ONLINE COLLECTION EVALUATION RUBRIC

COLLECTION MANAGEMENT/DEVELOPMENT POLICY

The Eastern Kentucky University Libraries Online Collection Evaluation Rubric is a valuable tool that ensures the continued excellence and relevance of our library's online resources. The rubric is informed by our overall Collection Management Policy, which outlines our commitment to maintaining a dynamic and comprehensive collection that supports the research, learning, and information needs of our patrons. By aligning our evaluation practices with our collection management goals, we can ensure that the library's resources align with the university's values and objectives, providing a diverse, accessible, and effective collection that supports the educational and research endeavors of the EKU community.

EVALUATION CRITERIA

The EKU Libraries Collections & Discovery Division, in collaboration with the Collection Development Committee, assesses online resource subscriptions and renewals. These evaluations consider multiple factors, but are anchored in **Curriculum Alignment & University Enrichment**. This pivotal aspect governs the weight and consideration given to the remaining three criteria—**User Experience**, **Cost Effectiveness**, and **Resource Management**. The extent to which a resource aligns with the existing campus curriculum, faculty research needs, and supports the intellectual vitality of the university, determines the depth of evaluation across the three remaining dimensions.

Curriculum Alignment & University Enrichment

This section sets the tone for our assessment, **governing how we weigh and prioritize the other criteria**, making it foundational to our evaluation process. Curriculum Alignment & University Enrichment strives to balance the need for both highly specialized resources, general multidisciplinary databases, and **the enrichment of the university as a whole**. It takes a comprehensive look at the collection ensuring that university information needs are adequately supported, while minimizing duplication of content by examining the subject coverage and the extent to which a resource supports an information need; the degree to which a resource is **essential** for the university or the program(s) it supports; and the degree to which a resource is **relevant** for multiple programs at the university.

User Experience

This section evaluates the **quality of a resource's interface**, encompassing aspects such as basic and advanced search functionalities, the ability to refine search results, access to permalinks, options to create and export citations, personalized account features, consistency with library branding, and additional qualifiers **tailored to the type of resource**. Moreover, this section evaluates a resource's accessibility features, ensuring a user-friendly experience for individuals with diverse needs and disabilities. While adherence to accessibility standards is covered in the dealbreakers section, this section focuses on the specific features that promote inclusivity.

Cost Effectiveness

The **number of times a resource was used in an evaluation period**, with consideration given to cost and its annual price inflation, type of access, resource type, and compliance with COUNTER codes of practice regarding usage statistics. These metrics are based on established industry benchmarks, studies on user behavior and cost analysis, and library resource usage patterns, ensuring that our evaluation criteria are not only comprehensive but also rooted in concrete data.

Resource Management

This section assesses the **ease of managing a particular resource**, including compatibility with the library's integrated library system, proxy/authentication server, and discovery layer. Additionally, it **examines the responsiveness of the vendor** in addressing inquiries, resolving problems, and their willingness to engage in discussions regarding licensing agreements. This section aims to foster a positive and productive partnership between the vendor and the university.

DEALBREAKERS

Certain factors hold critical importance and are considered deal breakers in evaluating the suitability of academic resources. These factors directly impact the accessibility and usability of a resource for our academic community. Deal breakers include:

Off-Campus Access

Ensuring seamless and secure access to resources for off-campus users is a paramount concern. Access through a proxy server or other authentication services is vital to accommodate remote learning and research needs. Any resource that relies solely on password access, which may hinder accessibility and frustrate users, is not considered acceptable.

WCAG Compliance

Accessibility is a fundamental aspect of inclusive education and research. To this end, the adherence to Web Content Accessibility Guidelines (WCAG) 2.0 Level AA compliance or higher is crucial. Resources that do not provide a Voluntary Product Accessibility Template (VPAT) or other documented proof of adherence to these accessibility standards may compromise the ability of diverse users, including those with disabilities, to benefit from the resource effectively.

These deal breakers represent **non-negotiable criteria in our evaluation process**, as they directly impact the accessibility, usability, and inclusivity of academic resources for our campus community.

