‘Good Enough’
Applying a Holistic Approach for Practical, Systematic Collection Assessment

ASERL Webinar, February 9, 2016

Madeline Kelly
Head, Collection Development
George Mason University Libraries
Agenda

Collection assessment basics
Obstacles to collection assessment
Holistic or “good enough” assessment: what is it?
Holistic assessment @ Mason
Successes
Moving forward
Questions
Goals of Assessment
Collection Assessment Basics

Goals of Assessment

- identifying strengths
- accreditation
- showing ROI
- space savings
- identifying gaps
- cost savings

contact: mkelley25@gmu.edu
Collection Assessment Basics

Tools & Methods
Collection Assessment Basics

- list-checking
- usage analysis
- citation analysis
- user responses
- external standards
- quantity

Tools & Methods
Barriers to Systematic Assessment
Barriers to Systematic Assessment
Barriers to Systematic Assessment

![Staff](staff.png)

![Time](time.png)
Barriers to Systematic Assessment

- Staff
- Time
- Tools
Barriers to Systematic Assessment

- Staff
- Time
- Turnover
- Tools
Barriers to Systematic Assessment

- Staff
- Time
- Turnover
- Scope
- Tools

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The Holistic or “Good Enough” Approach
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Multi-tool approach
Snapshot of each subject area
Big picture perspective
The Holistic or “Good Enough” Approach

Multi-tool approach

Snapshot of each subject area

Big picture perspective

Emphasis is on usable results, not perfect results
Benefits of Good Enough

Flexible
Benefits of Good Enough

Flexible
Manageable
Benefits of Good Enough

Flexible

Manageable

Sustainable
Holistic Assessment @ Mason

Key aspects of our approach:

Subject-specific assessments
Tiered portfolio of tools
Consistency
Subject-Specific Approach

One subject at a time
Minimal burden on subject librarians
Opportunity to revise procedures

George Mason University Libraries

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The Tools & Structure

Tier 3: Advanced

Tier 2: Mid-Level

The Tools & Structure

Tier 3: Advanced

ILL statistics – Citation analysis of key journals
- E-journal usage – Database usage – Survey of faculty – Survey of graduate students

The Tools & Structure

Citation analysis of monographs – Accreditation guidelines

ILL statistics – Citation analysis of key journals – E-journal usage – Database usage – Survey of faculty – Survey of graduate students


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A Consistent Process
A Consistent Process

standardized procedures, document formatting, and file names
A Consistent Process

standardized procedures, document formatting, and file names
detailed documentation
A Consistent Process

- standardized procedures, document formatting, and file names
- detailed documentation
- cycle of assessment and revision
Nine complete, four in progress
Results @ Mason

Nine complete, four in progress
Reasonable amount of staff time
Results @ Mason

Nine complete, four in progress
Reasonable amount of staff time
Acceptable pace
Results @ Mason

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Concise final reports
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Concise final reports
Lots of usable data
Results @ Mason

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Concise final reports
Lots of usable data
Gradually accumulating results

Assessment Report: FRSC

Liaison:
Dates Assessed: April 2014 – May 2014
Extent of Assessment: Intermediate

Goal Collection Level1: Level 3C: Advanced Instructional Support
Collection Level Based on Assessment2: Level 3C: Advanced Instructional Support

Subject/Program Scope: Forensic science is the application of scientific principles and techniques to the legal process; encompasses many fields and disciplines. Includes forensic laboratory testing, criminal proceedings, forensic chemistry and biology, trace analysis, physical evidence analysis, professional ethics, and quality control.
Curriculum: B.S. in Forensic Science; M.S. in Forensic Science; Minor in Forensic Science; Graduate Certificate in Forensics
Size of Program:
   Faculty: 6 full-time faculty; 5 adjunct faculty
   Graduates are full 2013 B.S. in Forensic Science; M.S. in Forensic Science; B.S. Graduate Certificate in Forensics

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Results @ Mason

Nine complete, four in progress
Reasonable amount of staff time
Acceptable pace
Concise final reports
Lots of usable data
Gradually accumulating results
Success in revising procedures
Results @ Mason

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Reasonable amount of staff time
Acceptable pace
Concise final reports
Lots of usable data
Gradually accumulating results
Success in revising procedures
Accommodates turnover
Barriers Revisited

- Staff
- Time
- Turnover
- Scope
- Tools
Barriers Revisited

Requires 1 FTE
Low burden on subject librarians
Statistical expertise not required

TIME

SCOPE

TURNOVER

TOOLS

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- Completed 3 during pilot year
- Completed 6 in second year
- Pace accelerating

SCOPE

TURNOVER

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SCOPE

Multiple tools allow for “triangulation”
Problematic tools can be dropped

TURNOVER

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Transitioned from staff to GA back to staff again

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Each subject is a manageable chunk
Key subject areas can be prioritized
Goals can be adjusted over time
No pressure for each tool to be perfect

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Completed 6 in second year
Pace accelerating

Multiple tools allow for “triangulation”
Problematic tools can be dropped
Post-Script
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What do you do when institutional priorities change?
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Less money to fill collection gaps
Post-Script

What do you do when institutional priorities change?

- Less money to fill collection gaps
- Fewer staff to do essential work

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Post-Script

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- Fewer staff to do essential work
- Focus on efficiency, not exploration
Post-Script

What do you do when institutional priorities change?

Less money to fill collection gaps
Fewer staff to do essential work
Focus on efficiency, not exploration

Time to rework the goals, tools, and methodology
There are still adjustments we want to make – big ones!
Bottom Line

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Fortunately, our methodology allows for that.
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Fortunately, our methodology allows for that.

Best of all, we’re getting in the habit of viewing our collections more critically.
Thank you!

I’m happy to answer any questions now or via e-mail.

I’m also happy to share portions of our methodology, templates, and documentation with those who are interested in the holistic approach.