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Managing the Changing Climate of Business Collections

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Abstract

Librarians that support business programs are weathering competing priorities in business collection management. When making decisions to cut and add new databases, we must assess the value of a given resource by considering a variety of quantitative metrics such as usage, cost per use, cost per citation, and pricing history. In addition, qualitative criteria are increasingly important when making decisions. These criteria include, but are not limited to, content coverage, accessibility, and whether a resource can be provided in a way that supports the principles of critical librarianship.

This Lively Lunch discussion provided three brief presentations, which discussed (1) how value is determined for existing resources using metrics that are useful for holistic collection analysis and individual resource analysis (Macy), (2) critical librarianship and the selection of new business resources (Howard), and (3) managing accessibility requirements with business resources (Vaaler).

Following the presentations, the librarians and vendors engaged in conversation in regard to evaluating business resources and making collection decisions.

Proceedings

Introduction

Librarians that support business programs are weathering competing priorities in business collection management that are driven by requests from faculty and students, increasing resource costs with limited budgets, institutional and state requirements for accessibility, and the desire to support social justice. *Library Journal* has projected a 6% increase in the price of journal content (Bosch, Albee, & Henderson, 2018). Available data from the Association of Research Libraries (2016) indicate that the five-year compound annual growth rate of collection budgets is 3%, a significant gap in light of the fact that 52.7% of academic library budgets are used to purchase electronic materials (Almanac, 2018). These larger academic trends are affecting the work of academic business librarians as they make decisions on which serial content to purchase, whether it be a journal or business database. Librarians are walking a tightrope when managing business collections, balancing changing collection budgets with the need to purchase data, databases, and other resources that are often proprietary in order to support the research and learning needs of their patrons. The presenters of this session desired to create a dialogue about these competing issues in managing business resources. During this Lively Lunch

discussion, three brief presentations provided context in order to spur conversation. This paper summarizes those presentations, as well as key points made during the proceeding's lively discussion.

Determining Value through Collection Assessment—Katharine V. Macy

As I manage the business collection at IUPUI I have a primary goal that I want to accomplish, as well as actions I want to avoid taking. I want to be able to determine the value of a resource within the context of my own library's collections as well as my users' needs. This enables me to fill gaps, cancel unused resources, and plan upfront and honest conversations with vendors based on quantitative and qualitative data. As I manage our business collections I want to avoid the following:

- Purchasing duplicate content,
- Cancelling resources that are used because of budget stagnation or cuts,
- Rushing decisions, and
- Buying resources that are one-off decisions, that is, only used by the requester but won't likely be used by the greater patron population.

In order to achieve my goal of managing my collection efficiently, I have to start by considering user needs through conducting a stakeholder analysis of faculty and students. I gather data on faculty needs by looking at their recent publications, having conversations, and periodically surveying groups of faculty. Surveying a select group of faculty about a small selection of resources often spurs conversation and has proven effective for learning what resources faculty prefer for research and teaching. For students, I analyze syllabi and signature assignments to understand their information needs.

This user needs analysis allows me to look deeper as I conduct a holistic analysis of the business collection. There are six key metrics I currently track:

1. Price History—Using the past six years of price data (if available), I calculate the average annual price increase over a three- and five-year interval.

2. Use—This measures how often the source was clicked, downloaded, and/or read. This statistic can vary widely as to how it's defined from one business database to another and isn't always available. When it's not available it creates a challenge since I must work harder to make the case to maintain the subscription using other data points.

3. Cost per Use—I attempt to create a comparable quantitative value using price and use data. However, on its own this metric proves problematic, especially since definitions of use are not standardized across all business databases. This number does not provide the whole picture.

4. Core Resource—This is a qualitative metric that I assess. I determine if a resource is critical for a teaching or research activity for the business school. I also evaluate if there are other options available that could replace this resource if budget becomes an issue.

5. Content Coverage—I map my content to user needs, looking for areas of duplication within competitive resources and highlighting unique content.

6. Portion of Spend—This metric uses the most recent price to determine what portion a resource contributes to a budget at the collection and library levels.

These six metrics in combination allow me to see the big picture when reviewing my collection, so that I may determine where redundancies and gaps exist. It also helps me set priorities, determine the value a new resource may provide, and prepare for negotiations. There is a seventh metric that I'm working on incorporating for comparing journal content, cost per citation.

