SPEC Kit 352
Collection Assessment
September 2016

ASSOCIATION OF RESEARCH LIBRARIES

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Introduction

The purpose of this survey was to determine how collection assessment methods, measures, and practices are currently employed and how the results are used at ARL member libraries. Despite recent prognostications of radical changes in form and function of libraries (Taiga Forum, 2014), the center of any current library (physical, virtual, or hybrid) is its collection. There have been notable changes in collection development, management, format, distribution, organization, and accessibility of these collections, but the collection remains at the center of librarianship (Bullis & Smith, 2011; Lehman, 2014). Indeed, because of these changes and the corresponding predictions of radical transformation of library collections (e.g., reduced physical collections, on-demand purchasing, just-in-time collection building, etc.), collection evaluation, analysis, and assessment will be needed to manage these activities that are much more complex than traditional selection.

Librarians have always cared about the quality of their collections (Johnson, 2009; Mosher, 1984), but formal methods of evaluation or assessment have developed primarily from the middle of the last century. Most complex and discussed among these has been the Conspectus method, but other methods developed include White's Brief Tests (White, 2008), circulation and usage analysis (Adams & Noel, 2008; Hughes, 2012), and citation analysis (Hoffmann & Doucette, July 2012; Kohn & Gordon, 2014; Wical & Vandenbark, 2015). While there have been many articles describing these methods and case studies of assessments of specific collections, there have been few surveys of assessment or evaluation practices actually used in libraries.

This survey was developed to better understand and to clarify the processes, procedures, and approaches used by research libraries related to collections data collection, analysis, and reporting. The survey was distributed to the 124 ARL member libraries in May 2016. Seventy-one responses were received by the June deadline, providing a 57% response rate. Although all 71 respondents indicated that data collection and analysis are integral to collection management, the practices they use vary widely.

The assessment of collections involves both the collecting of data and the analysis of that data. Because the processes for these activities may be distinct or converged, depending on the institution, survey questions addressed each activity separately. Attention was paid to the positions of individuals involved in collection evaluation, analysis, assessment, and data gathering because these processes involve numerous individuals.

Collection Assessment Process

All but two of the responding institutions indicated that they gather collections-related data above and beyond what is required by the annual ARL, ACRL, and IPEDs statistics surveys, with over half doing so on a regular basis, and nearly 40% on a project basis. The most common types of other data gathered include usage and cost data for evaluating resources, and holdings, usage, and expenditures related to subject-based collections. Other categories of data reported include Web analytics (e.g., Google Analytics, EZproxy logs, search logs), analysis of interlibrary loan (ILL) requests to assess needs or gaps, usage patterns (e-resources, circulation, digital repository usage), and citation analyses.

Assessment of library collections (versus the gathering and reporting of data) is also an integral aspect of collection management. Nearly two-thirds of the respondents currently have a process (formal or informal) for regularly assessing library collections, and another 30% are in the process of developing one. Only three institutions reported no process for regular assessment or any intent to implement one, primarily due to insufficient staff, or to lack of time, technical infrastructure, or perceived value. Collection assessments and evaluations are conducted by most respondents annually and/or as needed. A few respondents evaluate "continuously," semi-annually, quarterly, or monthly. About half of the respondents indicated no limit to the scope of their evaluations, another 20% limit the scope by format and subject, and 13% limit their scope to selected formats. The respondents' comments regarding the scope of collection evaluations indicate that the evaluations are conducted at varying levels and only for subscribed resources.

Responses concerning the formats and collections included in evaluations indicated that this question was not clearly stated. Based on the comments, it is clear that the verbiage used for format and collection were neither well defined nor differentiated. For the purposes of this analysis, therefore, the responses to the questions concerning *format* and *collection* were merged. It was clear that all respondents have included online resources and all but two have included print materials in their evaluations. Additionally, close to two-thirds have included audiovisual materials or resources, and about half included microform and other physical materials such as government documents, music scores, and open access resources.

Serials and/or monographs—regardless of format—were evaluated by nearly all respondents, followed by demand-driven acquisitions (DDA). Nearly half the respondents have evaluated their government documents collections, while a third have evaluated their open access resources or their archives. Interestingly, eleven respondents (16%) selected all of the options, indicating comprehensive assessment. Conversely, six respondents had only evaluated journals and monographs, and four respondents selected only one collection.

Locus of Data Collection and Analysis

At what levels do libraries collect and analyze the data?

An important goal in conducting this survey was to understand the extent of human resources devoted to collection assessment. Of the 67 respondents who answered the admittedly complex series of questions regarding locus of data collection and analysis responsibilities, most indicated that both data collection and analysis are done at each and every library level: local, system, consortial, and shared collections. However, as the levels broadened, the difference between the number of respondents who *collected* and those who *analyzed* at that level increased. While most of those who analyzed data at the local library level also collected that data, there were fewer who collected the data that was analyzed at the more expansive levels.

The local library is the predominant level for library collection data collection and analysis, as reported by more than three-quarters of the responding libraries. The responses for collection and analysis activities were fairly evenly distributed between the four levels, with the top three levels consisting of the local library, the library system, and the library consortium. Only 15 of the 67 respondents (22%), however, collected and analyzed data at the local, system, *and* consortial levels.

How centralized or de-centralized are the responsibilities of data collection and analysis?

Of particular interest is the structure of data collection and analysis, the *who,* of *who is doing what* aspect of data collection and analysis. It is clear that most libraries distribute the responsibilities across individuals, departments, and committees. While there were a wide variety of organizational structures reported, the typical structure is decentralized, with separate committees or groups handling data collection and analysis.

Of the 41 respondents (61%) who *separate* the responsibilities for the collection from analysis of data, the organizational structures are consistent for both tasks. Generally, about 40% of these libraries reported that separate committees are responsible for data gathering, and these committees most often involve librarians and staff from two or more departments. Committee names, if provided, were fairly generic, including "Collections Team," "Program Management Center," and "Collections Steering Committee." The number of people composing these committees ranges from fewer than five to more than 40, with committees for data analysis being two to three times larger (4–40 members) than those for data collection (2–18 members). Most committees are composed of about 10 members for data analysis and between five and 10 members for data collection. Those committees responsible for *only* data collection are composed mostly, if not wholly, from collections management. Some of these also include the assessment analysts or librarians. Conversely, most committees that focus on *analysis* include subject or liaison librarians and others outside of collections.

About a quarter of the libraries centralize the data collection and/or analysis responsibilities, about half of which are concentrated in a single department with about three staff members devoted to each responsibility; the other half are handled by a single position. Finally, over a third of these 41 respondents indicated other organizational structures, most of which are some combination of collections and subject librarians.

Twenty-six respondents (39%) indicated that the same individual, department, or committee handles data collection and analysis. Of these, four reported a single person. Position titles for these individuals are "Collection and Organizational Data Analysis Librarian," "Collection Assessment and Analysis Librarian," Collection Management Librarian," and "Collections Strategist." At three libraries collection departments with 2–8 staff members are responsible for assessment. At 11 libraries (42%) data gathering and analysis responsibilities are centralized in a committee, with an average of six members (range: 3–12). In over two-thirds of these committees half of the members are from collections. Interestingly, only three committees with centralized data collection and analysis responsibilities include an assessment librarian.

Commitment of Human Resources Toward Data Collection and Analysis

Our other major concern regarding human resources was the extent of effort or time devoted to collection assessment. As expected, libraries that centralize the responsibilities of gathering and/or analyzing data into a single position devote a greater proportion of that individual's time (59%) towards these activities than those that use a single department (45%). However, those that use a department devote an average of 1.4 FTE towards these activities.

Most committees meet monthly, but a few meet as frequently as weekly and others only as needed. Only eight respondents provided estimates of time committed to these activities and these varied widely, from fewer than 50 hours to more than 2000 hours per year for collecting the data, and from 20 to 200 hours for analyzing data. Extrapolating these estimates across all committee members, these libraries devote an average of 2.4 FTE to collection assessment.

