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Beyond "No": Best Practices for Responding to Resource Requests

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At a recent BRASS Virtual Discussion, business librarians commiserated over the shared frustration of having to say "no" regularly to resource requests (RUSA_BRASS, n.d.). As a mid-career business librarian, I still feel the discomfort after having said "no" numerous times. In this article, I will share some of the practices I have found helpful in responding to requests from business faculty for new databases or journals, especially when I have to say "no" without burning bridges.

Be Transparent About Budgets

A good general practice, transparency is also a helpful educational tool. The more you educate your faculty about the budget process at your library, the more likely they will understand when getting a "no." At my library, the budget model has evolved to a point where if we need to add something new, most likely we will have to cancel a resource of equal or higher cost in our specific subject area.

I created a Google Sheets document with two sheets, one for current business databases, and the other for "wish list items" (a collection of databases and journals faculty have requested over the years and also those that I am interested in if budget allows). Both sheets include resource name, content (aka, what it is about), and notes such as access restrictions. The "current databases" sheet also discloses usage statistics and cost, while the "wish list" sheet contains vendor quote and the year I received the quote. I shared this document with the entire business school and presented about it at one of their faculty meetings.

When a faculty member sends me a request, I do some homework to confirm that current databases are indeed insufficient for their goal. Then I contact the vendor to get pricing and access information (e.g., is it IP-based or login-based, is there a lower price tier for limited concurrent users, etc.), and enter all the information in the "wish list" sheet. In my email reply I refer to the document, explain the budget situation, point out the databases we cannot cancel due to very high usage, and ask them: "Will you be interested in having a school-wide conversation about which other business databases to cancel, so I don't inadvertently get rid of something other people are using?" More often than not, they appreciate the transparency, express understanding, and start to consider alternatives. Keeping the faculty fully informed of the budget and subscription practices puts them in our shoes and helps to dispel any possible suspicion that the "no" is personal.

Provide Alternatives

Ending a "no" reply with suggestions for alternatives softens the blow, and sometimes also creates opportunities. Here are some of the alternatives I have recommended:

Visit a local library that has the database. Sometimes a local public or academic library has the resource. I will do some research and share the name with the faculty member and suggest that they contact the other library by phone or via the Chat reference service before heading out. The faculty member can make sure that the resource is indeed available to the public and will also obtain useful information such as access rules, hours, and if they are able to meet with a librarian for assistance.

Collaborate with a researcher at a library that has the database. If the faculty member is at the early stage of a research project, finding a collaborator may be possible. WorldCat and LibGuides are two tools I use to find out which library has the resource, but networking with other librarians also helps, as not all resources are listed, such as Bloomberg Terminals managed by a business school. On the flip side, pointing out that a database is not even available at larger or better funded universities also provides a good context for the “no.”

Get individual access by using a personal research fund or applying for a research grant. Portland State University (PSU) faculty have an IPDA (Individual Professional Development Account) that they can use to pay for conference travels, professional association memberships, and research expenses, while the campus Faculty Development Committee administers research grants (*Faculty Development Opportunities*, n.d.). I explain that database pricing is often based on FTE (Full Time Equivalent) and therefore a database can be exceedingly expensive for a large campus like us, even if only a small number of people will actually use it. While I personally find this pricing model troubling, it is what we have to work with currently. However, individual access to such databases can be much more affordable, and some vendors also provide customized pricing based on exactly the type and amount of data the researcher needs.

Reach out to other units on campus. Sometimes another campus unit may have their own subscription to a resource. Most of the time a department subscription has a fairly strict license that doesn’t allow external users. However, it doesn’t hurt to ask. A few weeks ago, I was able to work with Burning Glass (https://www.burning-glass.com/) and an administrator at a campus unit to obtain a free (to the user) individual license that we initially thought was unavailable.

Seek Collaborative Collection Development

If there is some wiggle room in the library budget but the amount of money available to add a resource is not sufficient, you can ask the faculty member to help advocate. For example, if they can talk their department head or Dean into contributing financially, the library will manage the database (dealing with paperwork and technology issues), but the fund will come from both the library and the business school. A faculty member is often more persuasive than a librarian in soliciting financial contributions from the school, especially if the library and the school are already co-funding some resources, which is the case at PSU.

Certain resources are just not appropriate for libraries, such as databases that can only be used by “the business school”, or login-based ones that only allow a specified list of individuals. PSU Library has an explicit collection development policy that all library-funded resources must be available to the entire campus, not just a specific department or a select group of people. It is crucial for the librarian to help the faculty understand the difference between library resources and department resources, and to state clearly that such databases are best funded by the school.

Take Advantage of One-Time Funding

Sometimes the only money available is one-time and librarians may hesitate to use it for databases, as it may create the unrealistic expectation that the subscription will continue even though the source of money will dry up the following year.

Using one-time money, however, can be a great evidence-based practice. A few years ago, the PSU Library received one-time funding from the Office of Academic Innovation (OAI) to support the launch of a new online Master of Taxation (MTAX) program. The program director at the time insisted that MTAX students needed specialized tax research databases rather than books that the fund was intended for. However, tax databases are subscriptions, and the fixed amount of money was only available during the launch period of two years.

Working with the Collection Management Librarian after getting approval from OAI, I was able to use the one-time money to pay for two years of access to two new databases (*Bloomberg BNA* and *Tax Notes*). We already have a library subscription to *RIA Checkpoint*. The program director understood that there wouldn't be "new" library money to continue the subscriptions after two years. Essentially, the two databases were on "extended (paid) trials." Two years later, the new program director and I reviewed our options based on tax faculty feedback as well as pricing and content of the three databases. He eventually decided to cancel *Tax Notes* but obtained money from the school to pay for *Bloomberg BNA* so now MTAX students have access to both *BNA* and *RIA*.

I did something similar with another OAI one-time fund for another program. The program director and I used the money to pay for *Statista* for two years. The usage was so high I ended up cancelling two less used databases to make *Statista* a regular subscription. As a result of the transparent communication, the usage comparison, and the advocacy of the program director, we didn't receive any pushback regarding the exchange.

Using one-time money to pay for resources for a limited period of time fulfills the immediate needs while providing crucial information (usage statistics and user feedback) that informs future decision-making.

Conclusion

Saying "no" is not easy for many of us. However, it is important to keep in mind that librarians and business faculty are colleagues despite librarianship being a service-oriented profession and the subtle power dynamics on campus. Saying "no" is not a personal failure. The aforementioned best practices have alleviated my unease, strengthened the collaborative relationship between the library and the business school, and in some cases, actually secured the requested resources.

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