I prioritize negotiations for existing resources by applying the Pareto Principle (80/20 rule) to analyze use and/or cost (portion of spend). When using this principle in relation to cost, I determine which resources contribute to the first 80% of the budgeted spend; these resources are flagged for further review. Then I set thresholds for the other metrics, such as flagging resources with an average annual increase greater than 5% over the last three to five years for review. I have developed a template that is available to assist with this analysis at http://hdl.handle.net/1805/12032.

In regard to new resources, I first determine where gaps exist between content and user needs, then I identify options and set up trials. I coordinate with key stakeholders for feedback during the trial, clearly communicating expectations with my stakeholders. My faculty need to understand that we are trying to ascertain the value of different resources, which considers content and cost, so even if a resource is heavily used and liked during the trial, it may not be the one selected.

Overall, this process creates a holistic review of the collection, which provides the context necessary for individual resource review. It has helped me add and expand in areas where gaps existed while maintaining a tight budget. This process has enabled goal setting and supported decision making while I conducted principled negotiations with vendors.

Critical Librarianship & New Resource Selection—Heather A. Howard

Critical studies is getting more and more attention in all areas of librarianship. Emily Drabinski's (2013) *Queering the Catalog* has started many conversations about the structural inequity of our collections and cataloging, and Safiya Noble's (2018) *Algorithms of Oppression* has brought to light the bias in search engines, and possibly other discovery tools. The website Critlib.org provides the following description of critical librarianship:

Critlib is short for "critical librarianship," a movement of library workers dedicated to bringing social justice principles into our work in libraries. We aim to engage in discussion about critical perspectives on library practice. Recognizing that we all work under regimes of white supremacy, capitalism, and a range of structural inequalities, how can our work as librarians intervene in and disrupt those systems?

We seek to understand how we can apply these principles to our selection of new business resources. When thinking about how to evaluate resources, the following questions are useful to consider:

- How was the information acquired?
- Was anyone harmed in the information acquisition process?
- Was anyone left out of the data?
- Who owns the company?
- Are we contributing to harm with our dollars?
- Who will have access? Who won't?

For example, consider the contribution Standard & Poor's, Moody's, and Fitch made to the 2007–2008 financial crisis through inflating their credit ratings for risky loans. We purchase data from these providers, but have we taken steps to see if they are still participating in activities that could be damaging to our nation? Is that our responsibility? Business librarians should also consider large consumer surveys. Librarians can evaluate how the data was collected, the size and makeup of the respondent population, and who might be missing from the sample. One common issue in survey design is treating gender as binary. Additionally, consumer psychographic data are often categorized in ways that are problematic. One very major consumer survey has categories such as Trailer Park City, Very Rich Asians, Sports Utility Families, and Stock Cars and State Parks. It's important to think about what our students are learning by using these resources, and determine what the ethical purchasing decision might be. I don't propose to have the answers to these questions, but rather to discuss these issues and implications during the lively discussion.

Managing Accessibility with Business Resources—Alyson S. Vaaler

In January 2017, Section 508 standards of the Rehabilitation Act of 1973 were updated to reflect the current technology landscape people work within today. These updated standards outline accessibility requirements for technology procured by the federal government for use in its workplaces. Institutions of higher education receive funding from the federal government through grants, direct funding, and other initiatives, which requires that they comply with the updated standards. Since the update, several higher education institutions have faced litigation for failing to adhere to accessibility guidelines in Web content and technologies (Carlson, 2018).

The release of the updated 508 standards has caused universities to take a closer look at the accessibility of their own technology in order to limit their exposure to risk and to provide continued equal access to resources for all students. In libraries, where a large portion of content is delivered via the Web, ensuring the accessibility of technology is especially pertinent.

There are several methods to assess and ensure the accessibility of a product. These methods include providing specific accessibility contract language in a product license, requiring a Voluntary Product Accessibility Template (VPAT), self-assessment tools such as toolbar extensions or Web page checkers, and user testing, either by someone with knowledge of adaptable software or by people with disabilities who use adaptable software. All of these methods and tools can be helpful in confirming the accessibility of a product, but they do not provide black and white answers as to whether a product or Web content is accessible. These tools and methods all require personnel who can interpret the results of testing or documentation and determine if the level of accessibility is acceptable for their own individual institution.