Purposes of Collection Assessments

In the survey, we asked about purposes of *initiating* assessments, as well as how completed assessments were *used*. These are not always one-in-the-same, and we were expecting assessments used for more purposes than those initiated.

As expected, nearly all respondents indicated that collection assessments were initiated for reasons associated with collection development, followed by library administration or other library purposes. Academic reviews, whether for accreditation, new programs, or institutional purposes, were also common purposes reported. Initiating development of a shared collection was selected by nearly half, while just over a third indicated that collection evaluations were initiated to *evaluate* a shared collection. The most commonly mentioned other reasons include moving collections or space re-allocation (n=8), other external reporting (n=5), budgetary purposes (n=8), and weeding or de-selection (n=4). Intriguing comments include "understanding user behavior," "answer questions from departments about library funding and acquisitions," and "maximizing our utility."

Nearly every respondent has used the collection evaluations for the selection of materials for moving, weeding, and/or de-selection (cancellation). More than two-thirds have used the evaluations to demonstrate value and/or justify funding increases to library or campus administration, as well as to evaluate collection strengths and weaknesses, and to adjust allocations of funds. Other uses reported by the majority of respondents include accreditation, estimating costs of upgrading or new collections, and identifying core works. We were impressed by the number of respondents who have used the evaluations for comparison with their peer libraries.

Fewer than half of the respondents have used evaluations to demonstrate the value of the library to patrons, develop or manage a shared collection strategy, or target collections for promotion and/or digitization. Only 12 indicated that the results have been used to evaluate selector effectiveness. Other uses include preservation, promoting faculty outputs, identifying patron interests, determining a strategic use of space, and examining expenditures by format over time.

Data Collection Tools, Methods, and Frequency

For our survey, we were interested in discovering the data collection tools that are used and the frequency of their use. The survey asked respondents to indicate which of 13 software and online services their library has used for storing and analyzing data for collection evaluation purposes and any that they would be interested in using in the future. Respondents reported using, on average, five tools and being interested in using one tool, though one respondent reporting using 11 tools. It should be noted that only 24 of the respondents (36%) identified tools that they were interested in (but had not yet used), suggesting that librarians are taking the initiative and applying the tools they need.

Not surprisingly, all respondents use spreadsheets for analyzing data. The use of database programs or servers was greater than the authors expected—45 respondents (68%) use Microsoft Access, a database server, or both (nearly a quarter of respondents have used both). Most of the remaining options have been used by between a quarter and a third of the respondents.

Over 80% of the respondents have either used or are interested in using data visualization tools like Tableau. Between a third and half are either using or interested in using most of the tools, with databases, spreadsheets, and visualization receiving the lion's share of responses. A moderate number of respondents expressed interest in using SpringShare's LibAnalytics and/or statistical software like SPSS.

Interestingly, 18 respondents indicated that they have used a "system developed locally/in-house." Data storage systems were the most common solutions listed by these respondents, but the underlying foundation of these varied from spreadsheets to relational databases to more sophisticated data warehouses. They reported storing a variety of data, including e-resource usage, expenditures, and journal holdings and/or overlap. The emphasis of these local data systems appears to be on integrating data from multiple sources. Web or proxy server logs were also mentioned.

Most respondents indicated that data is collected annually, with only about a third reporting that data is collected monthly or quarterly. The most commonly reported other frequency was "as needed" or "ad hoc," usually reported in addition to the other frequencies. The data that librarians need for collection evaluation is generally directly accessible. Just over one-third reported that most of the data, and another third reported that some of the data, is accessible. Another 11 respondents reported that the data is accessible upon request, and only four reported that some data is not accessible at all. Among the other responses, a distinction was made with *ease* of access.

Data Collection Dream Tools

The purpose of this question was to stimulate the development of tools not already available or created. In retrospect, this question could have been phrased more clearly, as some of the responses (8 of 42) were for tools that already exist, e.g., any ERM, the WorldShare CAS, Greenglass, and Tableau. Of the expected responses, 17 were for improvements to existing systems, primarily the integrated library systems and the resource usage tools. The requested improvements centered on ease of use and integration with other data, notably cost and print usage. Also requested were improvements in generating reports and the ability to analyze data at levels that are higher (e.g., consortial) and lower (e.g., patron groups) than the individual library. Of the responses that could be considered "dream tools," the key concern was for data aggregation and integration, between and within systems. Some responses were very general:

> "It would blend financial and usage data in an accurate, useful, actionable way and would be open source and scalable to consortial/shared activities."
>
> "Internal database to allow all collected data to be in one place and have the ability to run reports and combo reports to have a better 'big picture' of what data is collected, allow efficiency, and help expedite the annual reporting."
>
> "Allow data aggregation and analysis from disparate data collection systems."

Others requested specific combinations, notably for the aggregation of e-resource usage data, print circulation, and expenditures. It is clear that the respondents were requesting data management and analysis tools that brought together data to answer questions related to collection coverage, usage, and efficiencies. This requires bringing data out of the silos and integrating the counts of titles and/or volumes, records of usage, and costs. There were two suggestions that were quite different from the others:

> "Would be great if our automated monitoring systems (gate counters, environmental monitors) would auto-report to a server."
>
> "A tool that scrapes bibliographic information from grant proposals, faculty annual reports, materials in the institutional repository, course management sites, etc. but that allows for anonymity."

Data *Analysis* Methods and Frequency

Our survey asked respondents to indicate the use or interest in using a myriad of measures and methods for collection analysis. These were organized into the four categories in the key textbook, *Fundamentals of Collection Development and Management* (2nd ed.) (Johnson, 2009), and adapted here:

Type of Measure	Use/User-based	Collections-based
Quantitative	Circulation In-house usage ILL/document-delivery E-resource usage Cost-per-use	Number of titles & volumes Growth in size Expenditures and trends Citation analyses Ratios (e.g., size to expenditures, print to electronic)
Qualitative	Observation studies of user behaviors Surveys of opinions Usability testing Focus groups	Citation analysis List-checking Collection mapping (e.g., Conspectus) Brief tests of collection strength Peer-comparisons

(Figure 7-1 Methods of collection analysis, p. 229)

Quantitative collections-based measures or methods are the most commonly used in collection evaluations, with nearly three-quarters of the survey respondents having used three or four of the methods at least once. They most frequently reported using these methods at least annually, except for analyzing the collection's currency, which had been done as needed, though a surprising number (15 or 24%) indicated that they had never analyzed collection currency or age. The vast majority of the respondents analyze collection growth and expenditures annually or even more frequently. Most analyze the collection size by subject and/or format annually or as needed.

While the responding libraries have used qualitative measures of the collection, they are not necessarily a *regular* part of collection evaluations for most respondents, nor is the use of these methods widespread. While over three-quarters have used accreditation guidelines, and nearly two-thirds have used peer library comparisons, global citation analysis, list-checking, or direct evaluations, nearly two-thirds of respondents have never used the Conspectus or Brief Tests of Collection Strength methods. Indeed, "Never used" was *the most* or the *second most* selected response for *all* qualitative collection-based methods. While over half of the respondents indicated they have used four or more of the eight methods listed, there was greater variation in the frequency of their use. Most who use these measures applied them as needed, rather than on a regular basis. Furthermore, there was little interest in using these measures, with fewer than a third of the respondents indicating any plans to use these methods, primarily global citation analysis (e.g., impact factor) and comparisons of holdings with peer-libraries.

There was similarly wide variation in the use of the quantitative user-based measures for collection evaluations, with most respondents reporting using between four and six methods. Generally, the more traditional measures of circulation and ILL requests by user groups are used annually, as well as usage of electronic resources (which was the most commonly reported method). Conversely, gap analysis and MINES for Libraries® have never been used by the majority of respondents. Most of the measures are used either annually or as needed. Unlike the other groups, nearly half of the respondents indicated plans to use one to three of these methods. Local citation analysis was the most commonly selected method that respondents are planning to use, followed by gap analysis and ILL requests by patron groups.

