Integrated Assessment for Informed Collection Management: Piloting a Long Term Collection Assessment Plan

Michael E. Luther, Kennesaw State University
Ana Guimaraes, Kennesaw State University
**Integrated Assessment for Informed Collection Management**

**Piloting a Long Term Collection Assessment Plan**

**Ana Guimaraes**  
Project Co-coordinator  
Collection Development Librarian

**Michael Luther**  
Project Co-coordinator  
Assessment Librarian

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**Phases of the Cycle**

**Phase One: Data Collection**
- Summer
- Inventory
- Circulation & Holdings
- ILL / GIL
- Expenditure Reports

**Phase Two: Review**
- Fall Semester
- Collection Assessment Reports
- Faculty Surveys

**Phase Three: Weeding**
- Spring Semester
- Librarian-recommended Withdrawal Lists
- Weeding Projects
- Catalog Cleanup
- Book Repairs

**Assessment**
- Consultation with Program Participants
- Project Review & Revision
- Survey Critique by Sociology Faculty

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**Multi-method Assessment**

<table>
<thead>
<tr>
<th>User-based</th>
<th>Collection-based</th>
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<tbody>
<tr>
<td>Quantitative</td>
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<tr>
<td>Interlibrary loan / GIL statistics</td>
<td>Collection size and growth</td>
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<td>Circulation</td>
<td>Expenditure ratio measures</td>
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<td>LibQUAL+</td>
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<td>Qualitative</td>
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<td>Faculty opinion survey</td>
<td>List checking</td>
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<td>Librarian evaluation</td>
<td>Inventory</td>
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<td>Commercial products</td>
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**Goals & Objectives**

**Goal #1: Know the collection**
- Objective 1 – Compare LC ranges to teaching and research needs of KSU
- Objective 2 – Evaluate LC ranges to determine collection strengths/weaknesses
- Objective 3 – Record strategic collection metrics over time to track progress

**Goal #2: Inform collection maintenance**
- Objective 1 – Improve selections by Undergraduate Faculty Liaisons
- Objective 2 – Improve withdrawal process by Undergraduate Faculty Liaisons

**Goal #3: Increase collection vitality**
- Objective 1 – Drive resource use based on strategic acquisition and withdrawal
- Objective 2 – Provide access to seminal works in each field
- Objective 3 – Rectify inaccurate catalog holdings records
- Objective 4 – Identify missing titles

**Goal #4: Share collection assessment results**
- Objective 1 – Report findings to academic departments to foster partnerships
- Objective 2 – Report findings to KSU administrators

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**Project Coordinator Responsibilities**

- Act as conduits for information among all project participants.
- Coordinate data flow in Phase 1, in collaboration with Heads of Access, Virtual, and Technical Services, and other staff.
- Provide orientation and training for Liaisons in Phase 2, in collaboration with Liaison Coordinator (one orientation, and 2 Lunch and Crunch sessions in fall semester).
- Coordinate withdrawal project(s) in Phase 3 with Liaisons, Head of Access Services, Head of Technical Services, and other designated staff.
- Troubleshoot as required.

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**Resources & Responsibilities**

**Access Services**
- Interlibrary Loan and GIL staff to provide data from previous fiscal year’s loans and requests.
- Collection inventory.
- Weeding projects.

**Graduate Library**
- Graduate Librarians to consult with Undergraduate Faculty Liaisons on Assessment Reports and withdrawal recommendations.

**Technical Services**
- Acquisitions to provide expenditure data by subject fund code and number of titles ordered.
- Post-assessment catalog cleanup.
- Book repairs, as needed, for identified damaged titles.

**Undergraduate Faculty Liaisons**
- Collection Assessment Reports by subject area.
- Recommended withdrawal lists.
- Top databases and journals lists.

**Virtual Services**
- Reports on Catalog holdings and Circulation.
- Student enrollment figures from previous Fall semester.
- Bowker Book Analysis annual uploads.

**Tools**
- Microsoft SharePoint™ for project and data management.
- Barcode scanners and software to facilitate inventory.
- Access to OCLC holdings.
- Bowker Book Analysis System™.

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**Pilot Year Challenges**

- Acquiring data in a timely manner and in the proper format.
- Conforming Liaison subject areas to LC ranges.
- Inventory schedule.

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**Future Plans**

- Expansion to other subject areas.
- Adding eBook usage statistics.
- Peer comparisons using OCLC Worldshare Collection Evaluation™.
- Incorporate in-house use statistics.