

## Collaborative Collection Development: Engaging Liaisons and Sharing Information

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## **Collaborative Collection Development: Engaging Liaisons and Sharing Information**

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### **Abstract**

Librarians at the Bailey/Howe Library of the University of Vermont found themselves in a challenging situation at the start of the 2016 fiscal year. Facing nearly unprecedented budget reductions, librarians were forced to assess current collections and expenditures, and look ahead to an uncertain future. With a critical eye on existing collection development practices, Bailey/Howe librarians embraced a spirit of collaboration and piloted a new evaluation project which engaged librarian liaisons and supported a more informed renewal decision-making process.

The collection development librarian worked closely with the liaison program director to design a project which asked liaisons to rank the library's electronic resources. The project required liaisons to provide feedback on existing resources in a holistic manner, which would be used by the collections team for renewal and cancellation decisions. This exercise provided the added opportunity for bridge-building between library departments and improved transparency. Liaisons were asked to rank electronic resources in their subject areas and evaluate multidisciplinary resources as a group. The collection development librarian supplied liaisons with resource lists which contained current and historic pricing and usage information. Additionally, the collection development librarian met with liaisons to discuss usage statistics and developed a quick reference sheet about usage data for liaisons to consult as needed. Although budget reductions are an unfortunate, yet common, reality in most academic libraries, the approach taken by Bailey/Howe librarians laid a foundation for collaborative collection development and liaison engagement.

### **Introduction**

For two consecutive fiscal years, the UVM Libraries budget remained flat funded. In late FY 2015, forecasts indicated the Libraries could expect a reduction in funding starting with FY 2017. Already experiencing financial pressure, Bailey/Howe librarians were forced to evaluate current collection development procedures and ask difficult questions about future strategies and methods. Coinciding with these considerations were questions about the degree of liaison involvement in collection development.

The UVM Libraries revamped its earlier bibliographic instruction program in 2007 to reflect then emerging trends in information literacy. Librarians were give liaison assignments which most closely reflected their research and instruction experience. The focus of the new program, like its earlier iteration, was on instruction services and research support. Although liaisons did not have collection development decision-making power, they were often consulted as part of renewal decisions, but

not in a systematic manner. Little effort was made to inform liaisons of current collection development trends and initiatives, and liaisons' experience with collections and perspectives on collection building varied widely.

The UVM Libraries already had experience making collections decisions cooperatively. The Bailey/Howe Library Collections Team reviews requests for new resources and evaluates renewals for continuing resources. The Collections Team includes representatives from Collection Management Services, Information and Instruction Services, Special Collections, and the Dean's Office. These representatives are responsible for sharing information with their departmental colleagues and seeking input on renewal decisions when needed. Historically, liaisons were contacted if a resource in their subject area was considered a possible candidate for cancellation and asked for input on how well the resource fit with existing curriculum and its relevance to the given discipline. Liaison feedback was highly valued by the collections team and often stood in the way of resource cancellations.

The previous method of soliciting liaison feedback for renewal decisions worked during periods of fiscal ease, but budgetary pressures made it necessary to critically assess the Bailey/Howe Library's subscription resources systematically. Liaisons were contacted at time of renewal to provide input on a single resource. Often point of contact was made very close to the renewal deadline and via e-mail, so liaisons were not asked or did not feel as though they had a real opportunity to more thoughtfully consider the resource in the context of the larger collection. A true in-depth evaluation did not always take place and therefore most resources were renewed for lack of an effective process to critically assess their value.

At the start of FY 2016, the collection development librarian and acting liaison program director partnered to develop a pilot project aimed at gathering all liaison feedback in a holistic manner. The goal of the project was to sensitize liaisons to the current budget situation, improve information sharing between technical and public services, and begin teaching liaisons about the inner workings of collection development and electronic resource usage statistics. The collection development librarian considered it an underuse of liaisons, who have the most interaction with faculty and students and awareness of the current curriculum, to not establish an open channel of communication and systematic means of gathering liaison feedback. The project was presented as a learning opportunity for not only the liaisons, but the Bailey/Howe Library's recently hired collection development librarian.

