Against the Grain

Manuscript 8509

Let's Get Technical – Holistic Collection Assessment

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Let's Get Technical — Holistic Collection Assessment

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Column Editor's Note: *In this issue's column, we profile how one library decided to pilot a collection evaluation project. Meghan Burke, Metadata/Electronic Resources Librarian and Gwen Vredevoogd, Collection Development Librarian, at Marymount University describe a holistic approach to assess their collections based on program reviews. — SM & AM*

Introduction

While we constantly are performing basic collection maintenance, the librarians at **Marymount University** realized it had been well over a decade since the library collection had been assessed for content. Program collection profiles were woefully out-of-date, and the collection needed a more intensive evaluation.

Problem

Assessing library collections in a meaningful way at a small liberal arts university can be challenging. At **Marymount University**, our small size and curriculum-driven collection means we need more granular information to truly analyze our collection. Luckily, there is no shortage of studies on assessing library collections, and a review of the literature led us to **Madeline Kelly's** method of holistically assessing library collections program-by-program¹, which seemed to provide what we wanted, so in the spring 2019 we began to plan how to pilot this over the next academic year. In the spring and early summer, we identified the programs to be assessed, the cycle, and the data to be gathered. Our fiscal year ends in the summer, so this was when we gathered the information the liaison librarians would need and developed a template to guide what they should be assessing and to capture observations and decisions made during the process.

Process

By conducting collection assessment at the programmatic level, we hope to determine strengths and weaknesses in the relevant content areas and formats in order to establish any changes needed in our support of the degree program. Specifically, does the program review indicate new content areas or shifts in focus that we need to consider? And what types of resources are most useful to the program? (For example, some disciplines may prefer electronic over print, or vice versa).

We decided to select several programs that had conducted program reviews in 2018-2019, gathering various data that would inform how best to support that program moving forward, determining if areas supporting the program needed to be weeded or updated, and revising

program profiles that detail how the library's collection supports the program. We wanted a mix of graduate and undergraduate programs of different sizes. When several programs that had undergone review fell to the same librarian, we asked them to select just one program to assess. The program reviews conducted by departments gave us an idea of how the faculty plan to meet its goals over the next five years, so ideally, we would assess each program every five years.

Once we determined how we wanted to evaluate the collection and which programs to include we needed to determine the data points to use to assess the collection. For our pilot year, we chose a mix of qualitative and quantitative data. Liaison librarians will be provided with the program review itself, along with the most current data available on the use and perception of the library's print and electronic collections in the relevant subject areas. On the quantitative side, data includes:

- Electronic resource usage statistics for the 2018 annual year for databases, e-journals, eBooks, and streaming media, in COUNTER format, when available
- Total cost and calculated cost-per-use of each electronic resource
- A report of physical item circulation by **Library of Congress** classification
- Interlibrary loan statistics for both print and electronic resources, and data on the books requested through our consortium-loan service to determine gaps in the collection
- Database overlap analysis, upon request

On the qualitative side, in addition to the program review, we will evaluate:

- Sample syllabi and course assignments from the chosen programs
- Collections-related data from the library's bi-annual faculty satisfaction survey, where faculty members self-identify by department

We would like additional direct measures for student use of the collection. Possibilities to gather this information include evaluation of a selection of the bibliographies of student work (available through our Office of Planning and Institutional Effectiveness), an informal student survey about the collection, perhaps conducted at the circulation desk, or librarian-gathered data about which resources are

taught and most frequently used during library instruction sessions.

Outcomes and Anticipated Challenges

When we identify changes that need to be made to support the programs assessed, the final steps will be to weed the collection and update it with new, more relevant content, cancelling or reallocating funds to more useful electronic materials, and if necessary, adjusting our budget allocations for print and e-resources to best reflect the needs and use of the collection by the programs.

We have some reservations about the sustainability of assessing the collection this way. While assessing the collection program-by-program is much more thorough and breaks down the process so we are not trying to assess the entire collection in one year, it is a process that will need to be repeated each year as programs complete their reviews. Assessing the collection by program also places the responsibility for assessment on the liaison librarian, who will then consult with Collections to make decisions about the collection. While liaisons are responsible for collecting and weeding their content areas, this assessment is more prescribed and in-depth than undertaking a summer weeding project, or regular selection of materials. Despite these concerns, we are excited to see the results of this year's pilot and hope it will allow us to curate a collection that will serve our students and faculty the best we can.