There was a greater response to the qualitative user-based methods than the other groups of methods, with nearly 75% reporting using three or more of the methods at least once. This explains the fewer number of respondents who indicated that they are planning to use at least one of the methods. The two key exceptions are the comparison of syllabi to holdings and the mapping of courses to the collection, both of which are very labor-intensive. However, a modest number of these respondents are planning on using these methods (10 and 18, respectively). Most gather feedback from the primary stakeholders (patrons and librarians) on some kind of regular basis, about a third reported doing so more frequently than annually.

Only fourteen respondents reported other methods, many of which were variations on those listed in the survey questions. For example, respondents rank journals by usage, by faculty perception, and by global citation analysis. Almost all of the projects described include some aspect of usage, many focusing on format such as e-books, journals, or print monographs. It is clear that usage has become the prominent, if not the most important, measure for collection assessment.

The commercial collection analysis tool used by the most respondents (currently, previously, or interested in using) is the YBP Gobi Peer Groups, followed closely by the OCLC Collection Evaluation/Analysis System and the ProQuest Intota Assessment. The Bowker Book Analysis had the most "never used" responses. GreenGlass (aka Sustainable Collections Service from OCLC) was the most commonly mentioned other tool that respondents are *currently* using. Other systems include data management & visualization tools (e.g., Cognos and Tableau), usage data management, overlap analysis tools, Ulrich's Serials Analysis, and UStat.

Interestingly, only eight respondents (13%) have used freely available data, most notably ARL and IPEDS statistics. Other data sets mentioned include CUFTS (for database overlap), the Scopus Journal Metrics (Source Normalized Impact per Page (SNIP), Impact per Publication (IPP), and SCImago Journal Rank (SJR)), and the WorldCat Expert Search feature to compare holdings.

Collection Assessment Results Dissemination

Audience for and Format of Reports

We were interested in learning how libraries disseminate their collection assessment results, both the formats and the audiences, essentially, "who *gets* what." Not surprisingly, those internal to the library are the most common recipients of information (over 90%), with library administration, collection managers, and subject specialists receiving slightly more responses than other library staff. There is a notable drop in the number of responses for the next cluster, institutional administration or oversight (roughly 70–80%), while about half make their information available to the general public. Only a few respondents reported other audiences, and these tended to be funders and alumni.

Print or PDF reports and in-person presentations are the most commonly used formats for sharing data (60 respondents each or 92%) across all constituent categories. Many respondents (51 or 79%) disseminate these files through the library intranet (primarily to library staff) and 32 (49%) use the public website (for a broader audience). By far, the institutional repository is the least used mode for disseminating collection assessment results; only five respondents selected this option. While almost all of the respondents share assessment data through written reports and presentations/slide-shows that include charts and graphs, only 29 respondents reported using interactive visualizations/dashboards to represent their findings.

Another purpose of this survey was to determine the accessibility of the summary or raw data gathered for collection assessment purposes. The goal was to determine the data sharing environment of the ARL respondents; 63 responded to questions pertaining to summary data and 58 responded to questions pertaining to unprepared/raw data. Most of the respondents (41 or 65%) indicated that stakeholders have either direct access or access upon request to summary collections evaluation and assessment data. Another 18 (29%) provide more limited access to the summary data, and only three indicated that most summary data is not accessible at all. Twenty-two respondents (38%) reported that most raw data is accessible upon request and an equal number reported that some data is accessible. Eleven (19%) indicated that raw data is not accessible at all.

Collection Assessment Outcomes

We were very interested in learning the outcomes of collection assessments, as well as what collection assessment challenges libraries face. The top two results of collection assessment have been an increased understanding of the scope and breadth of collections by librarians and changes to collection development policies or priorities.

In terms of more objective forms of outcomes, nearly two-thirds experienced an increase in funding targeted to building or enhancing a collection, and more than a third indicated that funding for overall collection development had increased as a result of collection assessment reports. A smaller set of respondents (18 or 28%) indicated that they had changed their funding algorithms or formulas as a result of collection assessments.

As expected, collection assessment outcomes serve a variety of purposes specific to collection management, including supporting shared collecting initiatives with partner libraries, informing funding and collection development decisions, de-selection and weeding practices, and changing approaches to approval plan initiatives.

Challenges

Respondents were asked to describe the top three challenges encountered at their library when assessing collections. This question was purposefully open-ended to generate the most comprehensive list and 54 respondents described challenges that fell into seventeen broad thematic categories:

Challenge	Responses	%
Consistency and quality of data	31	23%
Staffing, time, or cost constraints	27	20%
Expertise issues	20	15%
Data integration	15	11%
Data acquisition	13	9%
Communication	8	6%
System and/or hardware deficiencies	7	5%
Organizational culture	7	5%
Volume of content to be assessed/overwhelmed	5	4%
Application	4	3%
Grand Total	137	100%

Issues with data acquisition, integration, consistency, volume, and quality were the most commonly cited challenges, accounting for close to half of those reported. Data were also mentioned in other categories, including being overwhelmed, system deficiencies, and expertise issues. It is clear that librarians are frustrated by the lack of consistent data and standards, as well as the inability to integrate the myriad of systems easily. Typical comments included:

> "Messy data. Oftentimes, the data that is used to inform assessment decisions is messy, inconsistent, problematic, and full of caveats."

> "Data over time is difficult, since we have changed the ILS a number of times, and not all data was migrated, and querying the underlying database must be done in another fashion."

> "Not having good benchmarking data for meaningful comparisons."

The other major sets of issues are with resources, or lack thereof. These may be lack of staff, time (which could also be considered lack of staff), financial resources, and expertise. These represent at least 35% of the challenges, given that they could also apply to the issue of being overwhelmed and some of the data issues. Typical comments included:

> "Resources to encourage an expectation of assessment, this includes personnel and collaborating across teams."

> "There are an overwhelming number of resources to evaluate and a lack of staff coordination, time, and interest."

Expertise issues, communication, and organizational culture are also major concerns, representing 20% of the challenges reported. Some of the challenges of expertise are technical, focusing particularly on data (analysis, manipulation, etc.), but most are conceptual. Librarians are not able to make sense of the data, with several mentioning the sheer complexity of assessment. This extends into the communication challenges, specifically communicating the results and translating data and analysis for non-experts. The respondents also expressed frustration with their attempts to change the library culture to one of assessment, or even to have their work result in any changes. Typical comments included:

> "Assessment not tied to strategic goals, so recommendations not necessarily followed."

> "Administrators at the university level largely deaf to evidence of need as presented by the library."

> "We do additional work to collect data to tell the story, but it doesn't translate to additional funding; so it is worth all the work?"

Several of the challenges described were actually applications of the assessments, specifically for evaluation of the use of space and funding.

Collection Assessment Skills

Training

Staff training appears to be mostly informal and on-the-job. Fewer than half of the respondents indicated that staff have received formal training in collection assessment or evaluation. Of these respondents, two mentioned the ALCTS Fundamentals of Collection Assessment online course, but most mentioned more informal or technical training. The technical training focuses on data management and analysis. Two respondents mentioned that they are developing training programs.

Skills Ranking by Importance

Another goal of this survey was to determine the gap between the most important assessment skills and the skills that library staff are lacking. The rankings in the responses to the questions about which skills are most *important* and which skills library staff still *need* are so similar that they suggest that the respondents misunderstood the intended distinction between the questions.

Overall, analytical/critical thinking, collection assessment, and collection development principles were ranked the three most important skills. Knowledge of spreadsheet software was fourth, but database skills ranked least important. The next group of skills includes subject expertise, data management, and statistical analysis. Knowledge of the publishing industry and data visualization/chart-making skills are less important.

The open-ended responses to a question about the desired continuing education opportunities supports the idea that staff are, indeed, lacking the necessary assessment skills. Data management, critical thinking, and statistical analysis figure prominently in the educational opportunities desired. The last is paradoxical to the relatively modest rank of *importance* given to statistical analysis (average was 7th and mode was 8th). General collection assessment skills were listed next, followed by technical skills. Interestingly, two responses were focused on communication.

