

Developing a Process for Analyzing and Visualizing E-Resource Packages with Power BI



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The rising STAR of Texas

Agenda

- ❖ **Vision for a new position**
- ❖ **Sage Project**
- ❖ **Emerald Project**
- ❖ **Kanopy Project**
- ❖ **Framework & checklists**

Collection Analytics Vision

**Comprehensive, well-organized data,
analyzed on a regular basis,
presented graphically using standard formats,
to inform decision-making
& explain choices to stakeholders.**

Sage E-Journal Package: How do we do this?

Sage E-Journal Package Review

- ❖ **The Sage electronic journal package includes about 800 journals spanning all subjects, and its multi-year license was up for renewal in spring of 2018**
- ❖ **Analysis:**
 - How much was it used?
 - Was the cost-per-use reasonable?
 - How does Sage support different academic areas at Texas State?
- ❖ **Timeline: January to March 2018**
- ❖ **Audience:**
 - Acquisitions
 - Subject librarians
 - Library admin

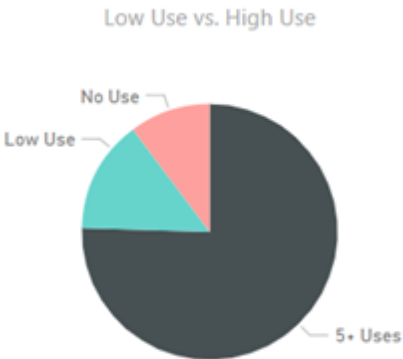
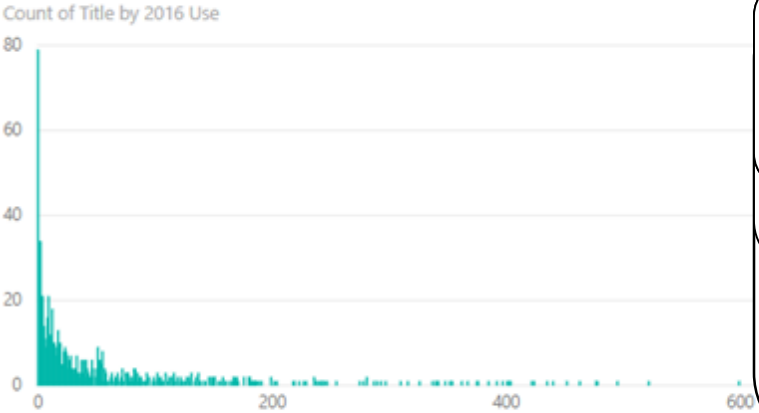
Sage Project Inputs

- ❖ **Data gathering and clean-up took approximately 2 weeks**
- ❖ **Visualization drafting and feedback took approximately 3 weeks**
- ❖ **Data sources:**
 - Usage from Sage for FY16 and FY17 (JR1 report)
 - Prices from Sage (online price list)
 - Call numbers from ILS

Match point across the data: ISSN
- ❖ **Tools:**
 - Excel + ASAP add-on
 - SQLite
 - Power BI

First Draft:

Additional context – why does 5 uses matter?
– not what we wanted!
things in an order that made sense



Price of Individ. Titles with 5+ Uses

\$584,013.16

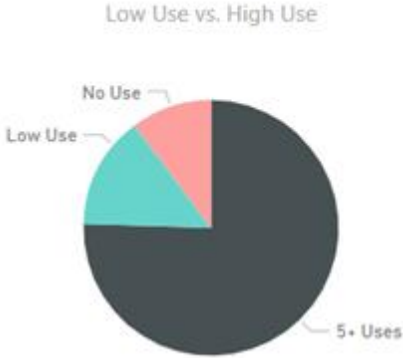
- Call # (groups)
- ☐ A -- General Works
 - ☐ B -- Ethics and Religion
 - ☐ BF -- Psychology
 - ☐ C -- Archaeology and History of Civilization
 - ☐ D -- History
 - ☐ E & F -- American History
 - ☐ G -- Geography
 - ☐ GE -- Environmental Science
 - ☐ GF -- Human Ecology and Anthropogeogr...

Title	Call #	2016 Use
American Journal of Sports Medicine, The	RC1200 .J66	1402
Environment and Behavior	HM206 .E5	1039
Journal of Interpersonal Violence	HV6618 .J68	898
Journal of Social and Personal Relationships	HM132 .J685	786
Crime & Delinquency	HV6001 .N2	704
Psychological Science	BF1	689
Australian and New Zealand Journal of Psychiatry	RC321 .A86	599
Journal of Research in Crime and Delinquency	HV6001 .J74	522
Criminal Justice and Behavior	HV9261 .C74	495
Personality and Social Psychology Bulletin	BF698.A1 P48	478
Educational Administration Quarterly	LB2805 .E34	477
Review of Educational Research	L11 .R35	463
Small Group Research	HM133 .S645	452
Urban Education	LC5101 .U7	440
Hispanic Journal of Behavioral Sciences	RC451.5.H57 H58	435
Violence Against Women	HV6250.4.W65 V5565	424
Journal of Family Issues	HQ1 .J463	422
Health Education & Behavior	RA440.A1 S63	404
Total		51337

Second Draft:

CTRL+click to select subjects to filter:

