OREGON STATE LIBRARY

Statewide Database Licensing Advisory Committee (SDLAC):
A committee of the LSTA Advisory Council
Annual Report: April 2012 to June 2013

Project Name: Statewide Database Licensing Program
Date Submitted: August 20, 2013
Submitted By: Jane Nichols, SDLAC Chair

1. Summarize the overall purpose of the grant project:

A. Scope
The Statewide Database Licensing Advisory Committee (SDLAC) is a committee of the LSTA Advisory Council (which advises the Oregon State Library Board of Trustees). SDLAC's primary responsibility is to advise on the drafting of requests for proposal, to review proposals, recommend database(s) to license, and to advise about the allocation of costs (when necessary) to libraries participating in the Statewide Database Licensing Program. For more information see the Statewide Database Licensing Program at: http://www.oregon.gov/osl/LD/Pages/technology/sdlp/index.aspx.

B. Summary of Currently Licensed Databases

- *Gale Databases*, August 1, 2009 – July 31, 2014: The package of databases provides access to full-text resources covering many topic areas. After the contract was awarded, *GREENR* and *U.S. History in Context*, were added at no additional cost and with the full cost frozen for the three year term.
- *Gale Virtual Reference Library*, August 1, 2009 – July 31, 2014: Provides a small collection (about 30 depending on library type) of electronic reference books.
- *Gale Opposing Viewpoints*, August 1, 2010 – July 31, 2014: Provides pro/con summaries on controversial issues.
- *LearningExpress Library*, November 1, 2010 – October 31, 2015: Provides career and education skill building courses and practice tests.

C. Supports LSTA Five-Year Plan
The Statewide Database Licensing Program supports two goals of the LSTA Five-Year Plan Goal 1: Provide access to information resources and library services and Goal 4: Develop information literacy skills. See the full plan here: http://www.oregon.gov/osl/LD/LSTA/lstaplanfinaljune27.pdf.

2. Summarize the project results to date:

A. Narrative Summary
Gale provides usage statistics for each database. A summary of user sessions by library type is presented along with percent of total usage. Both FY12 and FY13 are presented to show changes in usage over time. Gale adheres to COUNTER statistics "…counts usage regardless of the search method, i.e. Federated Search, PowerSearch,

direct links, etc. Each search submitted through a federated search engine is counted as a session..." (*Usage FAQS* http://bit.ly/12Y2QoB).

At 47% and 49%, OSLIS/K12 Library patrons were the strongest users of the general databases in each fiscal year. Public and Tribal Library patrons were the heaviest users of *Learning Express Library*; their usage grew from 69% to 74% over the two fiscal years. *Learning Express Library* provides support for job hunters, included practice tests, resume help, and more.

B. Outputs Summary: *SDLP Annual Database Usage by Library Type*

Gale Databases

	FY 2012		FY 2013	
Library Type	**Database Sessions†**	**Percent of Total**	**Database Sessions**	**Percent of Total**
Academic	1,309,678	25.4%	915,566	23.7%
Public/Tribal	1,420,266	27.6%	1,051,465	27.2%
OSLIS/K12	2,423,480	47.0%	1,896,445	49.1%
Total	5,153,424	100%	3,863,476	100.0%

Learning Express Library

	FY 2012		FY 2013	
Library Type	**Database Sessions†**	**Percent of Total**	**Database Sessions**	**Percent of Total**
Academic	4,548	13.4%	5,096	13.3%
Public/Tribal	23,518	69.4%	28,502	74.6%
OSLIS/K12	5,822	17.2%	4,591	12.0%
Total	33,888	100.0%	38,189	100.0%

†Gale defines a session as “a cycle of user activities that starts when a user connects to a database and ends by connecting to another database or leaving the service through a logout or timeout due to user inactivity.” (See: http://bit.ly/152ZlCu.)

3. Report on specific project objectives to date:

A. Appropriating Funds
After the contract was awarded to Gale in 2009, cost savings became available. SDLAC polled constituents and based on their input SDLAC recommended the purchase of *Opposing Viewpoints* and *LearningExpress Library* for all libraries.