Collection Assessment Climate

The survey next asked respondents to indicate how well a set of statements reflected the assessment climate at their library. The three statements that received the highest ratings indicate that library administration supports collection assessment, internal stakeholders are interested in the results of collection evaluation, and collection assessment has increased at the responding libraries over the last five years. The next grouping indicates that qualitative data is the primary means of assessing collections and the results of evaluations are used to make collection development decisions, but the data is still difficult to gather. Few respondents believe that their *external* stakeholders are interested in the results of collection evaluations.

The responses to a follow-up question about general library attitudes toward assessment group more around the middle of the scale than those about the assessment climate. For example, the three most common responses to "Collection evaluations are difficult to interpret…" (2, 3 and 4) were within four percentage points (26%, 29%, and 30%, respectively). For the statement comparing the importance of quantitative versus qualitative data the middle response (3) received over half the responses (37 or 56%).

Generally, the respondents most strongly believe that libraries should share collection analyses and data (65% positive). There was also general agreement that collection evaluations should be used to adjust allocation of funding for collections (53%), and that collection assessment is supported by the theoretical foundations of collection development (51%). There was a weak consensus that collection evaluation should be centralized (46% positive and 37% neutral), and no real consensus on the difficulty of interpreting collection evaluations (fairly equal distribution across positive, neutral, and negative ratings).

Successful Collection Assessment Processes

Forty-eight respondents provided examples of successful collection assessment processes at their libraries. The most common thread reported (13 respondents) was the collection and analysis of usage statistics. This was useful for both selection (and de-selection) purposes, as well as observing longitudinal trends. The next most-common thread (11) was the use of evidence-based decision making regarding differing aspects of collection development and management, including selection and de-selection of electronic resources, the selection of resources to move to storage, and the allocation of funds to collections. Another common thread was collaboration, reported in one form or another by nine respondents. This collaboration was usually among other library staff, although two mentioned collaboration with external partners. The other successes varied from disciplinary collection assessment and data sharing to improvements to processes, negotiations with vendors, communication, and data collection. A couple of the more intriguing responses included the ability to assess interdisciplinary collections and greater support from library administrations.

Desired Change in Collection Assessment Processes

Thirty-nine respondents described aspects of their collection assessment process that they would change. The most common thread (17 respondents) related to data: quality, collection, integration, and the sharing thereof. This was often associated with the second most common thread, that of process improvement (14 respondents). Other aspects of the process needing improvement include increased staffing, staff development, planning of assessment, and improved efficiency. Interestingly, while five respondents suggested greater centralization of data collection and analysis, one respondent indicated that the subject bibliographers at that institution were invested in more responsibilities for assessment of their subject areas. Also interesting were two respondents who indicated a desire for improvements in collaboration, particularly with library staff.

Additional Comments

Most of these comments related to the unique environments of each institution. Most notably among these were comments related to staffing, or lack thereof. Several mentioned having positions for which assessment was only part of the responsibilities. The respondents believe that these "part-time" assessment librarian positions were not enough to conduct activities necessary for proper collection assessment. Several respondents mentioned efforts to encourage the adoption of collection assessment methods by the subject librarians themselves, thus decentralizing the process. Finally, there were comments related to the complexities of collection assessment which this survey may not be able to discern. Indeed, the survey itself was quite complex, yet still did enable us to refine the analysis enough to tease out the wide array of combinations of processes, data, responsibilities, inputs, and outputs. We do hope that this will provide some context from which future research may be initiated to better address these complexities.

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Survey Questions and Responses

The SPEC Survey on Collection Assessment was designed by **Karen R. Harker**, Collection Assessment Librarian, and **Janette Klein**, Interdisciplinary Information Science PhD student, at the University of North Texas. These results are based on responses from 71 of the 124 ARL member libraries (57%) by the deadline of June 7, 2016. The survey's introductory text and questions are reproduced below, followed by the response data and selected comments from the respondents.

The center of any current library (physical, virtual, or hybrid) is its collection. There have been notable changes in collection development, management, format, distribution, organization, and accessibility of research collections, but the collection remains at the center of librarianship. The distinct trend lines are towards digital, open, and collaborative (print and digital) collections. Because of these trends and the predictions of radical transformation of library collections (e.g., reduced physical collections, on-demand purchasing, just-in-time collection building, etc.), collection evaluation, analysis, and assessment will be needed to manage these activities that are much more complex than traditional selection.

The purpose of this survey is to determine whether the available methods, data, and tools are aligned with the purposes for assessing collections. It looks at which collection assessment methods, measures, and practices are currently employed, how the results are used, and how well assessment questions are answered. The results of this survey could help librarians who are involved in collection development and management, overall library assessment, and administration at research libraries to develop plans to evaluate their collections using established methods.

COLLECTION ASSESSMENT PROCESS

1. **Does your library gather any collections-related data beyond what is required by the annual ARL and IPEDS statistics surveys?** N=71

Yes, regularly	41	58%
Yes, on a project basis	28	39%
No	2	3%

If yes, which data categories are gathered for collection assessment purposes? Check all that apply. N=69

ACRL survey library collections data	50	73%
User satisfaction with the collections (e.g., LibQUAL+®)	47	68%
Open URL server statistics	27	39%
Use of materials that are not included in the library catalog (e.g., open access resources)	18	26%
Purpose of using digital resources (e.g., MINES for Libraries®)	11	16%
Other data	44	64%

Please specify the other data. N=44

Regularly N=28

Adequacy of collections to support new academic programs

Annual data calls by the institution on the collections, digitization, etc., which is used by the institution for planning, reporting to Congress, etc.

Annual report, internal reporting

CEAL statistics, subject-area assessments

Collections information is required for university program and course reviews.

COUNTER reports, usage statistics for e-books and non-journal content

E-resource usage (primarily via Intota); print circulation data, including anonymized demographics (school/department; patron status); holdings/acquisitions data for partner libraries (on a project basis)

E-book and e-resource usage data, print circulation

E-journal and e-book usage data, transactional usage data for print collections

EZproxy, demand-driven acquisitions, ILS, budgets, circulation rates, weeding data (duplicates, physical space). We also collect robust data (than reported on ARL or IPEDS) for reference and instruction, collections, finance, digital library, and interlibrary loan.

Google Analytics, COUNTER compliant usage reports

ILL data on what our users borrow at the title level

ILL data, COUNTER compliant statistics on the use of e-resources (primarily JR1, BR2, and DB1)

ILL data, qualitative data (input from users), EZproxy logs, search logs on our discovery layer, COUNTER stats, peer institution holdings, Scopus report on where researchers are editing and publishing, e-resource turnaway stats.

ILL, overlap holdings with regional partners, COUNTER from e-providers

ILLIAD data, GWLA data, circulation patterns, collection data, collections spaces (physical and virtual), IR, cost per use of e-resources

OCLC comparison analytics

On both a regular and project basis, monitor/assess changing nature of collections budget expenditures; gather data on cost, usage, and cost-per-use for e-journals and databases by specific resource and/or publisher/vendor; print book circulation statistics; and subject-specific collections metrics (including trend data); and university system mandated faculty and student satisfactions surveys

Other COUNTER reports not included in ARL, IPEDS; search query phrases in Google Analytics; resource clicks through LibGuides

Other membership-related surveys such as for the Canadian Association of Research Libraries

Project-based statistics that are dependent on the particular project, for example: the percent of users requesting material vs. those checking it out in person. We've done both LibQUAL+ and MINES, but not regularly.

Reports from Sustainable Collection Services

Turnaways, circulation, Google Analytics for web resources, linear measurements, reference/collection usage. In the latter case, this informs special collections processing, digitization, preservation.

Usage data for e-journals and databases

Usage of e-resources; circulation statistics of print resources; ILL statistics

Use of e-book DDA by user status and campus for EBL only

Vendor-supplied usage data; interlibrary loan usage data; circulation data

We regularly collect usage data to understand user demand, and combine it with cost data to help us understand the best methods for purchasing what users need.

On a project basis N=16

Analytics for Big Deal expenditures

Case-by-case data gathered for budgeting and collection development and management needs.

COUNTER usage statistics, ILS (Voyager) data on collections use

Expenditure data illustrates support for specific academic programs under review for re-accreditation. Use of materials in the catalog is included in annual reports as is use of electronic resources.