SCORECARD

The following sections outline the approach and primary questions that the library uses to evaluate resources. Additional methods may be considered, depending on the specific resource.

Resource Information

NAME		**RENEWAL DATE**	
VENDOR		**RENEWAL COST**	
RESOURCE TYPE		**REQUESTED BY**	
ACQ. DATE		**INFO. NEED**	

Curriculum Alignment & University Enrichment (up to 20 points)

This section sets the tone for our assessment, **governing how we weigh and prioritize the other criteria**, making it foundational to our evaluation process. Curriculum Alignment & University Enrichment strives to balance the need for both highly specialized resources, general multidisciplinary databases, and **the enrichment of the university as a whole**. It takes a comprehensive look at the collection ensuring that university information needs are adequately supported, while minimizing duplication of content by examining the subject coverage and the extent to which a resource supports an information need; the degree to which a resource is **essential** for the university or the program(s) it supports; and the degree to which a resource is **relevant** for multiple programs at the university.

1. Does this resource fill an information need on campus?

4 STRONG ALIGNMENT	2 MODERATE ALIGNMENT	0 LOW/NO ALIGNMENT
The resource is clearly connected to a particular academic program(s) or research initiative happening on campus. The resource supports EKU research and/or teaching.	The resource supports EKU research and/or teaching.	The resource does not support or no longer supports EKU research and/or teaching.

2. Is this resource unique in that no other resource meets similar campus information needs?

4 STRONG UNIQUENESS	3 SIGNIFICANT UNIQUENESS	2 MODERATE UNIQUENESS	1 LOW UNIQUENESS	0 NO UNIQUENESS
The information contained in this resource is entirely unique and cannot be found elsewhere.	A small degree of overlap exists with this resource and another subscribed resource or stable Open Access resource. The resource has value-added features which are meaningful to users.	A portion of this resource's content or indexing is available elsewhere. The resource offers additional features which are helpful to users.	A good deal of the content and indexing overlaps with another resource and value-added features are minimal.	Faculty and students could find the same information in another subscribed resource or stable Open Access resource.

3. Are these resources considered essential and/or relevant for degree programs? Does this resource support explicit research/teaching needs of the faculty in these programs?

4 ESSENTIAL	2 RELEVANT	0 MINIMAL/NO RELEVANCE
Faculty and librarians actively promote the use of this resource, considering it indispensable for academic pursuits. Faculty integrate it into their research and teaching.	Faculty and librarians may promote the use of this resource, and it holds relevance to a significant number of faculty members. Faculty use it to supplement research or teaching needs.	Faculty and librarians do not actively promote the use of this resource. It is not considered a significant tool for research or teaching, with only occasional or past usage by a few faculty members.

4. What percentage of degrees awarded (Kentucky Degrees and Credentials Report) does the resource support?

4 STRONG SUPPORT	3 SIGNIFICANT SUPPORT	2 MODERATE SUPPORT	1 LOW SUPPORT
41% and greater	40 — 21%	20 — 6%	5 — 0%

5. Does this resource support the enrichment of the university?

4 SUPPORTS ENRICHMENT	0 DOES NOT SUPPORT ENRICHMENT
The resource actively contributes to the enrichment of the university, fostering intellectual vitality or aligning with the university's stewardship of place.	The resource does not or no longer supports intellectual vitality or the university's stewardship of place.

User Experience (up to 10 points)

This section evaluates the **quality of a resource's interface**, encompassing aspects such as basic and advanced search functionalities, the ability to refine search results, access to permalinks, options to create and export citations, personalized account features, consistency with library branding, and additional qualifiers **tailored to the type of resource**. Moreover, this section evaluates a resource's accessibility features, ensuring a user-friendly experience for individuals with diverse needs and disabilities. While adherence to accessibility standards is covered in the dealbreakers section, this section focuses on the specific features that promote inclusivity.