- Call # (groups)
- ☐ A -- General Works
 - ☐ B -- Ethics and Religion
 - ☐ BF -- Psychology
 - ☐ C -- Archaeology and History of Civilization
 - ☐ D -- History
 - ☐ E & F -- American History
 - ☐ G -- Geography
 - ☐ GE -- Environmental Science
 - ☐ GF -- Human Ecology and Anthropogeography
 - ☐ GN -- Anthropology
 - ☐ GV -- Recreation and Leisure
 - ☐ H -- Social Sciences General
 - ☐ HB & HC -- Economics
 - ☐ HD -- Industries, Land Use, Labor
 - ☐ HF -- Commerce
 - ☐ HG & HJ -- Finance
 - ☐ HM -- Sociology, general
 - ☐ HN -- Social History
 - ☐ HQ -- Family, Marriage, Women
 - ☐ HT -- Communities, Classes, Races
 - ☐ HV -- Social Pathology, Criminology
 - ☐ JA -- Political Science, general
 - ☐ JF, JK, JN -- Political Institutions and Public Administ...
 - ☐ JV -- Colonization and Migration
 - ☐ JX & JZ -- International Law and Relations
 - ☐ K -- Law
 - ☐ L -- Education
 - ☐ M -- Music
 - ☐ No call number
 - ☐ NX -- Art, general
 - ☐ P -- Language and Literature
 - ☐ Q -- Science, general
 - ☐ QA -- Math
 - ☐ QB -- Astronomy
 - ☐ QC -- Chemistry



2016 Package Cost

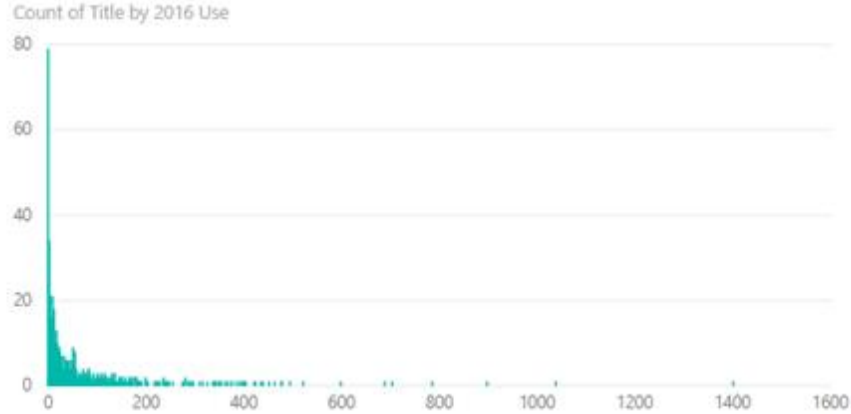
\$185,927.80

Price of Indiv. Titles with 5+ Uses

\$584,013.16

Title	Call #	2016 Use
Ameri		8
Enviro		7
Journa		3
Journa		2
Crime		2
Psycho		2
Austra		2
Journa		2
Crimin		2
Person		2
Educa		2
Review		2
Small		2
Urban		2
Hispan		2
Violence Ap		2
Journal of Family Issues	HQ1 J463	422
Health Education & Behavior	RA440.A1 S63	404
Total		51337

Bigger questions emerged – what do we want people to take away from this? Who is our audience really?

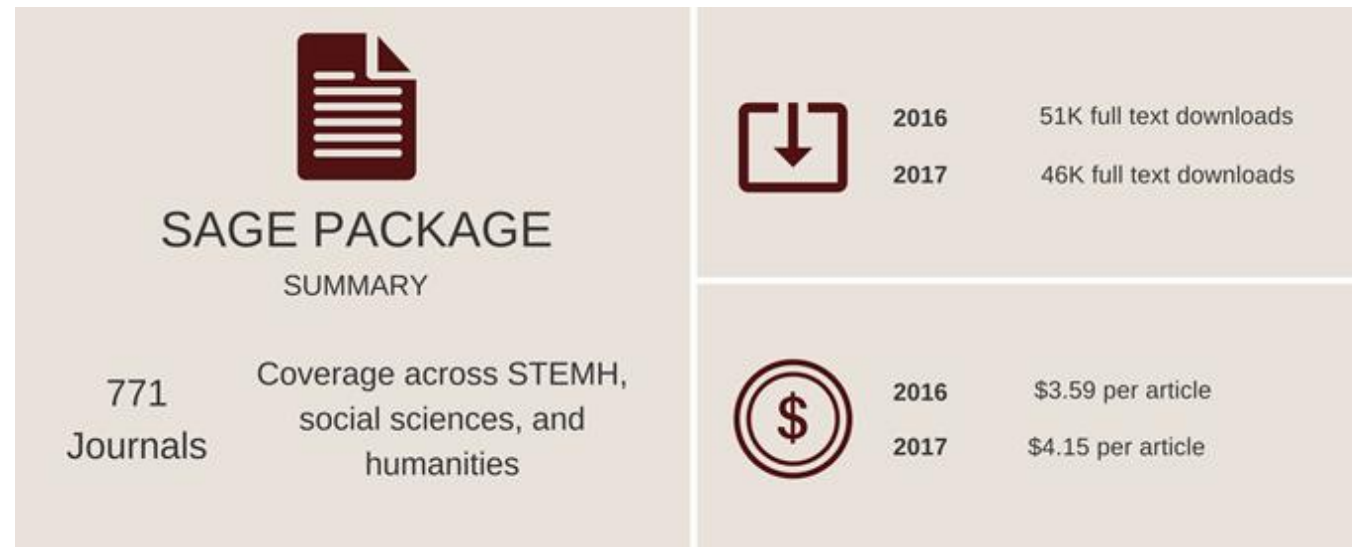


Knowing Your Audience

- ❖ **Important questions before preparing your work:**
 - What do they already know?
 - What acronyms might they need specified?
 - What do they want to come out knowing? What are their goals?
 - How much time do they have?
 - How will you share it with them? Does it require an account/embedding your work somewhere?
- ❖ **Admin level: may be interested in higher level questions and presentation or executive summary type formats**
 - Additionally, they may be showing this to people outside the library – it is a good idea to minimize jargon if an external audience is going to be involved
- ❖ **A truism of user experience: if you ask someone to describe their ideal end goal of a project, they might not know!**

