**Managing Database Trials listserv responses August 24, 2016**

1. Hello Erin, at the University of Colorado Colorado Springs we handle trials a bit differently and we’ve experimented.  What we are doing right now is to run a trial any time that a library faculty requests it, the subject liaison typically receive requests from campus faculty.  My first step is to request pricing and if it is way out of our price range will might not even trial.  We will run trials between September-November and January-May.  Unless we believe the impacted campus folks will be around we try to avoid holiday and summer breaks.  We run trials for a month minimum and sometimes longer depending on the situation.   At one point we limited to 3 trials at a time and since we said that it really hasn’t been an issue, they’ve been staggered enough not to be a problem.  If a vendor contacts us asking us to run a trial I seek feedback from those within the library who I think might be interested to see if we are really interested.  We send out an email to the library to announce the trial start so they can inform the impacted department faculty.  For internal library use I include pricing and pertinent resource details so they can consider the implications of a subscription/purchase while the trial is running.  I send out an email the week before the trial is over to remind people to review the resource and collect feedback from their department faculty.  I then collate the trial feedback and we typically discuss at a librarian meeting whether we would like to place the item on our electronic resources wish list.  I keep the feedback in a trial database so that we will remember what and when we trialed, what the costs were, what feedback was received, and what our decision was in terms of moving forward after the trial.  I refer to this documentation quite a bit.I think it works well to centrally coordinate the trials so that messages and details going out are consistent.  We do not necessarily have limitations on what gets trialed.  If it is some kind of internal tool for library folks, we will not share the trial link outside the library.  Asking for pricing first helps us only trial resources that may be feasible for us to actually add to our collection.  Not sure if this is the type of feedback you are hoping to receive.  Let me know any questions!

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1. I work in a similar environment, and given our budget constraints, I typically only trial something for which I can conceivably find funds for, and typically not until. I feel that I erode my credibility with faculty to trial a database, get them all enthused about it and then have to say “glad you liked it, sorry we don’t have the funds for it.” If there is a different database that is less effective, than the new one under consideration, then I sometimes do a “head-to-head” trial and get feedback and keep the best of the two.

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1. That's a lot of trials to be managing at once! At my current position (small private university), we only trial resources that we might actually purchase. This keeps us down to only 2-4 trials/year. Our budget is pretty tight right now, so maybe we'll watch a video or webinar to see how interested we'd be in something, then we'll look at the pricing and if it's something that we can't afford at the moment, why bother trialing it?

Best, Sara

1. Most institutions where I have worked have had stable or shrinking budgets; therefore, we limited our trials to resources that might realistically be considered for future acquisition within our anticipated budget.  We would even entertain trials to resources that are on our wish list, but we drew the line before amassing too many trials or exploring resources that are completely unrealistic without huge budget increases.  This helps to resolve the problem of having too many trials running simultaneously, but it also avoids providing false hope to those who feel that a trial means a possible or likely acquisition pending positive user responses.  Many faculty are reticent to trial a product that absolutely can’t be added to the collection. In addition, I have always accommodated requests for trials throughout the year, but early spring and fall are typically popular choices.  Although that makes certain months busier, trials are often requested to coincide with specific assignments that can truly test how useful the resource will be in a realistic research environment.  For example, an October trial won’t receive as much usage or as positive feedback if the resource was intended to assist with a project that was due in late September. Lastly, we generally don’t encourage faculty to manage their own trials, although it has happened in the past.  We typically don’t hear their feedback about the trial when they manage it, and we may not even know that it is taking place.  If the library will be paying for the subscription, it makes sense for us to get the ball rolling by obtaining details concerning cost, licensing, and user feedback. Obviously different practices work well in different settings, but perhaps this will give you some other options to think about.

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1. We run trials anytime, though we try to avoid super busy times in the semester, or during the summer when the campus is quiet.  Our problem is that our trials may not get enough attention, or faculty will ask for something, then not respond to our feedback inquiries. I manage the trials and  keep a ‘wish list’ going, and we review and prioritize near the end of the fiscal year.  One time purchases are preferred if we can afford it. –Jennifer
2. We only try to trial what we think we can get. We don’t want to trial something and the faculty member thinks they are going to get in and then we have to come back and say we can’t afford it. So before we do a trial, we need to know how much it will cost, be it purchase or subscription.

Jamane

1. At Illinois Wesleyan, we do much the same as both Kalamazoo and Trinity -- only run "serious" trails that can be funded.  Librarians review and prioritize databases etc. annually, unless the product is for one department that has agreed to cancel a subscription in exchange for a new resource -- then the liaison librarian makes the decision with the department/program.  All trials are *supposed* to be managed by the collections librarian, not the teaching faculty.

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1. At Virginia Tech we assembled a Trials Work Flow Team. Our four person team consists of someone from Acquisitions, Assessment, Collection Management and ERM. Faculty or anyone requesting a trial must fill out a trials request form (google form) with the pertinent information about the database. We use Trello to keep track of each trial.  Once the trial has ended, we review the survey responses associated with each trial, any usage stats, and comments from the requestor prior to declining or purchasing the database. This is the abbreviated process, we meet once a week during "trial season" which runs Sept-Nov and Jan-March and manage 10+ trails a semester.  -Tracy.
2. We don’t have a formal policy per sé but rather a set of expectations. Here are the elements:
* We only run database trials once a year, in a set timeframe of the academic year that’s most conducive to obtaining good use and feedback
* Subject librarians cannot request a subscription to or purchase of a database without first requesting a trial (assuming that trials are available — sometimes they aren’t, so there are exceptions)
* Every request for a new database must be accompanied by a detailed rationale
* Subject librarians are expected to request a trial for a database only after a preliminary review of suitability, content, etc.
* All database trials are public, meaning, we advertise their availability to all faculty and students and we request feedback from them and take their feedback (or lack thereof) as a major factor in making a decision to purchase or subscribe
* All trials are initiated/run by me

In terms of the financial feasibility question, our thinking is to focus on the content first, and if it feels a justified need to support areas of our curriculum, we’ll try to figure out how we can afford a database. Of course, there are times when a particular database is so off the charts expensive that it is extremely unlikely we’ll ever obtain it. But there are times when we might seek additional funding in order to be able to afford a particular database. I hope this helps.
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10. We run trials any time of the year, even in summer. Faculty can request trials, but usually they will ask a librarian about a trial and then the librarian sets it up. We have a Trial Databases LibGuide that lists all of our current trials. I am responsible for putting them there, and sometimes I forget they are there, or nobody tells me the trial is over or that we purchased it. I think that sometimes there is a chance we will purchase it (SimplyMap), and sometimes there is no chance we will purchase it (Science). I think our librarians like to get trials for some reason. Here's the LibGuide page in case you're interested: <http://guides.acu.edu/trialdatabases>

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