I don't remember what data is included in the ACRL survey, but we also collect use data for print and electronic materials.

Item circulation; circulation of collections; circulation by user groups; acquisition by fund; acquisition by subject area; counts of digitized items; use of digital items; etc.

JR1, usage statistics for the print book collection, expenditure data

Local user satisfaction survey; local author-published articles and books citation data

More granular circulation data (for specific collections), cost per use data, e-book use/behavior (more than just COUNTER), in-house use statistics (monographs, serials, media bookings, microforms). Currently looking into leveraging EZproxy logs.

Project-based data

Usage data: circulation statistics for non-digital materials; usage data for e-resources. ILL data. Collection comparisons through a one-time assessment using GreenGlass software; other collection assessments associated with accreditation programs and new degree programs

Usage data, citation analysis

Use data

Vendor-supplied usage data for online books, journals, databases, and media

We look at usage and cost data for collections on an as-needed basis to make purchasing decisions.

Web analytics, circulation statistics

2. **Is a process for regularly assessing library collections in place at your library? If so, is that process formal, including an established procedure with dedicated staff and other resources? Or is it informal, conducted ad hoc and with no set procedure?** N=71

Yes, a process that contains both formal and informal elements is in place	35	49%
Yes, a formal process is in place	6	9%
Yes, an informal process is in place	6	9%
Not yet, but we are working on a process	21	30%
No, process is not in place, and we have no plans to implement one at this time	3	4%

Comments N=10

Both formal and informal N=4

Collecting data for the ARL and AAHSL statistics is a formal process each year, then additional data is collected in a more informal way.

The Collection Assessment position is one year and three months old. We are formalizing more processes and procedures, but some may remain informal (i.e., weeding).

The Libraries have an internal wiki page that has some information about strategies and local procedures for accomplishing assessments.

We look at electronic usage stats before some renewals. We collect electronic usage statistics twice a year. We are working toward using the data more for collections decisions. We conduct several weeding/retention projects per year.

Formal process N=2

Monthly database renewal review in Collection Management Committee; annual serials review

We have had a formal process for reporting on collections. We now have a new Director, A.D. for Collections, and department head for Collections Strategy. We are in the process of developing new assessment practices for the new leadership.

Informal process N=2

Our intention is to develop a formal and ongoing process for collection assessment.

We receive assessment requests from individual departments on campus, typically for accreditation reports or new program proposals. Each request differs in what kind of statistics and other data are needed, so it's not possible to have a set procedure for that. Individual bibliographers sometimes conduct collection assessments in their subject areas, but this is at their discretion and not a required activity. Beyond that, I collect and ponder use statistics on an ongoing basis, and sometimes report on or take action based on findings. Thus we have common activities, but no set procedures.

Working on a process N=2

Until his retirement last year, we had a professional librarian in the position of Collections Analyst. We are currently planning a distributed model that will involve coordinated efforts of staff from various library departments (more on this below).

We have been moving toward an evidence-based model for the past two years.

If you answered "Yes" above, please continue to the next screen and complete the survey.

If you answered "Not yet" above, please complete as much of the survey as possible at this time.

If you answered "No" above, you will be directed to the section on No Collection Assessment Process.

COLLECTION ASSESSMENT FREQUENCY AND SCOPE

3. **How frequently are the evaluations conducted?** N=66

Annual review of serials subscriptions; all other evaluation is ad hoc.

Annual, and as needed

Annual, some parts ongoing, some ad hoc

Annually (8 responses)

Annually we develop collection snapshots by discipline and assess e-resource usage; otherwise as needed.

Annually and on a project basis to answer questions

Annually and on an ad hoc basis

Annually for some data surveys and reports. Others are done on an as-needed basis.

Around renewal time is the most frequent time.

As needed (4 responses)

As needed or requested

As needed to assess specific parts of the collection; annually when re-evaluating approval plans

As needed, but working toward annually

As warranted by needs for space or funding

At least once a year (2 responses)

At the moment, on an ad hoc basis. However, we recently formed a new unit and are in the process of determining an overall approach to collection assessment and evaluation that will make more regular use of data and qualitative information.

Collection of statistics is ongoing, but evaluation of them is irregular.

Continuously

Currently, have several projects in place to re-evaluate the strategic use of space needs.

Currently, evaluations are largely project-based and driven by needs around space saving and budget restrictions.

CY and FY reports

Depending on the project, yearly, quarterly, and as needed

Depends on the evaluation; some are annual or monthly, some are project-based and some are by request.

Evaluations are conducted in conjunction with program reviews carried out by the university.

Evaluations are conducted on an ongoing basis.

Evaluations are conducted on an ongoing basis. For example, a monthly content gains and losses report is disseminated, weeding evaluation is conducted as needed, and budget evaluations of collections are conducted quite often.

Evaluations are done currently on an as-needed basis. A large part of our print collection evaluation has been driven by our participation in the CIC SPR and relocating to a new offsite storage facility.

Every three years

For e-resources, at renewal time. For print collections, ad hoc.

FY basis + as needed

Irregularly and as needed

Irregularly and at different intervals for different collections

Irregularly on an as-needed basis

Irregularly

Monthly or as needed

Monthly/annually

On an ad hoc basis as subject liaisons see the need for evaluation. Examples would include reviewing e-journals subscriptions for budgetary reasons or weeding the print collection for space concerns.

Ongoing

Ongoing, annually for reports, and as needed for projects

Quarterly

Quarterly for usage data; ad hoc projects as required

Quarterly, annually, or project-specific timeline

Semi-annually or annually

Specific projects are completed about three times a year to evaluate parts of the collection.

Sporadically, based on departmental accreditation and library needs.

The evaluations are not conducted at regular intervals. We do monitor the annual statistics, but typically, we will conduct an evaluation before a renewal.

The Libraries does an annual assessment of the collection. We also conduct a periodic "gap analysis" and revise the "content strategy" based on the gap analysis. And, we conduct an annual serials review to more pointedly focus our resources to the needs of the institution.

They are conducted on an ad hoc basis, as needed.

This is a difficult question, since evaluation takes place at various levels. Some is part of ongoing selection, acquisition, and budgeting workflow. We monitor e-resource usage, track collection growth and expenditures regularly and all of this entails a level of evaluation of the content. Deeper analysis of holdings (e.g., with historical dimension) tends to be more project-based, i.e., less frequent/regular and also more subject-specific.

Varies depending on the project and data needed

Varies, some are conducted annually and some are as needed.

Various parts every year and others on ad hoc basis

Very infrequent, couple of times in the last 8 years

We annually review for preservation initiatives, including WEST and University of California Shared Print, and our contributions to University of California's Southern Regional Library Facility, and for local space planning. On as as-needed basis, usually 5–7 times per year, we evaluate our collections for proposed new graduate and undergraduate programs. As needed, usually 1–2 times per year, we provide data for the re-accreditation of individual academic programs.

We have conducted different evaluations annually for at least the past four years.

4. Please describe the scope of the collection evaluations. N=67

All formats, all disciplines or subjects, including digital collections	34	51%
Selected formats in selected disciplines	13	19%
Selected formats in all disciplines	9	13%
All formats in all disciplines, excluding digital collections	3	5%
All formats in selected disciplines	3	5%
Other scope	5	8%

Please briefly describe the other scope. N=5

All formats, all disciplines or subjects, including digital collections are being conducted but not yet formalized.

All subscribed resources, all formats, disciplines

Format-based without regard to disciplines at this time.

We have evaluated our collections on most of these levels at one time or another.

We plan to work with a vendor to better understand our physical collections in general so that we can develop an assessment plan. At the same time we intend to create a process whereby we push data for electronic resources out to our subject librarians for ongoing assessment.

5. What formats are usually included in collection reviews or evaluations at your library? Check all that apply. N=67

Electronic or Online	67	100%
Print	65	97%
Physical audiovisual (LP's, CD's, VHS/DVD's, etc.)	45	67%
Streaming audiovisual resources	45	67%
Other online resources for which the library has paid access	42	63%
Microform	38	57%
Other physical resources/materials (maps, archives, ephemera, slide sets, etc.)	31	46%
Other format	7	10%

Please specify the other format. N=7

All formats are included as needed in collection reviews and evaluations.