Final Version, part 1

- ❖ Split between audience use, with both interactive and non-interactive elements
- ❖ Embedded online for easier sharing
- ❖ First section serves as executive summary:



Final Draft, part 2:

Select subjects to filter:

- ☐ A -- General Works
- ☐ B -- Ethics and Religion
- ☐ BF -- Psychology
- ☐ C -- Archaeology and History of Civilization
- ☐ D -- History
- ☐ E & F -- American History
- ☐ G -- Geography
- ☐ GE -- Environmental Science
- ☐ GF -- Human Ecology and Anthropogeography
- ☐ GN -- Anthropology
- ☐ GV -- Recreation and Leisure
- ☐ H -- Social Sciences General
- ☐ HB-HJ -- Business and Economics
- ☐ HM-HT -- Sociology
- ☐ HV -- Social Pathology, Criminology
- ☐ JA -- Political Science, general
- ☐ JF, JK, JN -- Political Institutions and Public Administration
- ☐ JV -- Colonization and Migration
- ☐ JX & JZ -- International Law and Relations
- ☐ K -- Law
- ☐ L -- Education
- ☐ M -- Music
- ☐ No call number
- ☐ NX -- Art, general

The total number of journals that
matches your current filter is:

771

Title	Call #	2017 Use
American Journal of Sports Medicine, The	RC1200 .J66	1234
Journal of Interpersonal Violence	HV6618 .J68	851
Journal of Social and Personal Relationships	HM132 .J685	717
Hispanic Journal of Behavioral Sciences	RC451.5.H57 H58	702
Urban Education	LC5101 .U7	677
Psychological Science	BF1	672
Crime & Delinquency	HV6001 .N2	560
Armed Forces & Society	U21.5 .A74	483
Criminal Justice and Behavior	HV9261 .C74	483
Review of Educational Research	L11 .R35	463
Journal of Research in Crime and Delinquency	HV6001 .J74	448
Journal of Teacher Education	LB1705 .N27	392
Personality and Social Psychology Bulletin	BF698.A1 P48	390
Journal of Family Issues	HQ1 .J463	382
International Journal of Offender Therapy	HV9261 .J6	375
Total		46840

Final Draft, part 3:

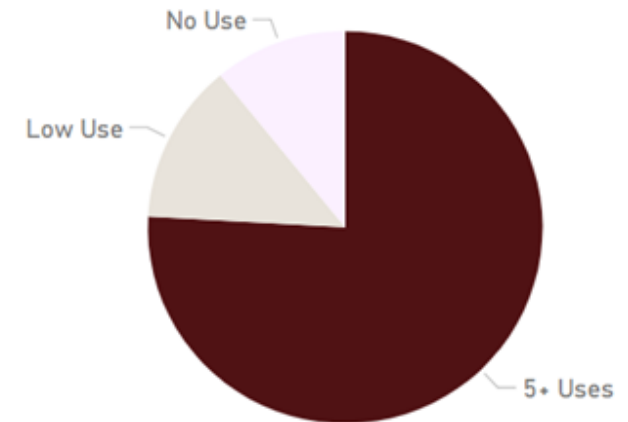
Select subjects to filter:

- ☐ A -- General Works
- ☐ B -- Ethics and Religion
- ☐ BF -- Psychology
- ☐ C -- Archaeology and History of Civilization
- ☐ D -- History
- ☐ E & F -- American History
- ☐ G -- Geography
- ☐ GE -- Environmental Science
- ☐ GF -- Human Ecology and Anthropogeography
- ☐ GN -- Anthropology
- ☐ GV -- Recreation and Leisure
- ☐ H -- Social Sciences General
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- ☐ HM-HT -- Sociology
- ☐ HV -- Social Pathology, Criminology
- ☐ JA -- Political Science, general
- ☐ JF, JK, JN -- Political Institutions and Public Administration
- ☐ JV -- Colonization and Migration
- ☐ JX & JZ -- International Law and Relations
- ☐ K -- Law
- ☐ L -- Education
- ☐ M -- Music
- ☐ No call number
- ☐ NX -- Art, general

If we dropped Sage and resubscribed to all journals used more than 5 times, it would cost:

\$581,106.16

More than 75% of Sage titles had more than 5 uses, meaning using ILL instead of subscribing would incur copyright fees.



Emerald E-Journals: Extending the Analysis

Why more analysis for Emerald?

❖ Cost Per Use:

- Sage \$4.15
- Emerald \$10.54

❖ More than 5 uses:

- Sage 75.9%
- Emerald 59.8%

The top 4 subject collections account for 53% of FY18 uses.