1. Does the resource have an advanced search feature?
    a. Yes **(1 point)**
    b. No **(0 points)**

2. Can you refine search results with facets?
    a. Yes **(1 point)**
    b. No **(0 points)**

3. Does the resource offer permalinks for search results?
    a. Yes **(1 point)**
    b. No **(0 points)**

4. Is it possible to create and export citations?
    a. Yes **(1 point)**
    b. No **(0 points)**

5. Does the resource allow for the creation of personal accounts?
    a. Yes **(1 point)**
    b. No **(0 points)**

6. Can you apply library branding to the resource?
    a. Yes **(1 point)**
    b. No **(0 points)**

7. Format Specific User Experience Criteria. **For questions a — f, answer ONE question based on the product resource type:**
    a. Does the **database** have the following features and/or functionality? **(1 point for each for a total of 4 points)**
        i. Download full-text content
        ii. Full-text content delivered in multiple formats (e.g., PDF, HTML)
        iii. Configure link resolver to connect to full-text content in other resources
        iv. Ability to print, save, and email results during session

    b. Does the **data and statistics** collection have the following features and/or functionality? **(1 point for each for a total of 4 points)**
        i. Download full-text content
        ii. Full-text content delivered in multiple formats (e.g., CSV, SPSS, SAS)
        iii. Documentation provided to understand study methodology and variables
        iv. Online data analysis and/or visualization tools

    c. Does the **digital images** collection have the following features and/or functionality? **(1 point for each for a total of 4 points)**
        i. Download full-text content

ii.   Full-text content delivered in multiple formats (e.g., JPEG, PNG)
iii.   High resolution images (300 dpi or higher)
iv.   Image zoom and pan tools

d. Does the **eBook** package have the following features and/or functionality? **(1 point for each for a total of 4 points)**
     i.   Download full-text content
     ii.   Full-text content delivered in multiple formats (e.g., PDF, EPUB)
     iii.   DRM-free content (meaning no Digital Rights Management restrictions)
     iv.   Ability to read content online

e. Does the **journal** package have the following features and functionality? **(1 point for each for a total of 4 points)**
     i.   Download full-text content
     ii.   Full-text content delivered in multiple formats (e.g., PDF, HTML)
     iii.   Configure link resolver to connect to full-text content in other resources
     iv.   Articles have linked cited references

f. Does the **streaming video** package have the following features and/or functionality? **(1 point for each for a total of 4 points)**
     i.   Embed code to easily add films to CMS and/or course websites
     ii.   Videos have public performance rights
     iii.   Ability to make playlists
     iv.   Ability to trim or clip

Cost Effectiveness (up to 15 points)

The **number of times a resource was used in an evaluation period**, with consideration given to cost and its annual price inflation, type of access, resource type, and compliance with COUNTER codes of practice regarding usage statistics. These metrics are based on established industry benchmarks, studies on user behavior and cost analysis, and library resource usage patterns, ensuring that our evaluation criteria are not only comprehensive but also rooted in concrete data.

1. What is the annual price inflation for the product?

3 MINIMAL/NO PRICE INFLATION	2 LOW ANNUAL PRICE INFLATION	1 MODERATE ANNUAL PRICE INFLATION	0 HIGH ANNUAL PRICE INFLATION
0 — 1%	2 — 3%	4 — 5%	6% and greater

2. What is the cost-per-use for the product? — **For questions a — e, answer ONE question based on the product format type**:

   a. **eJournal or eJournal Package**

   (percentage of journal usage)

6 HIGH COST-EFFECTIVENESS	4 MODERATE COST-EFFECTIVENESS	2 LIMITED COST-EFFECTIVENESS	0 COST-INEFFECTIVE
31% and greater	30% — 20%	19% — 10%	9 — 0%

   (total number of full text downloads)

6 HIGH COST-EFFECTIVENESS	4 MODERATE COST-EFFECTIVENESS	2 LIMITED COST-EFFECTIVENESS	0 COST-INEFFECTIVE
$0 — $14	$15 — $30	$31 — $50	$51 and greater

   b. **eBook or an eBook package** (total number of chapter views)