Film

Government documents (as per Federal Depository standards); special collections manuscripts and artifacts; musical scores

Online resources freely accessible, such as Hathi Trust

Special collections materials all formats

We most commonly include books and journals in both print and electronic format, but we have surveyed the other formats occasionally.

We will start adding other formats such as streaming AV.

6. **What collections are usually included in collection reviews or evaluations at your library? Check all that apply.** N=67

Monographs/monographic series	63	94%
Journals/Serials	66	99%
Demand-driven acquisitions, including "Discovery"	47	70%
Government documents	31	46%
Open Access resources (including OA journals, freely-available Web resources that are included in library catalog or subject guides)	23	34%
Archives	23	34%
Digital repositories	21	31%
Other collection	13	19%

Please specify the other collection. N=13

Databases (2 responses)

Demand-driven acquisitions collections, e-books, databases

Emphasis is put on evaluating our own OA resources, and our physical and subscribed resources against external OA collections.

E-resources

Maps

Microforms

Most evaluations are being conducted to address strategic space needs.

Special collections

Special collections, AV, micro collections

Use of archives and manuscripts is usually collected by our Archives and Special Collections. Use of our digital repository is usually collected by the Scholarly Communications Office.

We try to evaluate everything, but it can also be project driven—what to go into storage, what to stop subscribing to, trend lines of collection use, etc.

Within the above categories: non-English language materials, specific call number ranges, comparisons with member libraries in consortium, off-site shelving—items fall in above categories but by virtue of location have become a separate, functional collection.

LOCUS OF DATA COLLECTION AND ANALYSIS

7. Please indicate at which level library collection data is collected and at which level it is analyzed. Check all that apply. N=67

Level	Data Collected	Data Analyzed	N
Local library	57	56	58
Library system	40	33	40
Library consortium	36	29	38
Shared collection partners other than consortium	11	11	12
Total Respondents	67	65	67

8. Is library collection data collected and analyzed by the same individual or group? N=67

Yes, same individual or group	26	39%
No, different individuals or groups	41	61%

9. Please enter any additional comments you may have about the locus of data collection and analysis. N=22

Central collections staff usually analyzes the data, but sometimes subject liaisons are also involved.

CMC, Acquisitions, Special Collections, ad hoc groups of subject librarians, others

Collection data by the Collection Management Librarian, other data by the assessment team.

Data collection is done chiefly but not exclusively by senior staff in the Acquisitions Department. Specific subject liaison librarians are also involved, more often in analysis.

Data is collected and analyzed in the Libraries for program and course reviews. The Libraries is also taking part in a consortial-level project to look for overlap in collections with the idea that some monograph collections can possibly be shared.

Data is largely centrally collected. Analysis is more dispersed among units.

Data on different areas of the collection may be collected and analyzed by different groups.

Evaluation will vary by discipline, cost, format, or the way that the resource is acquired (e.g., is it cost shared with other libraries in the system, a consortial purchase).

Generally the same, but may depend on the project.

I believe that collection data is collected at our state consortial level, but our library is not involved in that, so I have no specifics.

Library assessment officer and e-resource librarian are normally primary leads but review can happen among different persons in the library.

Library communications & planning: Assessment Librarian collects data for communications and reporting to internal and external stakeholders; ACRL, IPEDs, survey collection, peer comparisons, etc. Collects some library-wide data for internal assessment and evaluation. Collections Management Team in collaboration with acquisitions collects and analyzes data for collections assessment & evaluation.

Locally, our Collection Development Department evaluates our local subscriptions and programs such as our Demand Driven Acquisitions program. California Digital Library provides data for our system-wide consortial subscriptions and purchases.

More of a yes, no, and sometimes. It is dependent on the data and the level of analysis needed.

Sometimes different group/individuals are involved, sometimes it is the same groups/individuals. It really depends on the situation.

Statistics for resources purchased through our state consortium are collected by the consortium. Consortium staff analyze these as needed for purchasing decisions and planning purposes, but we also retrieve and analyze our individual institutional statistics as needed for our own purposes.

The locus of collection assessment data collection and analysis is the Collection Management department. However, that department works closely with other departments and consortial partners depending on the nature of the assessment needed.

The staff involved in data collection and analysis varies from project to project but for the most part are drawn from a list of "usual suspects."

There are both consortial and institutional efforts underway to assess the collections. Those efforts dovetail but are not necessarily coordinated.

This question is difficult. For parts of our collection, one group or individual collects the data and another group or many individuals analyze the data. For other parts of the collection, data and analysis are collected by one group or individual. For consortially purchased packages, data is collected and analyzed by the consortium.

Use of archives and manuscripts is usually collected by our Archives and Special Collections. Use of our digital repository is usually collected by the Scholarly Communications Office. At this time, such data collection for all collections is performed primarily at the divisional level, or "branch" level and is reported separately and maintained separately. Some data collection is a joint effort between two divisions (e.g., vendor usage data).

With the addition of a Collection Assessment Librarian, collection and analysis is becoming more centralized. Historically, each librarian was responsible for analysis which led to minimal cross-referencing and a less comprehensive view of the collection. The Director of Collection Development maintained a steady hand with regard to the acquisitions of collections. Data analysis is also conduced by the Collection Strategist and the Associate Dean of Collections.

SAME INDIVIDUAL OR GROUP

10. Please indicate which of the following best describes the organizational structure for the personnel who currently have responsibility for collecting and analyzing library collection data as all or part of their job duties. N=26

A committee/group from two or more departments within the library	11	42%
A single position within the library	4	15%
A single department within the library	3	12%
A committee/group from the library and other departments in the institution	0	0%
A committee/group from the library system	0	0%
A committee/group from the library consortium	0	0%
A committee/group from the shared collection partners	0	0%
Other organizational structure	8	31%

COLLECTION ASSESSMENT STAFF: SINGLE POSITION

11. **Please list the position title of the person who is responsible for collection assessment and estimate the percentage of their time spent on these activities in a typical year.** N=4

Position title	Percentage of time
Collection and Organizational Data Analysis Librarian	90%
Collection Assessment and Analysis Librarian	100%
Collection Management Librarian	20%
Collections Strategist	50%

Comment N=1

This position [Collections Strategist] was recently vacated so we're assessing our current library needs to identify changes that need to occur to ensure data can be analyzed to support new directives. This position was also part of existing collection teams.

COLLECTION ASSESSMENT STAFF: SINGLE DEPARTMENT

12. **Please enter the name of the department that is responsible for collection assessment, the number of staff in the department who do collection assessment, and an estimate of the percentage of their time spent on these activities in a typical year.** N=3

Department name	Number of staff	Percentage of time
Collection Development	8	25%
Collection Management	2	3–5%
Collection Strategies Unit	4	~20%

Comments N=2

Depending on the project, Collection Management may ask for some help from another person in a different department.

Collection Strategies is a new unit just formed in April, without all staff in place, yet. It will take us some time to form and be fully functioning. A goal is to integrate assessment alongside all other collections work that the team of four librarians will perform. It is a centralized group, responsible for collection management, development, and assessment.

COLLECTION ASSESSMENT STAFF: COMMITTEE/GROUP

13. **Please enter the name of the committee/group that is responsible for collection assessment and the number of members.** N=11

Committee/group name	Number of members
Ad hoc group	7
Assessment team	6
Collection development steering committee	6–7
Collection Management	12
Collection Management Committee	10

Committee/group name	Number of members
Collection Services Staff and Assessment Librarian	3
Collections Assessment Task Force	7
Content Strategies for Teaching & Research	8
Standing Committee on Collections	7

Comments N=2

Not yet formalized

Two departments collect and analyze the data in coordination but separately with no joint meetings.

14. How often does the committee/group meet each year? N=9

12–20 times

4x/year

Almost weekly

Collection Services Associate Dean and the Director of Collection Development collect and review the data working with our Assessment Librarian who works in our dean's office to review and complete surveys related to the data. The Collection Development Committee reviews the data for targeted projects, for example this year to determine a renewal of a large e-resources package.