Assessing the Pilot

After the initial pilot is complete, we should have the information to produce updated program profiles and the ability to easily identify areas to weed, update, and new resources or tools needed to purchase/subscribe. The three librarians participating in the pilot will also be providing feedback about the process itself and the usefulness of the data points we provided. Once we have completed the first round, we will make necessary improvements to the process and determine if this is the best method for collection assessment.

Tips (so far) for Starting your Own Holistic Collection Assessment

- Use the program review as a jumping-off point to make the assessment more meaningful and timelier by tying it to a preexisting cycle.

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- Identify the data points you already collect and select those that would be the most useful.
- Explore ways to add useful data points you do not already collect, if possible.
- Start small and see if this will work locally to work out any issues before it becomes programmatic.
- Make sure you have support from library faculty and staff moving forward both to gather data and help with the assessment pieces. Larger institutions may need a dedicated position to provide support.
- If you use **Alma**, become familiar with generating reports in Analytics or make friends with the person in your library who does this. 🐼

Endnote

1. Kelly, M. M. (2014). "Applying the Tiers of Assessment: A Holistic and Systematic Approach to Assessing Library Collections." *The Journal of Academic Librarianship*, 40(6), 585-591. <https://doi.org/10.1016/j.acalib.2014.10.002>.

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throw away. But the 21st century archivist needs to be a data and text miner rather than a careful selector.

When designing a data collection tool, one tries to imagine all of the questions one might want to ask of the data. You want to avoid the situation of coming up with a great question and realizing you can't address it because you didn't gather the right data in the right format at the start. Librarians and archivists and curators have made educated guesses over the centuries about what to preserve and what to discard. Those decisions, even more than the accidents of war and fire, have constrained the stories that historians can tell us about how we came to be.

In the last decades of the 20th century there was a great deal of justified anxiety over the preservation of digital formats. We've learned a lot since then. We understand redundancy and error-checking and transporting from older formats to new. The challenges aren't technological as much as they are social and organizational. Process.

The failure of the **Library of Congress's** project to establish an archive of all of Twitter is a cautionary tale of opportunity lost.⁷ Although it was launched with great fanfare, LOC was never able to muster the resources that would've been required for it to live up to the hype. I'm sympathetic to the budgetary and technical challenges that the project presented, but saddened nonetheless at the decision to revert to print-world principles of selection. Now only those tweets "with historical significance" will make it to the archive. How can we know? We can't tell if something will endure through time if we don't keep it in the first place.

It's been the responsibility of the "memory institutions" — libraries, archives, museums — to maintain the historical record over centuries. That's shifting. Scholarly journal publishers are sharing responsibility for developing preservation programs and protocols that are beyond

the capabilities of most libraries. Think **Portico**. **LOCKSS**. But these touch only a tiny fragment of what constitutes "the culture." The corporate behemoths that own the servers on which our digital culture resides haven't made long-term preservation a priority. Twitter and **LOC** took a stab at it. But it's going to take more robust partnerships, led by the experts in the memory institutions and funded by the corporations building the global infrastructure, to figure out who is going to be responsible for what and how it is all going to be paid for.

I hope they hurry. I need to know where to send that flash drive. 🐼

Endnotes

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3. Lepore, Jill. *These Truths. A History of the United States*. W.W. Norton & Co., 2018. p. 4.
4. Eco, Umberto and Jean-Claude Carrière, with Jean-Philippe de Tonnac. *This Is Not the End of the Book*. Northwestern University Press, 2012. p. 17.
5. Eco, Umberto and Jean-Claude Carrière, with Jean-Philippe de Tonnac. *This Is Not the End of the Book*. Northwestern University Press, 2012. p. 200.
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7. Daley, Jason. "The Library of Congress Will Stop Archiving Twitter." *Smithsonian.com*. December 27, 2017. <https://www.smithsonianmag.com/smart-news/library-congress-will-stop-archiving-twitter-180967651/>.