## **Literature Review**

Bailey/Howe librarians are surely not the first to critically evaluate collections in response to budget pressures. In the past decade, countless academic libraries were forced to cancel subscription resources to align annual expenditures with reduced budgets, while identifying and preserving essential resources. Evaluation criteria, rubrics, and decision matrixes are useful tools in collection assessment projects, and can instill consistency in rankings and gain buy-in from project team members. As described by McManus and Foudy, members of the

Electronic Resources Committee at University of Maryland Libraries developed a decision grid to prioritize resources and identify candidates for cancellation while engaging subject librarians. Four overarching criteria were used to rank resources: access, cost-effectiveness, breadth/audience and uniqueness (McManus & Foudy, 2005, p. 535). Blackburn, McFarland, and Reed at Vancouver Island University developed a 27-point rubric, which aided serial cancellation decisions and ensured decisions were made in a thorough, well-documented manner which could be defended if necessary (2013).

Furthermore, Emery and Stone presented broader considerations for electronic resource review in their 2013 Library Technology Report. In addition to analyzing usage statistics and gathering input from users, Emery and Stone remind readers of other contributing factors, including successful implementation, resource activation, and platform migration, which could impact recorded usage and users' perception of a resource (2013, p. 26–29).

Looking at assessment from an earlier stage in the electronic resource life cycle, Bhatt reinforced the need for liaison engagement and systematic procedures to solicit meaningful feedback that can be used in decision-making for electronic resource trials. As described in the 2015 article, Bhatt revamped existing practices to become more collaborative and consistent across resources, while relying on the participation of subject librarians (p. 124–125). Purposeful, consistent, and documented processes are essential as libraries make difficult decisions that impact collections and acquisition dollars.

## **Gathering Feedback From Liaisons, Holistically and Purposefully**

Budget pressures triggered a need for holistic collection assessment and a systematic approach to gathering meaningful feedback from librarian liaisons at the Bailey/Howe Library. The collection development librarian and acting liaison program director expected liaisons to share more thoughtful feedback when given more time and information to evaluate resources. At the start of the project, both project leaders made a point of

emphasizing how the feedback from liaisons would be factored into renewal decisions by the collections team.

Early in the 2016 fiscal year, the collection development and acquisitions/e-resources librarian met with liaisons to present updated information about the budget, explain how the collections team made renewal decisions, and describe the information and data which factored into those decisions. This meeting was intended to inform recently hired librarians and remind all liaisons of collection development procedures. In a later meeting, the collection development librarian engaged liaisons in a conversation about usage statistics, answered questions, and gave liaisons a document which could serve as an easy reference when presented with usage data in the future (see Appendix A).

Liaisons were given four weeks to rank electronic resources in their subject areas and assign a ranking to multidisciplinary resources. A meeting was scheduled after the four-week period in which liaisons could discuss multidisciplinary resource rankings as a group. The collection development librarian developed criteria to assist in the ranking of resources, which was given to liaisons along with resource lists which contained current and historic usage and pricing information (see Appendix B). Resources could be placed in three categories:

*Level 3:* Resources in this category are essential to the discipline and canceling these resources would severely impact the research and teaching of our primary user community. Alternative sources do not exist for the information contained in these resources.

*Level 2:* Resources in this category are relevant to their discipline and valuable to the library's primary user community. Alternative sources for discovery and access of information may exist.

*Level 1:* Resources in this category are not essential to their discipline or relevant to current research and teaching endeavors on campus. Cancellation of these resources would pose minimal impact to faculty and students.

Liaisons were encouraged to add comments, ask questions, and consult with the collection development librarian for overlap analysis between resources. Liaisons were asked to consider the uniqueness of content, information access and discoverability, ease of use, and if the resource met the information needs of the library's primary user community: teaching and research faculty and students.

At the end of the four weeks, the collection development librarian met again with liaisons to answer questions and facilitate a discussion about multidisciplinary resources. As part of this meeting, liaisons had the opportunity to explain their rankings and hear the opinions of colleagues. The collection development librarian followed up with liaisons individually to discuss subject-specific resources. By the end of this meeting, all electronic resources were assigned a final ranking, which was shared with the collections team along with any comments from liaisons.

## Lessons Learned

In addition to the rankings and comments received from liaisons, this project garnered fascinating—and as the case for some, unexpected—results. Perhaps the most significant benefit was the opportunity for open discussion about collections and collection development practices. Liaisons seemed to relish the chance to ask questions and voice concerns about how decisions were made. Liaisons were given the most up-to-date information about the budget's impact on collection development, which served to sensitize librarians to the overall situation and necessity to relinquish unneeded and lesser-needed resources. This level of engagement was a much needed step, especially as the library looks ahead to uncertain times. As a result of this project, the collection development librarian and a handful of liaisons are planning a smaller, targeted assessment project. The collection development librarian is optimistic about continued collaborative efforts with liaisons, which will only serve to benefit the collection.