Depends on the project. Many projects are conducted via email and don't require meetings.

Monthly (4 responses)

15. About how many hours do the committee/group members spend on collection assessment each year? N=9

100

1326

40 hours

At least 10 per week

For the regular work maybe a total of 100 hours per year, plus any committee or special projects would be another 100 hours.

Not many, doing non-collection assessment at this time

Unknown, committee has just been formed.

Varies (2 responses)

16. Please indicate which staff positions are members of the committee/group. Check all that apply. N=11

Coordinator/manager/department head for collection development	7	64%
Administrator with collection assessment duties	7	64%
Collection development librarian	6	55%
Subject/reference librarian	5	45%
Support staff	5	45%

Coordinator/manager/department head for acquisitions	4	36%
Acquisitions librarian	3	27%
Collection assessment librarian	2	18%
Serials librarian	2	18%
Cataloging/technical services librarian	1	9%
Special collections librarian	1	9%
Other staff category	4	36%

Please specify the other category. N=4

Assessment Librarian (2 responses)

Assessment librarian, reference, ILL, special collections, music, systems

Head of Liaison, Head of Access Services, Head of Conservation, Collection Analyst, Digital Collections Specialist

COLLECTION ASSESSMENT STAFF: OTHER ORGANIZATIONAL STRUCTURE

17. **Please briefly describe the other organizational structure for collection assessment.** N=8

A single individual is responsible for collecting most of the data and facilitating analysis (takes about 25% of his time on average) and a group/committee is responsible for the final aspects of analysis. For collections specific to a particular library, the librarian at that location is primarily responsible for analysis. For cross-disciplinary resources a central committee assists with the analysis and makes recommendations for cancellation. The committee has seven members and meets every two weeks. The committee consists of collections/subject librarians, a department head, technical services librarian, and support staff.

Aside from the Collections Assessment Librarian (0.5 FTE), staff at various departments and libraries collect and analyze a variety of collections data as part of their job duties and as needed.

Assessment activities are primarily located in the Technical Services Division.

Assessment is done by one person with half-time assessment responsibilities, as well as by subject librarians, most of whom are in the Collections Division but some of whom have primary job responsibilities in other divisions.

In the main library, liaisons work with the Head of Technical Services on collection assessments. In the professional school libraries, it is typically a single position who conducts these assessments.

Most routine collection assessment has been done by the Head of Collection Development. But other projects, such as MINES, was done by the Libraries' Assessment Committee, which includes representatives from each of the administratively separate libraries on campus (main, law, medical, theology).

The Collections Coordinator coordinates the collection of use data for the regular collections and prepares some overview reports, but each liaison/selector collects and analyzes some data relevant to their subject area also. Special collections does their own collections assessment.

There is an overarching assessment group (known as the Assessment Integration Group) that consists of representatives (sometimes multiple) from individual divisions within the library. The Services Division (of which collections is a part) is represented by an assessment coordinator within the division (not a full-time position, about 25% of said staff's time). Said coordinator/representative is in charge of coordinating data collection for major data efforts within his/her division. Until very recently (due to a retirement), the library had an assessment coordinator; currently, there is a part-time temporary staff person in charge of coordination, who depends on AIG representatives for gathering needed data. At this time, such data collection for all collections is performed primarily at the divisional level, or “branch” level and is reported separately and maintained separately. In particular, I am referring to local digital collections, repository use, and archives and manuscript usage. Some data collection is a joint effort between two divisions (e.g., vendor usage data).

DIFFERENT INDIVIDUAL OR GROUP: DATA COLLECTION

18. Please indicate which of the following best describes the organizational structure for the personnel who currently have responsibility for collecting library collection data as all or part of their job duties. N=41

A committee/group from two or more departments within the library	16	39%
A single department within the library	6	15%
A single position within the library	2	5%
A committee/group from the library system	2	5%
A committee/group from the library and other departments in the institution	0	0%
A committee/group from the library consortium	0	0%
A committee/group from the shared collection partners	0	0%
Other organizational structure	15	37%

DATA COLLECTION STAFF: SINGLE POSITION

19. Please list the position title of the person who is responsible for data collection and estimate the percentage of their time spent on these activities in a typical year. N=2

Position title	Percentage of time
eResources Access Coordinator	30%
Library Assistant 4, Collection Development	20%

Comment N=1

Collections Analyst also collects statistics on demand for specific projects.

DATA COLLECTION STAFF: SINGLE DEPARTMENT

20. Please enter the name of the department that is responsible for data collection, the number of staff in the department who do data collection, and an estimate of the percentage of their time spent on these activities in a typical year. N=6.

Department name	Number of staff	Percentage of time
Acquisitions	5	5%
Collection Strategies and Services		40%
Collections and Content Strategy	3	10%
Collections Assessment Librarian	4	100%

Department name	Number of staff	Percentage of time
Direction des acquisitions, du traitement et de la conservation des collections	4	8%
Distributed Technical Services	2	60%

Comments N=2

There is not one person whose job responsibilities focus on collection assessment. However, at least four unit personnel are active in this area at various times, as well as subject specialists. Percentage represents an aggregate of time for these individuals.

One of the three staff members is always a student employee.

DATA COLLECTION STAFF: COMMITTEE/GROUP

21. Please enter the name of the committee/group that is responsible for data collection and the number of members. N=17

Committee/group name	Number of members
CDRS Steering Committee	7
Collection development and e-resources	5–8
Collection Strategies Committee	8
Collections Services Advisory Group	12–15
Collections Steering Committee	10
Collections Team	18
Cross-Area Assessment Team, Collections Management unit	11
Data collection is conducted throughout the organization; a core of the membership serves on the Assessment Committee of the library.	
Different people in different positions in the library depending on the task. We will be forming an Assessment Committee next year.	6
Group has not been formalized. Includes library staff in Acquisitions/ E-Resources, Access Services, Library IT, Communications & Assessment	5–7
Informal group, no name	6
No formal name - different departments	12
Not a formal committee for data collection but rather staff from several library departments as part of their job responsibilities	2 staff that regularly collect data, others as needed or requested
Not an official group at this point in time, though we are moving in that direction.	3
Not truly a committee, but rather staff members and librarians from a variety of units including Acquisitions, Resource Management, Discovery, Resource Sharing, Collection Development, and Administration.	6–10
Our collection assessment is not done by a formal committee, rather is done through the workflow of multiple positions in different departments.	n/a
Program Management Center	4

Comment N=1

The Collections Management team is responsible for collecting and assessing data specific to developing & managing the collections. There is a small time commitment for assessment and we are working on developing a more comprehensive approach.

22. How often does the committee/group meet each year? N=17

24

12 times

About 12 times

About 20 times

Ad hoc

Bi-weekly

Cross-Area Assessment Team meets monthly. Collections Management unit meets as needed.

Group is not yet formalized.

Monthly/as needed

No formal meeting times

Ongoing. Respond to individual requests, complete reporting to internal and external organization and others.

Our collection assessment is not done by a formal committee, rather is done through the workflow of multiple positions in different departments.

Project-dependent. There is currently a Data Dashboard group that meets weekly.

Various subgroups meet on different bases, CMC (which includes members of Collection Development, Resource Management, Acquisitions, and Discovery) meets monthly. Other groups may meet more or less infrequently and formally.

We do have a Collections Committee (7 staff members) that meet on a monthly basis. This group is responsible for reviewing policies/procedures for the library system. If a large-scale assessment project for the library system were to be undertaken, this committee would be the first staff involved and likely oversee the project. Membership on the committee rotates each year. Members serve two-year terms.

We don't necessarily meet since we have a process in place. Each person contributes to the overall project.

We meet weekly.

23. About how many hours do the committee/group members spend on data collection each year? N=14

2

600

100 hours

16 to 20 hours per quarter

2 FTE

About 1,000

Depends on the amount of collection assessment project work to be done.

Hard to estimate, since activity might be extracting cataloging information (annual statistics) to daily extraction of circulation statistics for analysis of use.