Subject Collection	FY18 Use ▼
Marketing eJournal Collection	831
Education eJournal Collection	620
HR, Learning and Organization Studies eJournal Collection	591
Business, Management and Strategy eJournal Collection	585
Public Policy and Environmental Management eJournal Collection	478
Health and Social Care eJournal Collection	443
Operations, Logistics and Quality eJournal Collection	291
Accounting, Finance and Economics eJournal Collection	261
Information and Knowledge Management eJournal Collection	240
Library Studies eJournal Collection	231
Tourism and Hospitality Management eJournal Collection	87
Engineering eJournal Collection	83
Property Management & Built Environment eJournal Collection	68
Total	4809

Titles and Use by Subject Collection

Current filters: 10

Subject Collection	Subject Collection Acronym	Price	TotalUse
Marketing eJournal Collection	emar	\$21,528.00	1733
HR, Learning and Organization Studies eJournal Collection	ehrlos	\$23,367.54	1219
Business, Management and Strategy eJournal Collection	ebms	\$44,587.80	1148
Education eJournal Collection	eedu	\$19,375.20	1143
Public Policy and Environmental Management eJournal Collection	eppem	\$11,881.80	799
Health and Social Care eJournal Collection	ehsc	\$27,852.54	748
Operations, Logistics and Quality eJournal Collection	eolq	\$16,615.20	519
Library Studies eJournal Collection	elib	\$16,180.50	443
Accounting, Finance and Economics eJournal Collection	eafe	\$32,167.80	421
Information and Knowledge Management eJournal Collection	eikm	\$12,606.30	399
Engineering eJournal Collection	eeng	\$25,654.20	263
Property Management & Built Environment eJournal Collection	epmbe	\$17,146.50	158
Tourism and Hospitality Management eJournal Collection	emth	\$8,280.00	136
Total			9129

Journal	TotalUse
Policing: An International Journal	551
British Food Journal	91
International Journal of Sociology and Social Policy	41
International Journal of Public Sector Management	38
Disaster Prevention and Management: An International Journal	34
International Journal of Public Leadership	22
Management of Environmental Quality: An International Journal	8
Transforming Government: People, Process and Policy	7
International Journal of Emergency Services	6
Journal of Public Procurement	1
Total	799

ILL Copyright Fees Apply When

**More than 5 articles
published in a given year
from a given title
are borrowed in a year.**

Example: British Food Journal, 2018 ILL Requests

3 articles published 2018 = no copyright fees

8 articles published 2017 = copyright fees for 3 articles

2 articles published 2016 = no copyright fees

FY

☐ 2017☒ 2018

Subject Collection

☐ Health and Social Care☐ HR, Learning and Orga☐ Information and Knowl☐ Library Studies eJourn☐ Marketing eJournal Col☐ Operations, Logistics an☐ Property Management☒ Public Policy and Envir☐ Tourism and Hospitality

Title and Use by Year of Publication

Journal	YOP 2014	YOP 2015	YOP 2016	YOP 2017	YOP 2018
British Food Journal	5	3	2	8	3
Disaster Prevention and Management: An International Journal	1	0	8	3	2
International Journal of Emergency Services	0	0	0	2	0
International Journal of Public Leadership	0	2	1	4	6
International Journal of Public Sector Management	0	0	0	3	3
International Journal of Sociology and Social Policy	3	0	0	0	0
Journal of Public Procurement	0	0	0	0	0
Management of Environmental Quality: An International Journal	0	0	0	0	0
Policing: An International Journal	3	17	45	76	69
Transforming Government: People, Process and Policy	0	0	0	3	0
Total	12	22	56	99	83

Emerald E-journals: Final presentation?

- ❖ **Which subject collection data should we present?**
 - **Collection name**
 - **Collection use**
 - **Collection price**
 - **Price per download (using collection pricing vs. full package price?)**

Kanopy PDA: So, it's not e-journals...

Issue: Triggered content outpacing sustainability of current PDA/DDA budget

- ❖ **What kinds of data are needed for analysis?**
- ❖ **What can be useful with scant data and disparate data?**
- ❖ **What does the data tell us?**
- ❖ **How can we communicate the issues, displaying the data in an understandable way?**