The evaluation criteria also generated a discussion among project members. Many liaisons were

inclined to evaluate a resource according to the resource's overall value to its discipline and rank resources highly, even if recorded usage was low. The collection development librarian encouraged liaisons to consider the current curriculum and research happening on campus and recognize some resources, though valuable, did not fit local information needs. Other liaisons questioned promotion efforts and the potential connection between promotion and usage, and wondered if faculty and students were even aware of particular resources.

Final rankings and additional comments from liaisons were particularly valuable. Liaisons used the project as an opportunity to express concerns about resources in their subject area and explain the rationale behind rankings. One liaison made note of recent cancellations made in her subject areas and the need for fair and equal consideration, while another liaison pointed to the absence of resource promotion in his liaison areas as possible cause for low usage. Some liaisons even made suggestions for further, future analysis and the potential for cancellations based on findings. Also of interest was the uneven treatment and evaluation of multidisciplinary resources. Liaisons were asked to assign a ranking to each of the multidisciplinary or reference resources. At the project's final meeting, liaisons were to discuss those rankings and determine a final ranking as a group. The majority of liaisons did not rank the entire list of multidisciplinary resources, citing a discomfort and feeling of unpreparedness with assigning a ranking to resources to which they were unfamiliar. Although a handful of liaisons did rank each multidisciplinary resource and provide comments along with rankings, the overall number of rankings for multidisciplinary and reference resources was surprisingly low. This acknowledged unfamiliarity with resources, especially reference resources, was particularly interesting to the collection development librarian.

As intended, the project impacted the collection team's renewal decision-making process. The rankings helped the collections team prioritize and establish a baseline of essential resources. Decisions can be made more efficiently, because

liaison feedback is readily available. Liaisons are still contacted if further information is needed, or when a resource is recommended for cancellation. Thus far, liaisons seem to be more willing to discuss renewals, and more often those conversations are happening in advance of renewal deadlines and face to face. Within six weeks of finishing the project, the collections team was able to make an informed decision to cancel a poorly ranked online reference source. The liaisons were in full support of the cancellation, which the collection development librarian fully attributes to the evaluation project.

### **Future Projects**

With the potential for budget reductions looming, the collection development librarian expects critical assessment of collections to continue. This initial project was very much a learning opportunity, and the collection development librarian intends to refine and repeat the project in the next fiscal year. In the next iteration, the project will be based on an evaluation rubric, rather than criteria and ranking which can be misinterpreted or interpreted differently across liaisons. Greater effort will be made to conduct overlap analyses and truly determine if content is unique or accessible elsewhere. Although liaisons were encouraged to request an overlap analysis from the collection development librarian in this project, none did. This absence of analysis weakened the overall evaluation for many resources as uniqueness of content was assumed, but not verified.

In a future evaluation project, the collection development librarian would like to explore grouping liaisons according to subject area. In such an arrangement, liaisons can exchange ideas and better address the many resources which span disciplines and local liaison assignments. The collection development librarian would like to see greater collaboration among liaisons, especially when evaluating online reference materials or broad multidisciplinary resources, which impact all liaisons areas. Perhaps asking the liaisons to work in groups or clusters would facilitate such cooperation.

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## Appendix A

### *Electronic Resources Usage Statistics (Briefly) Explained*

Usage statistics can be tricky business. The glossary below aims to clarify and define the common metrics used in tracking usage statistics so liaisons can be more informed and better oriented to provide feedback on renewals and engage faculty in discussion. Any questions about usage statistics should be directed to Alana Verminski in Collection Development.

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Most database vendors follow the standards established by Project COUNTER. These standards were designed in 2002 so librarians could rely on consistent and reliable usage statistics for comparison across platforms. Release 4 of the standards was issued in April 2012 and vendors were given until December 2013 to become compliant with the new standards.

#### *Summary of COUNTER Usage Reports and Metrics: Databases*

**Searches:** A use is recorded each time a user enters terms into a search box.

**Result clicks:** A use is recorded each time a user clicks on an item found in a list of search results.

**Record views:** A use is recorded each time a user views a full database record (the “detailed” record). A user could arrive at this record from a list of search results, from browsing within the database, or from entering a full record from another record within the database.

**Session:** A use is recorded each time a user enters a database.

#### *Summary of COUNTER Usage Reports and Metrics: E-Books*

**Successful title requests:** A use is recorded each time a user accesses a complete electronic work (typically an e-book or reference work).

**Successful section requests:** A use is recorded each time a user accesses a piece (or section) of an electronic work (such as a chapter or specific entry of a larger work).