B. Addressing Academic Library Concerns

SDLAC expressed academic librarians concerns about lack of desired content in the Gale databases to Gale representatives. In addition to adding the *GREENR* and *U.S. History in Context* databases at no additional charge when the contract was renewed in August 2011, Gale pursued journal content rights for just over 1,000 journal titles and added content for acquired rights. Here is a summary.

Action Taken	Journal Titles
Acquired	159
Ceased	24
Contacted	145
Contract Sent	18
Declined	270
Declined; Exclusive	467
Researched	2
Grand Total	1085

C. Improving Transparency

SDLAC promotes transparency by posting meeting minutes on the OSL web site, providing routine communication through Libs-OR, FlashNews, and the new State of Oregon transparency web site and through the use of surveys to secure Oregon librarian input and feedback. Routine communication includes promotion of training opportunities and other support for using the databases and features such as subject-focused resources, sub-collections of Gale's primary databases organized by specific fields of interest such as agriculture, business, etc.

D. Surveys & Survey Findings

SDLAC members distributed two web-based surveys to learn about constituents' content needs, to gather their input throughout the RFP process and to foster transparency. Surveys were conducted January 2012 and March 2013. SDLAC made the surveys available first to constituents and then to the library community at large through Libs-OR and the OASL list. SDLAC used the responses to inform the current RFP. The intent of the first survey, January 2012, was to capture constituent's content needs at a broad level and learn whether respondents felt a single database model still meets the State's needs. The intent of the second survey, March 2013 was to learn how constituents would rank categories of content identified by SDLAC members. The categories were informed by the 2012 survey responses and a ranking exercise done by SDLAC members. Another objective of the March 2013 survey was to gather feedback the database funding model, what would constituents prefer more expensive database(s) where libraries contribute to the cost or less expensive database(s) available to all libraries for free?

There were 119 responses to the 2012 survey and 263 to the 2013 survey. The March 2013 summarized results were shared with constituents and are shown here.

March 2013 Summarized Results

Question 2: Please rank the following categories of resources in order of importance to your library to have available through the Statewide Database Licensing Program. (1 = the most important, 7 = the least important)	
General Periodicals	3.02
Research/Reference Resources	3.54
Career, Job and Computer Skills Resources	4.07
Newspapers	4.10
Contemporary Issues Resources	4.18
Peer Reviewed Journals	4.49
Ebook Collections of Nonfiction Books	4.60
answered question	258

Question 5: Electronic resources vary significantly in cost, and funds available for statewide licensing are limited. If the Committee had to choose, which of the following options would you prefer?		
	Response Percent	Response Count
More expensive database(s) in which your library may need to share in the cost.	39.1%	90
Less expensive database(s) that would be available to all libraries for free.	60.9%	140
Other (please specify)		40
answered question		230
skipped question		35

See Appendix 1 for a complete list of questions.

4. Discuss significant developments:

A. Committee Membership Changes
Arlene Weible from the State Library was assigned to the SDLAC Program in November 2012. Jane Nichols from Oregon State University became Committee Chair in November 2012. Diane Sotak from University of Portland and Brent Mills Hood River joined July 2013 filling Position #8: Academic Library from a Private Academic Institution and Position #9: Resource Sharing Network respectively. Member Glenna Rhodes was re-elected to Position #7: Public Library Serving over 100,000. Member and former Chair Canon Crawford (Position #8) completed his term as did Member Sean Park (Position #9).

B. Federal LSTA Funding and Budget Cuts
State Library staff follows federal budget cuts in Washington, DC and projects available funds in upcoming years.

C. RFP Created and Posted

The Oregon State Library, with the assistance of the Statewide Database Licensing Advisory Committee, issued a Request for Proposal (RFP) 107-2201-13 for Statewide Library Database Packages in June 2013 on the Oregon Procurement Information Network (ORPIN). Proposal submissions are due August 1, 2013.