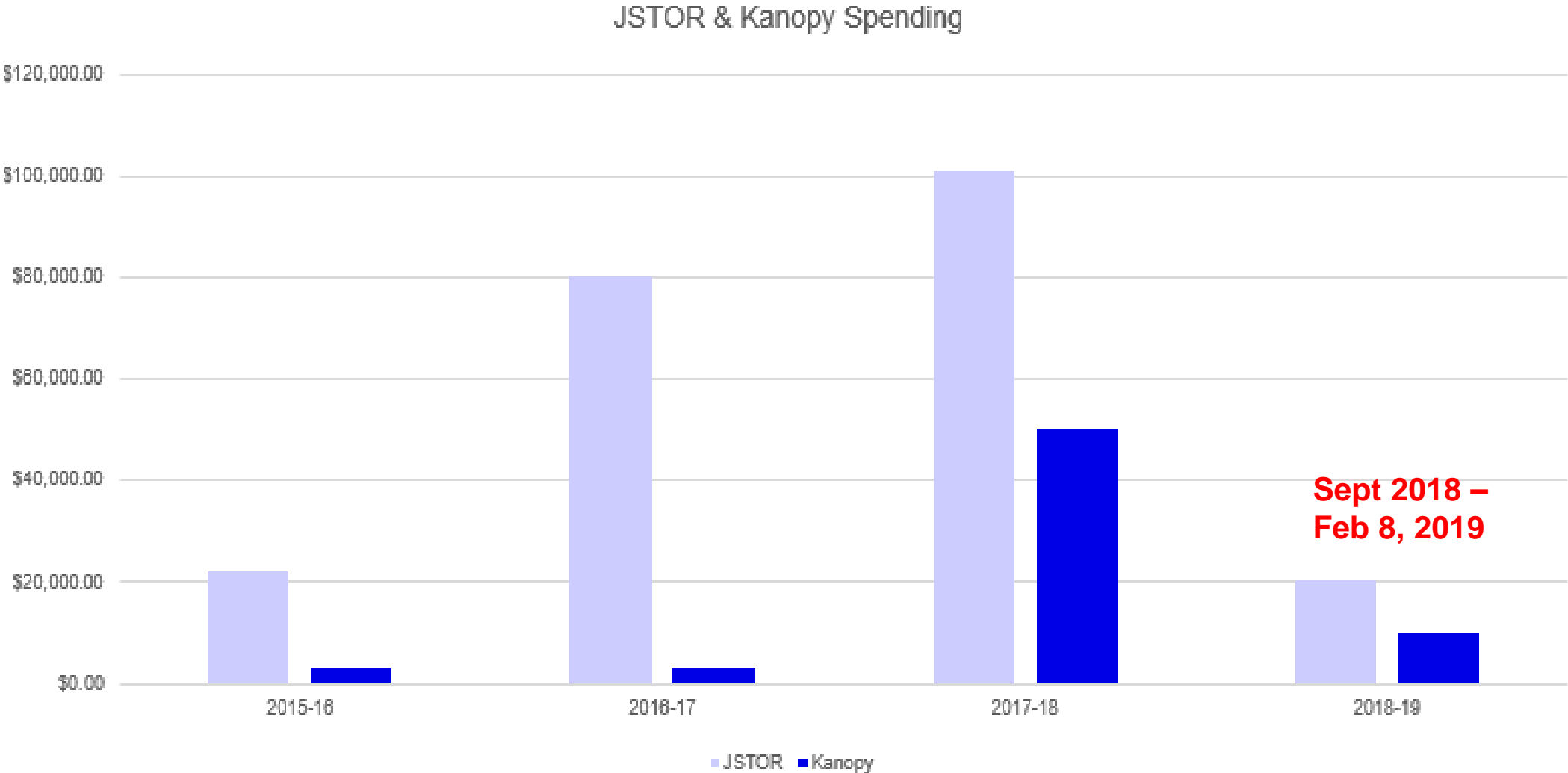
	Total spent	% total growth	JSTOR	% growth	% spend	Kanopy	% growth	% spend
2015-16	\$25,177.32		\$21,977.32		87%	\$3,200.00		13%
2016-17	\$83,350.00	70%	\$80,150.00	73%	96%	\$3,200.00	0%	4%
2017-18	\$151,003.79	45%	\$100,750.00	20%	67%	\$50,253.79	94%	33%
2018-19 (Feb)	\$30,550.00		\$20,550.00		67%	\$10,000.00		33%
	Total allocation							
	\$100,000.00		\$20,550.00		21%	\$10,000.00		10%

Flat budget year

JSTOR average spend 83% of total allocation
 Kanopy average spend 17% of total allocation

Projected negated with flat budget allocation

Spending by year



Starting our internal analysis: realities in spending

- ❖ JSTOR DDA averaged 83% of the spending on the two resources combined
- ❖ Kanopy previously averaged around 8% of spending with fixed deposit
- ❖ Kanopy PDA spending grew 94% in a single year
- ❖ Flat budget allocation Sept 2018
- ❖ Removed two packages with number of duplicates; suppressing dupe records
- ❖ Sept 2018 – Feb 2019 Kanopy spending 33% of total spend, 10% total allocation
- ❖ Sept 2018 – Feb 2019 Kanopy spending already at 10% of 17% projection

Pace of spending month to month

	2015-16	2016-17	2017-18	2018-19
Sept	\$3,200.00			
Oct			\$3,600.00	
Nov		\$3,200.00		\$5,000.00
Dec			\$21,400.00	\$5,000.00
Jan				
Feb				
Mar			\$6,090.79	
Apr				
May				
Jun			\$6,000.00	
July				
Aug			\$13,163.00	
FY TOTAL	\$3,200.00	\$3,200.00	\$50,253.79	\$10,000.00

Oct - Nov 2017	2 months	\$ 3,600.00		2015-16	Base rate - additional titles were ordered and funded by subject area allocations									
Dec 17 - Feb 18	3 months	\$ 21,400.00		2016-17	Base rate - additional titles were ordered and funded by subject area allocations									
Mar 17 - July 17	5 months	\$ 12,090.79		2017-18	Base rate plus introduction of PDA deposits, no subject area funds									
Aug 17 - Oct 18	3 months	\$ 13,163.00												
Nov 18 - Jan 19	3 months	\$ 10,000.00												

