	Relevance of EBA content to curriculum; Titles that would have a significant impact if we lost access;				
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Sid Devarenne:

Then, we articulated what we would learn from each of these data points and how they could be used to inform decision-making.

Priority	Data point	What does this tell us?	How would this information impact decision-making?	Data Source(s)	Data collection steps; Calculations	Difficulty/Estimated time commitment
1	Orbis Cascade Alliance holdings	How quickly patrons could obtain a print copy of the title through consortial lending.	Turnaround on Summit requests is 2-3 days and the loan period is 6-12 weeks. Depending on the demand/need for a title, high availability through Summit could			
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1	# of titles used vs. cost to access those titles	Annual cost per used title.				
1	Usage stats for most-used titles	Actual numbers for usage (rather than ranking). Whether titles that have high use among EBA titles are actually high use compared to other resources				
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Sid Devarenne:

To help scope and plan the project, we included information about data collection.

Priority	Data point	What does this tell us?	How would this information impact decision-making?	Data Source(s)	Data collection steps; Calculations	Difficulty/Estimated time commitment
1	Orbis Cascade Alliance holdings	How quickly patrons could obtain a print copy of the title through consortial lending.	Turnaround on Summit requests is 2-3 days and the loan period is 6-12 weeks. Depending on the demand/need for a title, high availability through Summit could			
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Sid Devarenne:

Finally, at the beginning of each of the two evaluations, we reviewed this table and assigned priorities to different data points.

Data Collection			
Data point	Source	Person Responsible	Status
EBA title usage report	EBA usage report from vendor site		In-progress
FY25 EBA price	Vendor representative		
EBA title list	Vendor admin site		In-progress
Course reserves usage	Course reserves database		Complete
Summary of other ebook usage	COUNTER reports		
Electronic and physical overlap	Alma Overlap and Collection Analysis		
Consortial holdings	Ex Libris SRU		

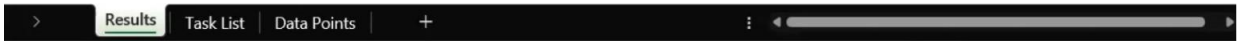
Data Analysis			
Data point	Calculation/Procedure	Person Responsible	Status
Cost per title used	Annual cost / # of titles with usage		
Percent of titles used	# of titles with usage / Total # of titles		
E-book usage benchmarks	Calculate distribution of usage among titles within other ebook packages		



Sid Devarenne:

We used this Task List tab while conducting the assessment to divide up the work and track the status of different parts of the project.

Data point	Description	Value
Annual cost for upcoming fiscal year		
Total # of titles		
# of titles used in previous academic year	# of titles from EBA with non-zero usage	
Cost per title	Annual cost (FY24) / Total # of titles	
Cost per title used	Annual cost (FY24) / # of titles with usage	
Percent of titles used	# of titles with usage / Total # of titles	
# of titles with e-overlap		
# of titles with physical overlap		
Titles used on Course Reserves in previous academic year		
Titles with fewer than 8 print copies available through Orbis Cascade Alliance		
Titles with fewer than 4 print copies available through Orbis Cascade Alliance		

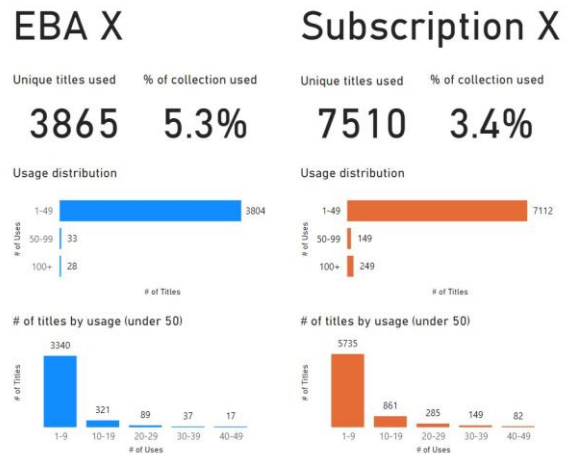


Sid Devarenne:

In the Results tab, we made a table to record our final numbers. This table was also part of our deliverables to the Scholarly Resources Group.

Contextualizing EBA usage

- Original process evaluated EBA programs individually.
- Our other review processes look at resources in comparison to each other.
- Usage statistics are more meaningful in context.



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Sid Devarenne:

Our other deliverable was a summary of usage of our three largest subscription ebook packages.

As mentioned earlier, prior to this project the EBA programs were informally evaluated in isolation at the time their contracts expired. This meant that the decision to extend the programs had to be made without any benchmarks or other context to help us interpret our data. That is a significant difference from Western's other subscription and firm order assessment procedures. For example, our existing subscription review process specifically investigates how our individual subscriptions measure up against each other.

We wanted to provide information that would help us think about the role of EBA programs in our ebook collections as a whole. To accomplish this, we prepared this summary of ebook package use, including the number of unique titles used in the previous year, and the distribution of usage among those titles.

Now Braith will talk about the outcomes of this assessment.

EBA decision making

- Reflections
 - Laid the groundwork for a higher-level conversation about EBAs.
 - Makes it easier to compare products.
- Challenges/areas for future improvement.
 - Lining up expiration/extension timelines for decision making.
 - Still hard to make cancelation decisions.
 - Still evaluating the EBAs in isolation from the rest of our e-books.

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Braith Birchhall:

While decision-makers expressed gratitude for the program level analysis, it is unclear how much impact the new assessment had on extension decisions. So far, we have only been able to provide this data for one extension decision for each program. In both cases the extension was approved.

The data makes it easier to compare our two EBA programs. However, extension decisions are currently made at opposite ends of the fiscal year. A concern is that immediacy will be more motivating than assessment data. This, combined with the budget constraints that most universities are facing, make it important that expiration dates align with each other and the fiscal cycle. We recently negotiated a shorter contract to accomplish this.

Should ceasing to extend one of our EBA programs become necessary, we anticipate the assessment data to be helpful in explaining that decision to stakeholders. We will continue reflecting on how we might integrate this assessment into broader considerations of our collection.

Thank you!

Our EBA assessment template is shared on the conference platform.

Please reach out to us at **Library.collections@wwu.edu**.

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Braith Birchhall:

Thank you so much for watching our presentation! We hope this has been helpful. If you would like to reach out, we would be happy to hear from you at library.collections@wwu.edu. The template for the EBA assessment spreadsheet we use and demoed in the presentation is available on the conference platform. Thank you and have a lovely day.

Birchhall, B., Devarenne, S., & Wegmann, M. (2024, October 15-17). *Evidence based assessment of Evidence Based Acquisitions* [Conference presentation]. NASIG Autumn, virtual.