Since the phrase “General Periodical Database” no longer appears in the Oregon Revised Statutes (ORS) or the Oregon Administrative Rules (OAR) the SDLAC was freed to focus on identifying the best content to meet Oregonians information needs while meeting the ORS requirement. SDLAC reviewed the language of ORS 357.206 (a): To provide matching grants and other assistance to facilitate the statewide licensing of electronic databases for all types of libraries. OAR 543-060-0010 Definitions (8): “Statewide database licensing” means the cooperative contract negotiation and purchase to make collections of electronically stored data, records or full text available to public, school, academic, and tribal libraries in Oregon.

Using survey results from 2012 the SDLAC identified content categories that respondents most wanted. The committee ranked and described the categories and in the March 2013 survey asked constituents to provide their rankings. Results enabled the committee to clearly see the most needed content. The Committee crafted the RFP around these categories. SDLAC also reviewed previous RFPs as well as RFPs from Washington and Idaho to see how they handled diverse content and audience needs. The committee discussed at length, with significant input from the State Procurement Office representatives, how to organize the RFP and ultimately decided to create four categories of database packages:

1) General Periodicals
2) Academic Journals
3) General Reference
4) Contemporary Issues Reference Material

A key structural change from previous RFPs was made: vendors may submit proposals to one or more categories and the State may offer the contract to one or more vendors. No more than one award will be made per category, though one vendor may be awarded more than one category. This flexibility is tempered by cost.

Evaluation includes the awarding of points across two rounds followed by points awarded resulting from a cost scoring and points for multiple category offers. If needed and in the State’s best interests, further rounds of evaluation will be added.

Points Distribution		
	Possible Points	Percent of Total Points
Round 1: Written Proposals	215	31%
Round 2: Vendor Demos & User Review	300	43%
Cost	135	19%
Multiple Category Offer	50	7%
Total	700	100%

Round 1 consists of two parts: a pass/fail review by the State Procurement Office and a scored evaluation of the written proposals by the SDLAC members. Round 2 consists of vendor demonstrations and user review of the top five proposals that received the highest scores in the first round. If there is a natural break in the scores in the first round, the number eligible for the second round may be increased or decreased. SDLAC members or their delegates are eligible to participate in Round 2.

Cost will be evaluated using a mathematical formula. The proposal with the lowest cost proposed will receive the full points for cost. All other proposals will receive a score based on the following formula:

Lowest proposed cost
---------- X Possible Cost Points
Cost proposal being scored

For example three companies (A, B, and C) propose. Company A proposes $100, B proposes $75, and C proposes $50. Company A would receive ½ of the possible points, company B would receive ¾ of the possible points, and company C would receive all possible cost points.

Example Points Distribution for Cost			
	Points possible	**Cost proposed**	**Points earned**
Company A	135	100	68
Company B	135	75	90
Company C	135	50	135

Because administering multiple contracts with different vendors requires greater resources than administering a single contract and because end users prefer to work with a single interface, points will be awarded to proposals responding to more than one category. Up to fifty possible points will be added to the score depending on the number of categories proposed. (One category=0 points; two=10 points, etc.)

Finally, the score for each category will be an average of all of the scores assigned by each evaluator on the evaluation committee and the proposer's final score will be determined by the aggregate of round one, round two, cost and multiple category offering.

5. Discuss future plans:

A. Evaluate Proposals and Submit Recommendation
SDLAC will follow this broad timeline for the procurement of the next statewide database license. Key activities include doing the evaluation of proposals and making a recommendation with the State Procurement Office to LSTA Advisory Council by October 31, 2013.