12 HIGH COST-EFFECTIVENESS	8 MODERATE COST-EFFECTIVENESS	4 LIMITED COST-EFFECTIVENESS	0 COST-INEFFECTIVE
$0 — $14	$15 — $30	$31 — $50	$51 and greater

   c. **Streaming Media or a Streaming Media platform** (total number of views/listens)

12 HIGH COST-EFFECTIVENESS	8 MODERATE COST-EFFECTIVENESS	4 LIMITED COST-EFFECTIVENESS	0 COST-INEFFECTIVE
0 — $4	$5 — $10	$11 — $15	$16 and greater

d. **Database** (total number of full-text downloads, abstract views, and requests out)

12 HIGH COST-EFFECTIVENESS	8 MODERATE COST-EFFECTIVENESS	4 LIMITED COST-EFFECTIVENESS	0 COST-INEFFECTIVE
$0 — $14	$15 — $30	$31 — $50	$51 and greater

e. **Abstracting & Indexing** (total number of abstract views and requests out)*
The point allocation is limited to 9 points due to the lack of full-text content.

9 HIGH COST-EFFECTIVENESS	6 MODERATE COST-EFFECTIVENESS	3 LIMITED COST-EFFECTIVENESS	0 COST-INEFFECTIVE
$0 — $9	$10 — $20	$21 — $35	$36 and greater

Resource Management (up to 8 points)

This section assesses the **ease of managing a particular resource**, including compatibility with the library's integrated library system, proxy/authentication server, and discovery layer. Additionally, it **examines the responsiveness of the vendor** in addressing inquiries, resolving problems, and their willingness to engage in discussions regarding licensing agreements. This section aims to foster a positive and productive partnership between the vendor and the university.

1. Does the vendor provide an online portal to administer the product?
    a. Yes **(1 point)**
    b. No **(0 points)**

2. Does the vendor provide COUNTER-5 usage statistics? Are they available for SUSHI harvesting? If not, are clearly-defined alternative metrics available?
    a. Yes **(1 point)**
    b. No **(0 points)**

3. Does the vendor provide a collection/package ID to simplify backend discovery and setup?
    a. Yes **(1 point)**
    b. No **(0 points)**

4. Is official EZproxy configuration information documented for the resource?
    a. Yes **(1 point)**
    b. No **(0 points)**

5. Does the vendor provide item-level records with quality metadata to the library discovery layer?
    a. Yes **(1 point)**
    b. No **(0 points)**

6. Have technical problems frequently occurred during the past year?
    a. No **(1 point)**
    b. Yes **(0 points)**

7. Does the vendor provide timely and helpful assistance when contacted with questions or technical problems?
    a. Yes **(1 point)**
    b. No **(0 points)**

8. Is there a dedicated customer service representative?
    a. Yes **(1 point)**
    b. No **(0 points)**

Adjusted Weight

Curriculum Alignment & University Enrichment forms the basis of our evaluation process, determining how we prioritize and allocate weight to other criteria. The table below outlines how **User Experience**, **Cost Effectiveness**, and **Resource Management** are weighted based on a resource's performance in Curriculum Alignment & University Enrichment. As a resource's alignment and enrichment performance diminishes, the relative importance of these other areas amplifies, reflecting their heightened significance in compensating for weaknesses in curriculum integration.

Weighting of Evaluation Criteria Based on Performance in Curriculum Alignment and University Enrichment			
Curric. Alignment & Univ. Enrichment Score	**15 points and greater**	**14 — 8 points**	**7 — 0 points**
% of Curric. Alignment & Univ. Enrichment Score	100%	100%	100%
% of User Experience Score	10%	20%	30%
% of Cost Effectiveness Score	10%	20%	30%
% of Resource Management Score	10%	20%	30%

Final Score

This scoring scale helps assess a resource's overall performance and inform decisions regarding its renewal, review, or cancellation. Each criterion receives a score, and the total score determines the corresponding action.

RENEW	REVIEW	CANCEL
17 points and greater	**16 — 8 points**	**7 — 0 points**