

Acquisitions Institute 2019

Turner: Developing a Vendor Scorecard as a Tool to Re-Allocate Acquisitions Dollars and Transform Scholarly Communication

Question	Role(s)	Value	Functional area to respond
About the Vendor			
Timestamp		autocollected	
Email Address		autocollected	
Evaluator		short text	
Vendor Name		short text	
Parent Company (if applicable)		short text	
Additional vendor roles		provider, licensor, platform, vendor	
Applicable license		short text	
The vendor is:		multiple choice: non-profit, for profit	
The vendor is		multiple choice: public, private/LLC	
Notes on this vendor		short text	
Collaborations & Partnerships			
Signatory to COPE Core Practices?	content provider	multiple choice: yes, no, not applicable	Scholarly Communication
Complies with COUNTER standards for usage statistics?	platform	multiple choice: yes, no, not applicable, other (with text)	Acquisitions
Follows Efficiency and Standards for Article Charges workflow guidelines	content provider	multiple choice: yes, no, not applicable, other (with text)	Scholarly Communication
Adheres to FAIR data principles	content provider	multiple choice: yes, no, not applicable, other (with text)	Scholarly Communication; Data Librarian
Complies with the KBART standard for title lists	content provider	multiple choice: yes, no, not applicable, other (with text)	DRMS
Complies with metadata standards	content provider	multiple choice: yes, no, not applicable, other (with text)	Metadata Unit
Complies with the open discovery standard?	content provider	multiple choice: yes, no, not applicable, other (with text)	DRMS
Complies with the OpenURL standard	content provider	multiple choice: yes, no, not applicable, other (with text)	DRMS
Follows privacy guidelines	content provider, platform	multiple choice: yes, no, not applicable, other (with text)	Scholarly Communication

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Offers a SERU agreement	vendor, content provider	multiple choice: yes, no, not applicable, other (with text)	Scholarly Communication; Licensing
Compliant with the SUSHI protocol for usage data transfer	platform	multiple choice: yes, no, not applicable, other (with text)	Acquisitions
Follows the SWORD protocol	content provider	multiple choice: yes, no, not applicable, other (with text)	Scholarly Communication
Follows the Transfer Code of Practice	content provider	multiple choice: yes, no, not applicable, other (with text)	Acquisitions; DRMS; Metadata Unit
Provides a Voluntary Product Accessibility Template	content provider, licensor	multiple choice: yes, no, not applicable, other (with text)	Accessibility Task Force; Licensing
Follows Web Content Accessibility Guidelines	content provider	multiple choice: yes, no, not applicable, other (with text)	Accessibility Task Force
Describe standard/best practice/guideline compliance		short text	All
Compliant with standards/best practices/guidelines		linear scale: 1=not compliant, 5=fully compliant	All
Compliant with federal and Massachusetts privacy laws?	content provider, platform, licensor	multiple choice: yes, no, not applicable, other (with text)	Licensing
Compliant with federal and Massachusetts accessibility laws	content provider, platform, licensor	multiple choice: yes, no, not applicable, other (with text)	Licensing
Asks for non-disclosure of contract terms	licensor	multiple choice: yes, no, not applicable, other (with text)	Licensing
Requires indemnification	licensor	multiple choice: yes, no, not applicable, other (with text)	Licensing
Describe legal compliance		short text	Licensing
Compliant with federal and Massachusetts law		linear scale: 1=not compliant, 5=fully compliant	Licensing
Provides acceptable authentication systems	content provider	multiple choice: yes, no, not applicable, other (with text)	DRMS
Exports data in formats that can be ingested by our systems	content provider	multiple choice: yes, no, not applicable, other (with text)	DRMS; Metadata Unit; Scholarly Communication
Supports Digital Object Identifiers	content provider	multiple choice: yes, no, not applicable, other (with text)	DRMS; Scholarly Communication
Supports ORCID's	content providers	multiple choice: yes, no, not applicable, other (with text)	DRMS; Scholarly Communication

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Describe compatibility with relevant tools	all	short text	All
Integrates with compatible tools	all	integrate, 5=integrates completely	All
Acknowledges inquiries and problem reports within 48 hours	vendor, content provider, platform	linear scale: 1=never, 5=always	DRMS; LTS; Research Services; SEL
Responds to pricing or trial requests within 7 business days	vendor	linear scale: 1=never, 5=always	Acquisitions
Provides renewal orders or invoices at least 45 days prior to term end date	vendor	linear scale: 1=never, 5=always	Acquisitions
Provides accurate invoices with detailed product names/components which match the order form and website	vendor	linear scale: 1=never, 5=always	Acquisitions
Provides public reference metadata documentation related to contact information, policies, standards, location of records, etc.	content provider	linear scale: 1=never, 5=always	Metadata Unit
Provides at least 30 day notification of product name changes	content provider	linear scale: 1=never, 5=always	Acquisitions; DRMS
Does not change product name or re-configure product components more frequently than biennially	content provider	linear scale: 1=never, 5=always	Acquisitions; DRMS; Research Services; SEL
Does not remove collection content more frequently than biannually	content provider	linear scale: 1=never, 5=always	Acquisitions; DRMS; Metadata Unit; Research Services; SEL
Does not request sales visits more than biannually	vendor, content provider	linear scale: 1=never, 5=always	Acquisitions; Research Services; SEL
Does not contact (phone, email) regarding "special offers" more than quarterly	vendor, content provider	linear scale: 1=never, 5=always	Acquisitions; Research Services; SEL
Describe any issues related to staff time	all	short text	All
Respectful of staff time	all	disrespectful, 5=very respectful	All
Flexible and responsive to Libraries' requests for licensing terms	licensor	linear scale: 1=not flexible and responsive, 5=very flexible and responsive	Licensing
Describe any issues related to flexibility and responsiveness to terms	all	short text	Licensing
Diversity & Inclusion	all		

