

Finding the recipe for success: Streamlining a journals collection

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NAG Collection Development seminar

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What ingredients did we start with?

- Newman University
- 2500FTE students
- Formed in the 1960s
- Catholic foundation
- Teacher training roots
- Single campus and library



What ingredients did we start with?

- 150 individual journal subscriptions breaking down into:
 - 76 print subs / 20 online / 54 print and online
- Additional 63 subscriptions tied into two big deal packages
 - Sage Premier
 - Taylor & Francis SSH collection
- EBSCO subscription agent
- Capita's Alto library management system

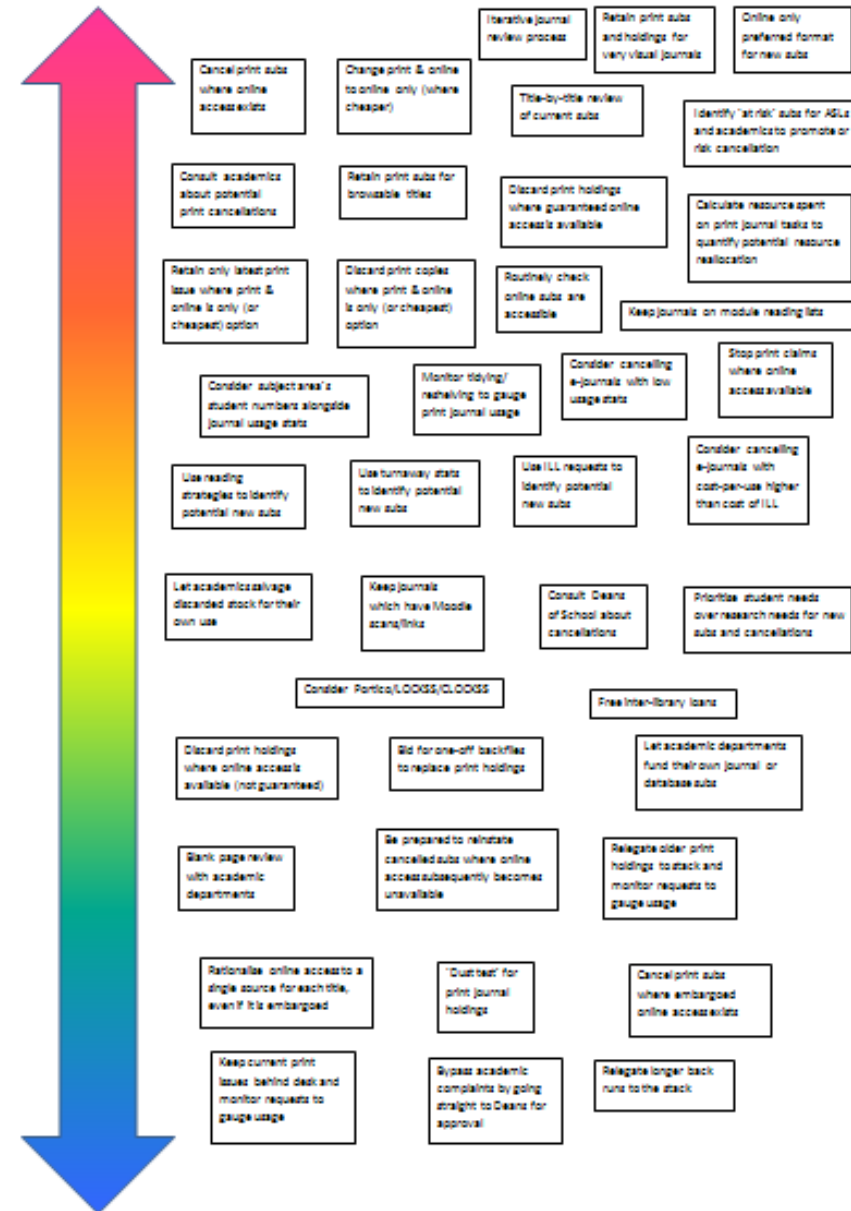
- Previously tinkered with cancellations by asking academics to tick lists of subscriptions they wanted to retain
- Not very satisfactory as they weren't supplying qualitative data and no incentive to rationalise
- Data – what data? Only for online usage
- No strategy in place
- Print and e were historically dealt with by separate teams
- Taking on new subs and upgrading to hybrid subs without any systematic consideration of obsolete subs
- Historical processes – legacy spread sheets in abundance