Pace of spending: the Power BI view



Analysis with Usage and Power BI

File Home Insert Data Review View Tell me what you want to do Open in Excel																Share Comments					
Undo		Clipboard		Font				Alignment		Number		Tables		Cells		Editing					
Paste		Cut Copy		Calibri 11 A A				Wrap Text		Currency		Conditional Formatting		Insert Delete Format		Clear Sort & Find & Filter					
Format Painter				B I U D ab				Merge & Center		\$ %											
M1 53100																					
Title by title lease: Requested individually; paid out of subject funds																One year lease = \$150		\$53,100			
PDA leased: Triggered and leased; previously in PDA program; lease for one year																Three year lease = \$350					
Jan 2018 - Jan 2019																					
Collectio Kanopy Video Title Supplier Renewal Date Cost (paid 2018-15 Plays 16-1 Mins 16-1 Plays 17-1 Mins 17-1 Plays 18-Jan1 Mins 18-Jan1 Bib # Note Subjects																					
PDA leased 1113649 ...And The Earth Did Not Swallow Him Kino Lorber Edu 2019-09-26 \$150.00 14 224.9 15 113.28 29 749.4 b26334896																				Latin American Studies,World Cinema,Movies,Drama,Independent Cinema	
PDA leased 1229044 2e: Twice Exceptional - Gifted Childrer Child of Giants 2019-06-24 \$150.00 4 57.67 6 161.15 0 0 b36152407																				Child Health,Mental Health,Documentaries,Education Documentary,Health & Wellness	
PDA leased 1617259 500 YEARS - Life in Resistance New Day Films 2019-04-26 \$150.00 10 152.5 25 580.08 b46721058																				History - Modern,Human Rights,Latin American Studies,Documentaries,Historical Perspec	
PDA leased 1109611 56 Up First Run Features 2019-02-22 \$150.00 0 0 6 431.23 0 0 prob not rene No Kanopy																				Psychology,Sociology,Staff Picks,Documentaries,Politics & Current Affairs	
PDA leased 1507480 70 Acres in Chicago: Cabrini Green - T New Day Films 2019-10-25 \$150.00 4 74 3 160.9 b46720029																				Race & Class Studies,African Studies,North American Studies,Sociology,Documentaries,Et	
PDA leased 1109417 A Family of Many Nations Documentary Educational 2019-03-25 \$150.00 3 3.13 15 385.43 6 205.45 b30817092																				North American Studies,Documentaries,Education Documentary	
PDA leased 1152888 A Girl Walks Home Alone at Night Kino Lorber Edu 2019-10-25 \$150.00 6 13.08 29 772.7 9 220 b30861640																				World Cinema,Staff Picks,Movies,Middle Eastern Studies,Horror & Thriller	
PDA leased 1113467 A Man Escaped Janus Films (The Criterion 2019-06-24 \$150.00 0 0 7 208.1 4 210.65 b36152407																				Film Studies,European/Baltic Studies,World Cinema,Movies,War & Action,Classic Cinema	
PDA leased 1219426 A Poem is a Naked Person Janus Films (The Criterion 2019-06-24 \$150.00 5 338.07 1 84.27 b3615975x																				Film Studies,Music,Documentaries,Art & Artists	
PDA leased 1113687 A Tale Of Two Sisters - Janghwa, Hong Kino Lorber Edu 2019-06-24 \$150.00 2 109.4 1 4.03 8 272.53 b26335049																				Asian Studies,World Cinema,Staff Picks,Movies,Horror & Thriller	
PDA leased 1113691 A Touch of Sin Kino Lorber Edu 2019-02-22 \$150.00 0 0 4 140.02 8 481.17 b26335062																				Asian Studies,World Cinema,Staff Picks,Movies,War & Action	
PDA leased 1111551 A Trip to the Moon - In Its Original 1902 Colors/The Extraordinary Janus Films (The Criterion 2019-08-26 \$150.00 1 8.22 8 39.82 9 79.8 b27334624																				Film Studies,Early Film	
PDA leased 1113083 A Woman Under the Influence Janus Films (The Criterion 2019-01-28 \$150.00 1 62.57 3 24.18 4 154.78 b27174189																				Film Studies,Movies,Drama,Classic Cinema	
PDA leased 1250153 Abrazos - Children of Undocumented New Day Films 2019-10-25 \$150.00 0 0 3 7.5 3 7.45 marc submit marc																				Race & Class Studies,North American Studies,Latin American Studies,Sociology,Documen	
PDA leased 1094818 Adlerian Family Therapy - With James Psychotherapy.net 2019-09-26 \$150.00 1 5.08 15 58.98 7 30.8 prob not rene Alt access																				Psychology	
PDA leased 1094822 Adlerian Play Therapy - With Terry Kot Psychotherapy.net 2019-08-26 \$150.00 3 23.37 b30802945 Alt ASP; no																				Psychology,Child Health	
PDA leased 1285181 Admiral Hyman G. Rickover and The B PBS 2019-03-25 \$150.00 5 116.58 marc submit marc																				Environmental Sciences,History - Modern,Documentaries,Science, Nature & Technology,I	
PDA leased 1512856 Africa (First peoples. Episode 2, Africa PBS 2019-12-24 \$150.00 1 13.22 52 1222.5 b46720066 Alt access																				Biology,Documentaries,TV Series,Science, Nature & Technology	
PDA leased 1081951 Age Happens Intelecom Learning 2019-04-26 \$150.00 27 504.3 40 753.48 10 252.3 b30859177																				Everyday Health	
PDA leased 1113499 Ali: Fear Eats the Soul 2019-09-26 \$150.00 0 0 4 149.43 6 190.28 b27176150																				Film Studies,World Cinema,German Studies,Movies,Drama,Classic Cinema	
PDA leased 1113501 Alice in the Cities Janus Films (The Criterion 2019-05-24 \$150.00 0 0 4 137.2 3 17.45 b27176162																				Film Studies,World Cinema,German Studies,Movies,Drama,Classic Cinema	
PDA leased 1112923 Amarcord Janus Films (The Criterion 2019-12-24 \$150.00 1 126.05 2 107.28 2 138.43 b27173471																				European/Baltic Studies,World Cinema,Movies,Comedy,Classic Cinema	
PDA leased 3181012 American Socialist - The Life and Time First Run Features 2019-03-25 \$150.00 4 120.27 0 0 b47445312																				Political Science,Race & Class Studies,Religion & Philosophy,History - Modern,North Amer	
PDA leased 1098661 American Tongues - Linguistic Attitude The Center for New Ameri 2019-10-25 \$150.00 1 54.45 5 119.03 b26614790 Alt access																				Race & Class Studies,ESL & Languages,North American Studies,Sociology,Documentaries,I	
PDA leased 1512854 Americas (First peoples series) PBS 2019-12-24 \$150.00 17 355.13 b46720054 Alt access																				Biology,Documentaries,TV Series,Science, Nature & Technology	