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Question	Role(s)	Value	Functional area to respond
Scholarly Communications Joint Statement of Principles	content provider	multiple choice: yes, no, not applicable	Scholarly Communication
Management, editorial boards, advisory boards and/or authors represent different genders, ethnicities, and geographic regions	vendor, content provider	diverse representation, 5=has widely diverse representation	Research Services; Scholarly Communication; SEL.
Describe considerations and issues related to diversity representation	all	short text	All
Demonstrates philosophies, policies, practices and procedures that ensure equitable access to opportunities and resources for all	vendor, content provider	linear scale: 1=does not demonstrate equitable access, 5=demonstrates widely equitable access	Research Services; Scholarly Communication; SEL.
Describe considerations and issues related to demonstrated equitable access	all	short text	All
<i>Innovation & Creativity</i>			
Supports content mining	content provider, licensor	multiple choice: yes, no, not applicable, other (with text)	Licensing; Research Services; SEL
Supports content reuse in scholarly publications	licensor	multiple choice: yes, no, not applicable, other (with text)	Licensing; Scholarly Communication
Supports content use in course reserves	licensor	multiple choice: yes, no, not applicable, other (with text)	Licensing
Provides content without digital rights management	content provider, licensor	multiple choice: yes, no, not applicable, other (with text)	Acquisitions; DRMS
Supports content downloading	content provider, licensor	multiple choice: yes, no, not applicable, other (with text)	DRMS; Licensing
Supports inter-library loan	licensor	multiple choice: yes, no, not applicable, other (with text)	Licensing
Supports printing	content provider, licensor	multiple choice: yes, no, not applicable, other (with text)	DRMS; Licensing; Research Services; SEL
Supports searching within document	content provider	multiple choice: yes, no, not applicable, other (with text)	DRMS; Research Services; SEL
Supports visualization teaching	content provider	multiple choice: yes, no, not applicable, other (with text)	DRMS; Research Services; SEL
teaching	all	short text	All

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Question	Role(s)	Value	Functional area to respond
Supports provisions for broad uses of platform/resources for research & teaching	all	linear scale: 1=provides no support, 5=provides broad support	All
Offers approval plan	content provider, vendor	multiple choice: yes, no, not applicable, other (with text)	Acquisitions
Offers single title purchase	content provider, vendor	multiple choice: yes, no, not applicable, other (with text)	Acquisitions
Offers evidence-based purchase	content provider, vendor	multiple choice: yes, no, not applicable, other (with text)	Acquisitions
Offers selective packages	content provider, vendor	multiple choice: yes, no, not applicable, other (with text)	Acquisitions
Offers demand-driven acquisitions	content provider, vendor	multiple choice: yes, no, not applicable, other (with text)	Acquisitions
Offers volume discount	content provider, vendor	multiple choice: yes, no, not applicable, other (with text)	Acquisitions
Offers multi-year subscription discount	content provider, vendor	multiple choice: yes, no, not applicable, other (with text)	Acquisitions
Describe issues related to acquisition models	content provider, vendor	short text	Acquisitions
Provides flexible acquisition models	content provider, vendor	model only, 5=provides flexible models	Acquisitions
Openness & Transparency			
Offers open metadata, freely available	content provider	multiple choice: yes, no, not applicable, other (with text)	Metadata Unit
Provides transparent pricing, fees and charges	vendor	multiple choice: yes, no, not applicable, other (with text)	Acquisitions
Provides 30 day notification and reports prior to collection changes	content provider	multiple choice: yes, no, not applicable, other (with text)	Acquisitions; DRMS
Does not request non-disclosure agreement	licensor	multiple choice: yes, no, not applicable, other (with text)	Licensing
Provides accurate payment histories	vendor	multiple choice: yes, no, not applicable, other (with text)	Acquisitions
Provides open access to UMA author works within subscribed content	content provider, licensor	multiple choice: yes, no, not applicable, other (with text)	Licensing; Scholarly Communication

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Provides automatic deposit to IR for UMA author works	content provider, licensor	multiple choice: yes, no, not applicable, other (with text)	Scholarly Communication
Does not require authors to waive UMA OA policy	content provider, licensor	multiple choice: yes, no, not applicable, other (with text)	Scholarly Communication
Provides notification to Libraries when contacting faculty	content provider, vendor	multiple choice: yes, no, not applicable, other (with text)	Acquisitions; Research Services; SEL
Describe issues related to openness & transparency	all	short text	All
Demonstrates open & transparent practices	all	linear scale: 1=not open & transparent, 5=completely open & transparent	All
Sustainability & Stewardship			
Provides archiving and preservation alternatives	content provider, licensor	multiple choice: yes, no, not applicable, other (with text)	Licensing; IRM
Provides perpetual access to purchased and subscribed content	licensor	multiple choice: yes, no, not applicable, other (with text)	Licensing; DRMS
Is financially viable without excessive profits	content provider	multiple choice: yes, no, not applicable, other (with text)	Acquisitions; Scholarly Communication
Maintains stable platform w/<2% downtime	content provider	multiple choice: yes, no, not applicable, other (with text)	DRMS
Recognizes author's copyright and unlimited re-use of their content	content provider, licensor	multiple choice: yes, no, not applicable, other (with text)	Licensing; Scholarly Communication
Describe issues related to sustainability & stewardship	all	short text	
Demonstrates sustainable & stewardly practices	all	linear scale: 1=does not practice sustainability & stewardship, 5=does practice sustainability & stewardship	All