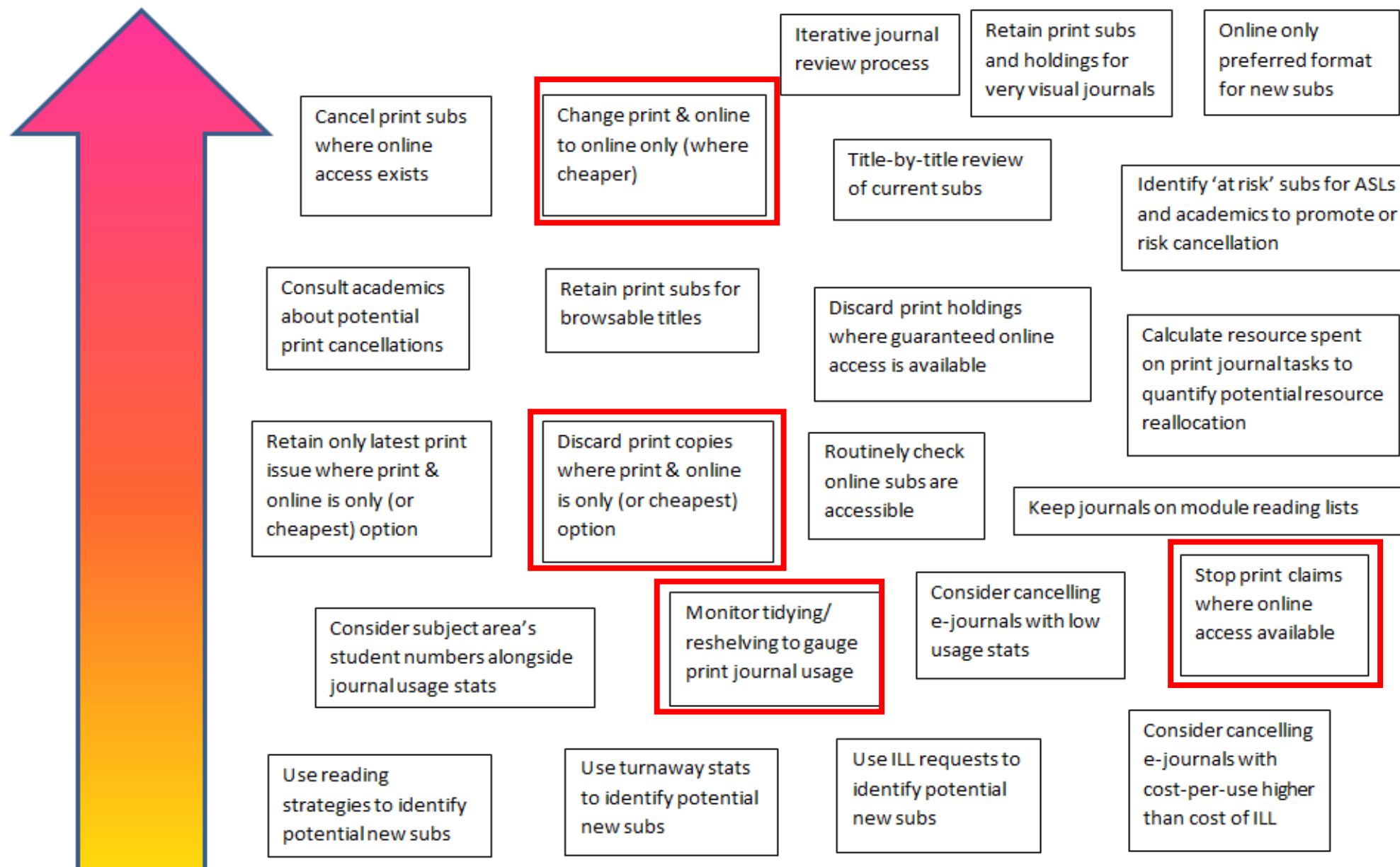
How were we going to approach our journal review?

- Able to make use of kindness and expertise of colleagues from other MUAL libraries (BCU and UCB)
- Literature review
- Spent some time working out our priorities
- Drivers
 - Streamlining required in the management and administration of print journals
 - Focus on integrating e-journal support rather than print
 - Initially no pressures beyond cost-neutral
 - Not driven by space pressures

We know we want a dessert – how did we choose trifle?

- To work out our priorities we put together a hot / cold diagram
- Discussed these ideas and then ranked them for review with the management team
- We had been fairly accurate in terms of the initial appetite for different approaches







Way forward with the journal review emerged following our initial meeting with library management team in early 2017:

Aim to move from print and print and online to online only and to cancel titles in one process...