FY17 Cost:
\$26,250

Videos leased:
213

FY17 Plays:
1,803

FY17 Minutes played:
51,119

FY17 Cost-per-use:
By play: \$14.55
By minute: \$0.51

FY18 Cost:
\$50,254

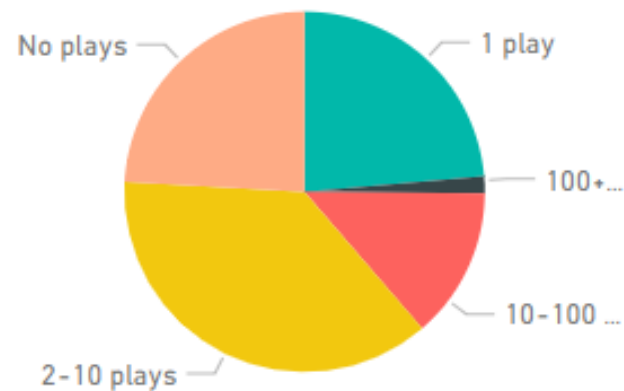
Videos leased:
321

FY18 Plays:
4,662

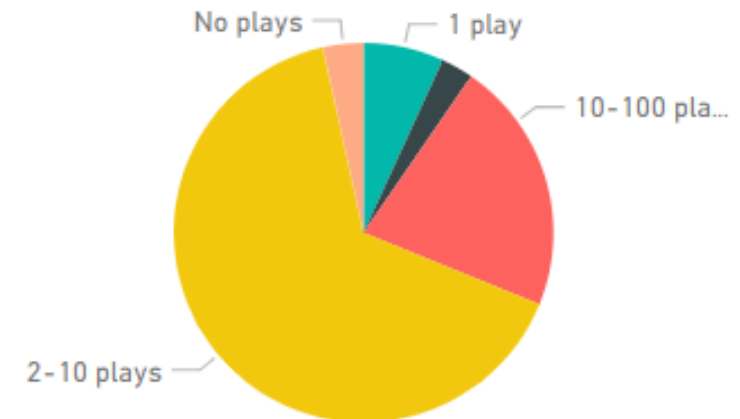
FY18 Minutes played:
158,355

FY18 Cost-per-use:
By play: \$10.77
By minute: \$0.32

Videos played in FY17



Videos played in FY18



By supplier

\$11

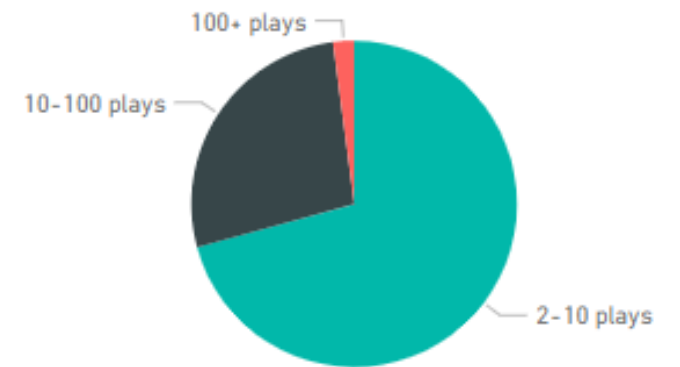
Cost per play

Video Title	Cost per play	Mins 17-18
A Tale Of Two Sisters - Janghwa, Hongryeon	\$150	4.03
Africa (First peoples. Episode 2, Africa.)	\$150	13.22
American Tongues - Linguistic Attitudes in the U.S.	\$150	54.45
Barbara	\$150	1.35
Black Sabbath	\$150	92.45
Finding Oscar - Guatemala's Legacy of Violence and Justice	\$150	2.00
Heaven is a Traffic Jam on the 405 - A Portrait of an Artist Coping with Mental Illness	\$150	42.10
Home Sweet Home	\$150	9.05