At Texas A&M University, we have started requiring VPATs with every new license or license renewal. If a vendor is unable to provide a VPAT, an exception form can be completed. The exception form operates as a temporary assumption of risk until the product can be assessed more accurately or a replacement can be found. Even with the requirement of VPATS, there are challenges. VPATs are self-disclosing and anyone representing the vendor can fill one out. Some companies hire third parties to fill out their VPATs and have very detailed and thorough descriptions. Other smaller vendors, who may not have much experience with VPATs, offer less descriptive VPATs that don't provide as much information about the accessibility of their product. There currently are no formalized expectations of a VPAT. It is up to the

librarian or person procuring the resource to decide if the information contained in the VPAT is sufficient enough to ensure the accessibility of the resource.

Evaluating Accessibility: Challenges

There are several challenges in evaluating the accessibility of a library resource. One challenge is that a library has to have a designated person available who can interpret how well a resource works with adaptable software or determine if the VPAT or contract language is suitable. Often, especially in smaller institutions, there might not be anyone who has deep knowledge of adaptable software or has the time and resources necessary to test new databases or products for accessibility. In a larger institution, it may not be feasible to individually run accessibility tests on the sheer number of products available to library patrons. Also, if problems are detected, the institution has to determine how big the problem is and if it severely impacts the accessibility of a resource. A resource is not simply accessible or not accessible; there are often different degrees of accessibility present. Determining where the thresholds are for these different degrees of accessibility is difficult and likely different for each institution.

Business library resources present additional challenges to accessibility. Often, business library resources are industry products that are not created with the academic market in mind. Conversely, academic vendors incorporate accessibility when they are developing new products because they have to adhere to accessibility requirements in order to sell their products to higher education institutions. The main customer base for business library resources are commercial clients, not higher education institutions. Thus, when business resources are created, meeting accessibility requirements is not forefront in the development process unlike academic products. This also means that there is little incentive to invest in accessibility, as losing academic libraries as a customer will not have a major impact on sales.

Although there are challenges associated with ensuring the accessibility of library resources, it is an important aspect of evaluating and assessing collections. Being aware of these challenges can help librarians communicate different aspects of accessibility requirements to both vendors and users of the product.

Lively Discussion

Following the three presentations, the speakers facilitated a discussion with the audience. The three presentations spurred conversation in regard to collection assessment, critical librarianship, and accessibility.

In regard to collection assessment, the problematic use of the metric cost per use was discussed. The audience commented that if use data is available, it is not always reliable. Business resource usage statistics are not standardized, unlike traditional scholarly journals that can be measured with COUNTER reports. This can lead to difficulty in ascertaining what can be considered use, which may lead to some double counting metrics, inflating use numbers. The unreliableness of the use metric is what led the first presenter today to incorporate additional quantitative and qualitative metrics in collection assessment. The methodology presented in regard to collection assessment is based on a methodology the speaker used in private industry when working to prioritize negotiations with customers that had low profitability. The audience was enthusiastic in regard to the template provided as a way to track price history and set priorities.

Concerns about bias and stereotypes in business resources as a topic of critical librarianship were front and center in the discussion. The audience expressed disbelief in regard to the problematic categorization that some business databases use when communicating psychographic profiles as they can lead to perpetuating harmful stereotypes. Many felt it was important that we start having this conversation with our colleagues as we make collection management decisions. An audience member brought up the work being done by Reidsma (2016) at Grand Valley State University on algorithmic bias in library discovery systems, which leverages the work of Noble (2018). The audience felt that it was important to promote diverse points of view in database development. One challenge many audience members face is integrating critical librarianship into one-shot instruction sessions with business classes.

There was large concern about accessibility in regard to library-created resources and guides in light of the court decision faced by the University of California at Berkeley (Straumsheim, 2017). As a result, many libraries are auditing their LibGuides as well as other created resources including PDFs and online teaching

modules. Concerns were raised that many business database publishers are not required to follow accessibility law because their core product is not intended for an educational audience. As a result, while VPATs and VPAT audits may bring attention to accessibility needs, it may not be enough incentive to bring about change. However, business databases designed for education can be more responsive. For instance, Amy Braun from Gale spoke to how their resources are currently being designed with accessibility in mind. Another point was made around how both the database interface and the information products database need to be designed for accessibility. For instance, journal databases with PDF articles should have their PDFs designed to be read by screen readers. This particular issue may be more of a problem for older scanned content.

Conclusion

The purchasing process for business information resources is complex and has sometimes conflicting goals. These presentations and the subsequent discussion created a dialogue in regard to three important topics in collection management affecting business librarians today, communicating concerns and gaining perspectives from vendors and librarians present.

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