Realize Your Assessment Dreams

Practical Strategies for Making Collection Analysis a Reality

ASERL WEBINAR | MARCH 22, 2021
Welcome!

WELCOME!

ASERL Webinar:
What is
“Good Enough Collection Assessment?”
February 9, 2016

TODAY’S PRESENTER:
MADELINE KELLY – Head of Collection Development, George Mason University Libraries

THE COMPLETE COLLECTIONS ASSESSMENT MANUAL
A Holistic Approach
MADELINE N. KELLY
Learning Outcomes

► Gain practical strategies for collection assessment
► See strategies in action in three example projects
► Learn where to find easy-to-apply methodologies
► Ask questions or share assessment tips and tricks
Guiding Principles
Guiding Principles

Be Purpose-Driven
Guiding Principles

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Start Small

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Guiding Principles

Be Purpose-Driven

Start Small

Plan Ahead

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- Be Purpose-Driven
- Start Small
- Plan Ahead
- Be Realistic
Guiding Principles

Be Purpose-Driven
Start Small
Plan Ahead
Be Realistic
Think “Good Enough”
Guiding Principles

Be Purpose-Driven  Start Small  Plan Ahead

Be Realistic  Think “Good Enough”  Stay Sustainable

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1. Subject Snapshots
   (George Mason University, 2013-2017)
Principles in Action: Three Case Studies

1. **Subject Snapshots**  
   (George Mason University, 2013-2017)

2. **E-Resource Scorecards**  
   (Virtual Library of Virginia, 2016-2017; Western Washington University, 2019-2021)
Principles in Action: Three Case Studies

1. Subject Snapshots
   (George Mason University, 2013-2017)

2. E-Resource Scorecards
   (Virtual Library of Virginia, 2016-2017; Western Washington University, 2019-2021)

3. Monograph Acquisitions Pilots
   (Western Washington University, 2020- )
Subject Snapshots

Define the scope

Gather the data

Document results

- Peer comparisons
- ILL statistics
- Circulation statistics
- User surveys
- WorldCat holdings
- Bibliographies
Subject Snapshots

**Be Purpose-Driven.** Exploration! Broad goal = flexible assessment. Pick tools and metrics that appeal.

**Start Small.** Test drive with a trio of subjects, then proceed one at a time.

**Plan Ahead.** Develop menu of tools, instruction manual, and schedule.

**Be Realistic.** Commit to 1-2 subjects at a time, 3-5 per year. Jettison tools and metrics that exceed bandwidth or skill level.

**Think “Good Enough.”** Deploy a variety of tools and metrics. Move on if “perfection” is too time-consuming.

**Stay Sustainable.** Drop tools and metrics that take too much time without yielding actionable results.
E-Resource Scorecards

- Develop criteria
- Complete scorecards
- Usage and pricing
- Privacy policies
- Course reserves
- DRM and user limits
- Availability through ILL
- Qualitative feedback
- Revise the process
- Tweak cancellations

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Be Purpose-Driven. Adding or dropping subscriptions. Tools and metrics capture “value” of subscriptions. Project should be cyclical.

Start Small. Just subscriptions. One year at a time.

Plan Ahead. Map out renewal cycles and academic calendar. Consult with stakeholders. Develop criteria early.

Be Realistic. Only criteria that are feasible. More challenging data gathered every other year.

Think “Good Enough.” Variety of tools and metrics. Supplement quantitative data with qualitative input.

Stay Sustainable. Drop—or space out—labor-intensive metrics.
Monograph Acquisitions Pilots

1. Plan demand-driven acquisitions for specific needs
2. Implement approval plan for high-demand areas
3. Assess allocations for prospective collection development

document
Monograph Acquisitions Pilots

**Be Purpose-Driven.** Each pilot focused on specific monographic need (student need; specific faculty need; prospective collection development).

**Start Small.** Each pilot focuses on a specific need, lasts a specific span of time, and is allotted only a portion of the monograph budget.

**Plan Ahead.** Each pilot mapped out in advance.

**Be Realistic.** Pilots launched one at a time. Given multiple years to take effect, plus additional time for assessment.

**Think “Good Enough.”** A small pilot is better than nothing.

**Stay Sustainable.** One pilot at a time. Think critically about things like slips and large allocations.
Actionable Assessment Resources

- **Subject Snapshots**

- **E-Resource Scorecards**
  - VIVA Value Metric Task Force [https://vivalib.org/va/collections/vmtf](https://vivalib.org/va/collections/vmtf)
    - Determining Value: The Development of Evaluation Metrics for Shared Content
    - Valuing Consortial Resources: A Framework for Assessment
General Resources

- **Collections Assessment: Developing Sustainable Programs & Projects** (Kelly & O'Gara 2017)
- **The Library Assessment Cookbook** (ed. Aaron Dobbs)
- **Academic Library Value: The Impact Starter Kit** (Megan Oakleaf)
Questions?
Tips?
Thank you!

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