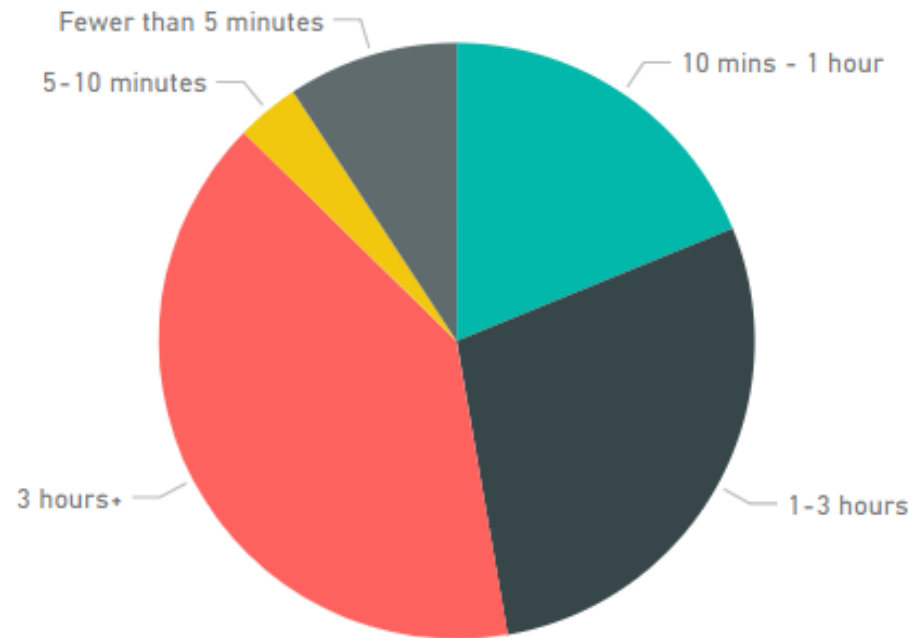
Supplier	Count of Video Title	Plays 17-18	Mins 17-18	Cost (paid 2018-19)
Janus Films (The Criterion Collection)	88	794	32,977.69	\$13,200
Kino Lorber Edu	35	559	18,869.35	\$5,250
PBS	21	684	27,650.02	\$3,150
Learning Seed	16	53	334.77	\$2,400
First Run Features	15	102	4,145.86	\$2,250
New Day Films	13	65	1,312.72	\$1,950
California Newsreel	11	576	18,372.90	\$1,650
Psvchotherapy.net	10	87	1,348.32	\$1,500
BBC	6	22	714.32	\$900
Flicker Alley	6	32	180.16	\$900
Music Box Films	6	22	938.45	\$900
The Orchard	5	12	364.58	\$750
Davidson Films	4	52	1,252.25	\$600
Green Planet Films	4	16	553.85	\$600
	3	15	242.52	\$450
Film Ideas	3	104	3,183.68	\$450
Media Education Foundation	3	174	2,020.37	\$450
National Film Board of Canada	3	9	60.44	\$450
The Great Courses	2	18	244.62	\$450
Total	308	4027	134,428.71	\$46,200

Fiscal vs Calendar Year

This page looks at the data another way. If a video was triggered to be leased in February 2017, this data reflects the usage from the day it was triggered to the day the original lease ends or is renewed.



Videos played for fewer than 10 minutes cost \$5550, meaning that any surfing/browsing behavior is truly making a dent in the annual budget for patron-driven loans.



460.37

Average of Mins 17-18

Going Forward

- ❖ **Communicate the message to stakeholders in an interactive, easy-to-understand format with Power BI**
- ❖ **Short-term stop-gap measure: Title-by-title by request only; funding from departmental allocations as if for firm orders**
- ❖ **Present possible solutions**
 - Continue request only; funding from departmental allocations
 - Popular content grouped to create a targeted PDA program
 - Turn off program between semesters
 - Combination of any of these
 - New and creative solutions!
 - Start a dialogue with vendors to work out technological solutions

Frameworks & Checklists

Initial Planning: Describe Project Goals

- ❖ **What are we analyzing and visualizing?**
 - E-journal package subscription
 - Demand-driven streaming video
 - Print monographs
- ❖ **Why are we analyzing and visualizing?**
 - Subscription renewal
 - Budget allocation
 - Space needs
- ❖ **Who is the audience for our analysis?**
 - Background knowledge? Context needed?
 - Executive summary? Detail? Both?
 - Multiple audiences?
- ❖ **How will we share information?**
 - Interactive? Public?

Develop Research Questions

- ❖ How much is this resource used?
- ❖ How much does it cost per use?
- ❖ What subjects/programs does it support?
- ❖ What alternatives exist for providing this information?
- ❖ What do the alternatives cost?
- ❖ What are the cost trends over time?
- ❖ What are the use trends over time?
- ❖ Does this resource overlap with other resources?
- ❖ What's unique about this resource?

Identify Data Sources

- ❖ **What data elements do we need?**
 - Downloads, plays, minutes played?
 - Cost? Fiscal year, calendar year, annual fee, monthly variable costs?
 - Perpetual access or lease?
 - Span of time to analyze?
 - Subjects?
- ❖ **Do we have any data on hand?**
- ❖ **What data is missing or hard to find, and how to communicate that?**

Create Realistic Timeline

- ❖ Project goals & design
 - ❖ Data collection and cleanup
 - ❖ First draft & feedback
 - ❖ Second draft & feedback
 - ❖ Third draft & feedback, and more if needed
 - ❖ Distribute or present
-
- ❖ Note: all projects covered in this presentation took at least a month and generally more

Lessons learned.

**Everything takes longer than expected.
You'll never have all the data you want.
Revise, revise, revise. Then revise again.**

At some point, you have to stop.

Questions?