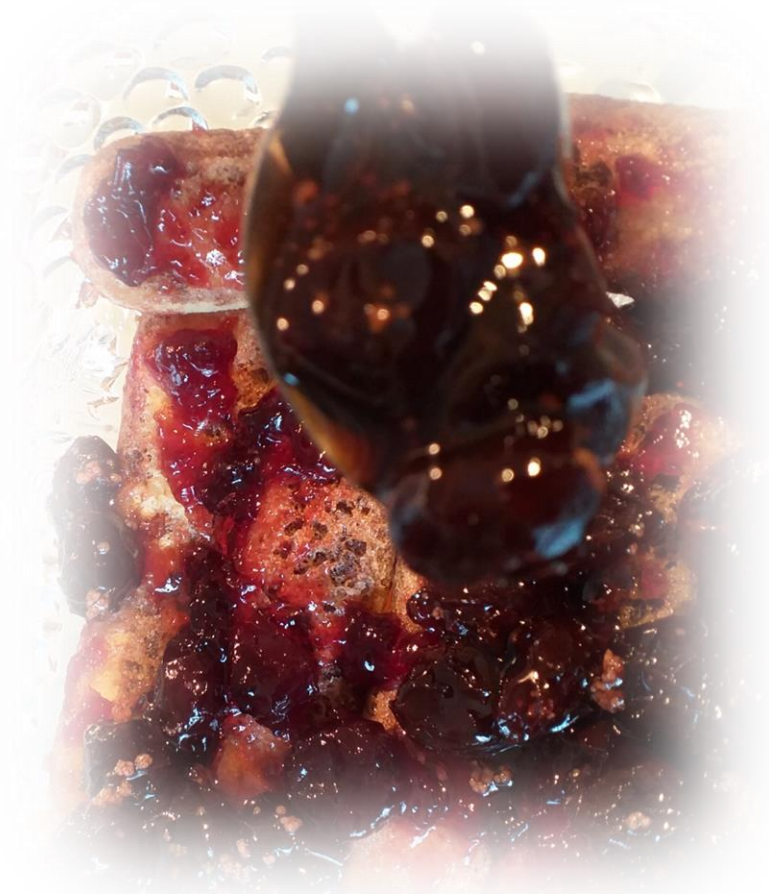
However we later moved to:

- Phase 1 – Move to online only – to complete for 2018 renewals
 - Needed cost data on all print and print and e subscriptions
 - Print journal monitoring already started but continued...
- Phase 2: Cancellations informed by usage

Print monitoring – how did we do it?

- Users return print journals to labelled trolleys rather than re-shelving themselves
- We recorded titles, volume, issue and year
- Recorded on a spread sheet
- Posters and labelled trolleys – not publicised in any other way
- Not flagged as a “use it or lose it” exercise

Results were surprisingly interesting – which was why we continued for five months...



Usage statistics

Crash course in usage statistics from

- E-resource colleague
- JUSP webinars

Iterative process...

- 3 years of JR1 statistics
- Direct and intermediary separated – CPU based on direct only
- Initially also used JR1a for archive usage, but later abandoned this
- Changed focus of e-resource and e-journal statistics to a “mash-up” rather than separate publisher based storage



What were the results?

After Phase 1

- 60% of print or print and online subscriptions moved to online only
- So 60% fewer going through print check-in and claims process
- Moved to online with a slight saving – did not move online where significant cost involved

After Phase 2

- 15% cancelled
- Initially looking for zero inflation on journals budget but made 19% cost savings

Wobbles

- Move to online phenomenally time consuming for staff initially
Focus on end result!
- Steep learning curve for staff who hadn't undertaken some of these processes
No quick fix here – training, hand-holding and engagement for staff involved
- Having started with blue sky thinking in Phase 1 it was hard to pin down decision making
For phase 2 presented five potential options to focus decision making process
- Usage stats not available for some (smaller) publishers
Unresolved issue – had to use subject area growth/reduction to make initial decisions for these titles
- Consultation with stakeholders
Originally planned to consult – but we barely communicated it

What is the cherry on top?

- Getting better results than we had initially planned on
- Allowed staff to be reallocated to other tasks
 - combined acquisitions books and journals into one post
 - checking e-journal access
- At some point we can discard back runs of print...
- We allowed the process to evolve so we were able to respond to our changing environment...



Where next?

- Have put in place a more robust annual review process
- Increasing volume of data as more subs move online!
- Tasks / procedures documented
- Greater staff confidence and skill set

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