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

Ana Guimaraes, Kennesaw State University
Michael E. Luther, Kennesaw State University

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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

Project Abstract

In June 2015, the Kennesaw State University Library System launched a pilot implementation of a Collection Assessment Plan. The plan follows a 5-year rotating schedule for systematically reviewing print holdings of KSU Libraries.

Collection assessment is best employed when fully integrated into workflows and procedures and distributed among staff who make decisions about selection and withdrawal. The plan provides structure for improved decision-making and strategic collection growth. Recognizing that no single assessment is sufficient, the plan investigates multiple aspects of the collection, including use, patron perception, holdings analysis, areas of existing need, core title list comparisons, and peer benchmarks.

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

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

Multi-method Assessment

User-based
- Interlibrary loan / GIL statistics
- Circulation
- LibQUAL*

Collection-based
- Collection size and growth
- Expenditure ratio measures

Quantitative
- Faculty opinion survey
- Librarian evaluation

Qualitative
- List checking
- Inventory
- Commercial products

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™.

Resources & Responsibilities

Pilot Year Challenges

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

Future Plans

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

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.