**Searches:** A use is recorded each time a user enters terms into a search box.

### *Summary of COUNTER Usage Reports and Metrics: Journals*

**Successful full-text article requests:** Usage is recorded each time an article is downloaded as a PDF or the HTML full-text is accessed. We usually describe this metric as the number of full-text downloads.

**Access denied to full-text articles:** Usage is recorded each time a user from one of our registered IP addresses is denied access to a journal article on a particular platform because the library does not subscribe to the journal. This metric is described as the number of “turnaways” or “denials.”

### *Summary of COUNTER Usage Reports and Metrics: Multimedia and Streaming Video*

**Successful full multimedia content unit requests:** A use is recorded each time a user accesses an item which is not textual (such as an image, streaming video, or downloadable audio or visual files).

### *Points of Interest*

In the transition from Release 3 to Release 4, COUNTER significantly changed the way usage is recorded for databases. When comparing usage between 2012 and 2013 or sometimes even 2013 and 2014, these changes will be visible in usage reports. Different metrics are used and for our local reports. Jimmy will note those changes.

Unfortunate for us, not all database vendors and publishers are COUNTER-compliant. Usage drawn from these content providers will not compare well with their COUNTER-compliant counterparts. In these cases, Jimmy will request more information about what type of usage is being tracked and recorded from our vendor reps. Non-COUNTER usage can be murky, and if anyone has questions about the usage, please get in touch with Alana or Jimmy and we’ll try and clarify.

### *Cost-Per-Use*

Cost-per-use (CPU) is a simple measure to gauge our return on investment for our subscriptions. CPU is calculated by dividing the annual cost by the annual usage. Ideally, we like the CPU to be below the cost to access the same item via ILL.

### *More Information About Project COUNTER*

Project COUNTER: <http://www.projectcounter.org/>

Glossary of Terms used in Release 4: <http://www.projectcounter.org/r4/APPA.pdf>

List of COUNTER-compliant vendors: <http://www.projectcounter.org/compliantvendors.html>

## **Appendix B**

### *FY 2016 Electronic Resources Review*

#### *Criteria and Questions to Consider*

#### *HOLISTIC Evaluation of Electronic Resources*

The following criteria and corresponding evaluation process is designed to gather meaningful input from librarian liaisons, which members of the collections team can consider when making renewal decisions for existing electronic resources.

By reviewing resources according to subject area, liaisons can compare content and consider the uniqueness of each resource and its contributed value to the collection.

### Questions to Consider

The questions listed below are designed to assist in critically evaluating each resource in the following areas:

1. Access & Uniqueness of Content
2. Ease of Use
3. User Community

### Ranking Criteria

Each database will be ranked on a scale of 3 to 1.

Resources ranked at a Level 3 are essential to their discipline and cancelling these resources would severely impact the research and teaching of our primary user community. Alternative sources do not exist for the information contained these resources.

Level 2 resources are relevant to their discipline and useful to faculty and students. Alternative sources for discovery and access of information may exist.

Resources that are not essential to their discipline, contain information that can be accessed elsewhere, and pose a minimal impact to faculty are ranked at Level 1.

### For More Information

For guidance in interpreting usage statistics, see the Electronic Resources Usage Statistics document uploaded to the Collections Team SharePoint Site.

For questions about overlap or gaps in content, consult with Alana. An overlap analysis may be possible depending on the availability of title lists.

<b>CRITERIA AND RELATED QUESTIONS</b>	<b>YES</b>	<b>NO</b>	<b>N/A</b>	<b>COMMENTS</b>
<b>ACCESS &amp; UNIQUENESS OF CONTENT</b>				
Does this resource meet the research and teaching needs of one or more academic departments?				
Is the information contained in this resource available elsewhere (e.g., another library resource or freely online)?				
Can the information contained in this resource be discovered elsewhere (e.g., in an index, database, Primo Central Index, or research guide?)				



What makes the content of this resource unique or essential to the discipline, if at all?				
<b>EASE OF USE</b>				
In your opinion, can users of this resource quickly and effectively reach relevant information?				
Does the database require a user to create an account to search and access information?				
Do any impediments exist in the interface, e.g., unclear language, poorly located search boxes, or difficult navigation?				
Are search functions robust?				
<b>USER COMMUNITY</b>				
Is this resource multidisciplinary and of value to multiple academic departments or disciplines?				
Is this resource used by a particular department, class, or program?				
Does this resource have broad user group, including faculty, undergraduate and graduate students, and other researchers?				