RFP Timeline 2013-2014

February 12, 2013	SDLAC finish edits on Resource Categories Document
February 19, 2013	Final edited document to DAS Procurement
February 22, 2013	OSL Board Meeting
March-June 2013	RFP developed with State Procurement Office
March 21, 2013	SDLAC Subgroup Meeting with DAS Procurement Staff
April 24, 2013	OSL Board Meeting
April 29, 2013	SDLAC Meeting
May 9-10, 2013	LSTA Council Meeting
May 2013	DOJ (Dept. of Justice) RFP Review
June 13, 2013	RFP posted
June 21, 2013	OSL Board Meeting
August 1, 2013	RFP Proposals due
August 5, 2013	Written proposals distributed to SDLAC
August 19, 2013	SDLAC meeting, Round 1 evaluations
August 29, 2013	OSL Board Meeting
August 26-30, 2013	Round 2 Vendor demonstrations via web
August 26 - October 31, 2013	Access to vendor demonstrations and trial access for use in Round 2 evaluation provided by vendors.
September 19, 2013	LSTA Council Meeting
September 23, 2013	SDLAC meeting, Round 2 evaluations
October 25, 2013	OSL Board Meeting
October 31, 2013 (by this date)	SDLAC selects recommended vendor with the State Procurement Office, transmits recommendation to LSTA Advisory Council
December 2013	LSTA Advisory Council recommends vendor
December 13, 2013	OSL Board Meeting (approve vendor)
January – February 2014	State negotiates contract with selected vendor.

February 2014	DOJ Contract Review
March 2014	Contract executed/Implementation begins
July 31, 2014	Gale contract ends

Appendix 1: Survey Questions

January 2011 Survey Questions

1. When using the databases currently provided via the State Library, does your library experience content gaps and needs?
2. Can you tell us a bit about content gaps and needs your library encounters?
3. Looking to the future (2-4 years), do you see any changes in content needs (i.e. more Oregon newspapers, fewer national newspapers)?
4. Does a single database model fulfill the State's requirement?
5. What makes a database appealing to your patrons; e.g., depth and breadth of information; availability of primary sources; ease of searching, etc.?
6. Anything else you'd like the SDLAC to consider?
7. Please indicate your library type.

March 2013 Survey Questions

1. Which type of library are you most associated with?
    - Academic
    - Public
    - School
    - Tribal
    - Other

2. Please rank the following categories of resources in order of importance to your library to have available through the Statewide Database Licensing Program. (1 being the most important, 7 being the least important). Note: After you make your first selection, the survey will reorganize and automatically number the rest of the list.

    - *Career, Job and Computer Skills Resources* - electronic resource(s) supporting people (students through adults) seeking career information, standard practice tests, and the acquisition of job skills.
    - *Contemporary Issues Resources*--a variety of contemporary issues resources to encourage critical thinking, issue awareness, pro/con arguments where a wide range of current topics are presented and easily accessible updated and new topics added on a regular basis, weekly or monthly.
    - *Ebook Collections of Nonfiction Books* - a collection of non-fiction book content in a digital format covering a wide array of subjects and disciplines for recreational and research needs.
    - *General Periodicals* - a database(s) of popular magazine and scholarly journal articles to meet the typical needs of four types of libraries and their users.
    - *Newspapers* - comprehensive full-text database of major international, national and Oregon newspapers, magazine articles, radio and TV news program transcripts searchable as a single file.
    - *Peer Reviewed Journals* - a database(s) of peer-reviewed journal articles to meet the typical research needs of community colleges, public universities

and 4 year institutions. The majority of the content will be full text without embargoes. All disciplines should be represented including but not limited to arts, humanities, social sciences, physical and life sciences, business and health sciences.

- *Research/Reference Resources* - a collection of research and reference sources with a breadth of coverage of subjects, and disciplines of interest to public, school, tribal and academic libraries. Examples include encyclopedias, dictionaries, directories, etc.
- *Open-Ended Response*--More expensive database(s) in which your library may need to share in the cost. Less expensive database(s) that would be available to all libraries for free.

3. Are there any other categories of electronic resources that should be included in the Statewide Database Licensing Program? Please describe.
   Open-Ended Response

4. Electronic resources vary significantly in cost, and funds available for statewide licensing are limited. If the Committee had to choose, which of the following options would you prefer?
   - More expensive database(s) in which your library may need to share in the cost.
   - Less expensive database(s) that would be available to all libraries for free.
   - Other (please specify)