Hard to evaluate

Hours spent for regular reporting: about 35 hours per year. Hours spent for project-based data collection and analysis: over 1000 hours per year.

Not tracked

TBD

The committee relies on data gathered elsewhere in the library.

We are beginning a new process. At this point we are unable to give definite numbers.

24. Please indicate which staff positions are members of the committee/group. Check all that apply. N=18

Coordinator/manager/department head for collection development	10	56%
Support staff	10	56%
Acquisitions librarian	9	50%
Coordinator/manager/department head for acquisitions	9	50%
Collection assessment librarian	8	44%
Collection development librarian	8	44%
Administrator with collection assessment duties	7	39%
Cataloging/technical services librarian	6	33%
Special collections librarian	6	33%
Subject/reference librarian	6	33%
Serials librarian	4	22%
Other staff category	10	56%

Please specify the other staff category. N=10

Administrative officer, digital projects librarian, preservation department head

Assessment & Organizational Performance; Technical Services (IT)

Assessment officer

AUL for special collections, representatives from the system's law and health libraries

Collection assessment staff

Data analysts

Digital Services Librarian

E-resources librarian; ILL staff

Library Systems Manager, Scholarly Repository Services, Digital Operations Coordinator

Systems Analyst from Library IT; Research and Assessment Analyst/Librarian from Library Communications & Assessment unit

DATA COLLECTION STAFF: OTHER ORGANIZATIONAL STRUCTURE

25. Please briefly describe the other organizational structure for data collection. N=15

Ad hoc basis driven by needs of the Libraries (e.g., strategic use of space) involves subject specialists, collections, and technical services and institutional overviews.

Assessment, Collections, Access Services, Acquisitions, subject librarians, Budget and Cost Management for main campus plus health sciences plus law plus branch campuses

Collections-related data is collected in coordination with several departments including Collection Management, Planning and Research, Acquisitions and Discovery, Information Technology, Research and Information Services, Digital Library Initiatives, and Special Collections. Data is collected in both an ongoing/formal manner as well as in an ad hoc manner.

Data collection is spread among several individuals, a committee/group, and department heads.

Data is collected by the Head of Collection Development working with a library Data Analytics Specialist, the ILS Coordinator, Head of Acquisitions, and Stacks Supervisor. Additional data may be collected by other teams that include librarians with collections responsibilities and other staff on a project basis.

Data is collected by the liaison librarians for disciplines where program reviews take place and do not necessarily report to one department, although they are all public services librarians. There is usually support staff who work with the liaison librarians on collecting the data.

Distributed among Assessment Librarian, Collection Development, Access Services, Technical Services (Acquisitions and E-Resources) and Library Business Office.

ILS, Collections, and Library IT all play a role in data collection. ILS collects data through our ILS (SirsiDynix). Library IT collects data through EZproxy and other routes. Collections collects, curates, analyzes, and disseminates data in a variety of ways. Collections uses Intota Assessment for COUNTER and SUSHI reports. To a lesser extent (in terms of volume), other data collection systems include: Aeon in Special Collections; CONTENTdm in Digital Library; LibAnalytics in Reference, Instruction, and Public Services. The Programs and Planning department collects data unrelated to collections.

Multiple individuals in multiple departments gather data. This includes staff from acquisitions, cataloging, technology services, and members of certain committees.

Multiple staff from multiple departments, not necessarily as a group

Staff in various departments collect data on the resources that they manage, and our assessment librarian also collects some collection data.

The Libraries' Assessment office gathers data from individuals and systems in different library departments including Cataloging, Systems, Research Collections, and Interlibrary Services in response to requests from external agencies and internal users. Individual departments may collect and analyze data for their own administrative purposes.

Various individuals in various libraries and departments collect data about collections. This include Collection Development, Assessment, Access Services, E-resources, IT, and Collection Management.

We have 1 FTE staff position dedicated to data collection and one librarian position in systems that creates query forms and reports for data collecting as needed (this is only a small part of this position's responsibilities). Most of the requests for data collection come from the collection development or reference departments. Librarians in these departments also sometimes gather data for themselves in addition to requesting it from dedicated staff.

We have an Assessment Librarian, who is often the lead the data collection and analysis. We also have a Collections Management & Planning unit (1 librarian + 1 support staff member) who do a lot of collections assessment work and who work closely with the Assessment Librarian. Our eResources & Acquisitions team (1 librarian + 6 support staff) collect data for our electronic resources. Assessment of our digital (locally created) resources is done on an ad hoc basis by librarians in our Digital Programs & Services unit (4 librarians).

DIFFERENT INDIVIDUAL OR GROUP: DATA ANALYSIS

26. Please indicate which of the following best describes the organizational structure for the personnel who currently have responsibility for analyzing library collection data as all or part of their job duties. N=40

A committee/group from two or more departments within the library	12	30%
A single position within the library	5	13%
A single department within the library	5	13%
A committee/group from the library and other departments in the institution	1	3%
A committee/group from the library system	1	3%
A committee/group from the library consortium	0	0%
A committee/group from the shared collection partners	0	0%
Other organizational structure	16	40%

DATA ANALYSIS STAFF: SINGLE POSITION

27. Please list the position title of the person who is responsible for data analysis and estimate the percentage of their time spent on these activities in a typical year. N=4

Position title	Percentage of time
Acquisition's Library Associate	100%
Assistant Director for Collection Development and Analysis	15%
Head of Collection Development and Assessment	30%
Library Collections Analyst	90%

Comment N=1

The Library Collections Analyst position also collects statistics on demand for specific projects.

DATA ANALYSIS STAFF: SINGLE DEPARTMENT

28. Please enter the name of the department that is responsible for data analysis, the number of staff in the department who do data analysis, and an estimate of the percentage of their time spent on these activities in a typical year. N=5

Department name	Number of staff	Percentage of time
Acquisitions and Collection Development	2	90% for one, 50% of another
Assessment & Communications	3	
Collections	1	40%

Department name	Number of staff	Percentage of time
Collections and Content Strategy	3	10%
Collections and Technical Services	6	60%

Comments N=3

We are still evaluating options for distributing collection metrics and assessment tasks, but the more complex data analysis projects will likely fall to the library's Assessment & Communications unit, whose staff includes two Research and Assessment Analysts and one Research and Assessment Librarian. This unit already supports some aspects of collection assessment. It is unclear what the additional time commitment will need to be to meet emerging needs (which have become particularly palpable with the recent retirement of the library's dedicated Collections Analyst).

This position [Collections] spends a full 80% on collection assessment of which about half is related to various levels of analysis.

One staff member is always a student employee.

DATA ANALYSIS STAFF: COMMITTEE/GROUP

29. Please enter the name of the committee/group that is responsible for data analysis and the number of members. N=14

Committee/group name	Number of members
Collection Analysis Group	11
Collection Development, Circulation, and Information Services and Resources	Upwards of 30, depending on the scope of the project.
Collections Advisory Committee; Subject clusters; Access services; Assessment; Collections Space Task Force	40
Collections Services Advisory Group	12–15
Collections Team	18
Comité de gestion des collections	10
Cross-Area Assessment team, Collection Management unit	11
Librarian Subject Groups	
National Collections Program Office (NCP)	4
No formal name	15
No formal name	4
Not an organized committee; analysis happens as staff indicate need to review data for projects	
Please refer to previous answer. Committees share responsibilities for collection and analysis.	
The ARL Workgroup and Selection Workgroup	6

30. How often does the committee/group meet each year? N=12

24

About 10 times per year

Ad hoc

As needed

Cross-Area Assessment team meets monthly. Collection Management unit meets as needed.

Currently we meet weekly.

Monthly (3 responses)

No formal schedule or time

Varies, most monthly

Weekly

31. About how many hours do the committee/group members spend on data analysis each year? N=12

20

2–3

16–20 hours per quarter

200 hours

30 hours: formal meetings. 60 hours: informal meetings, 60 hours: follow-up and office work

Approximately 140 hours

Associate Dean for Collections reviews budget information weekly. Subject liaisons review data as needed for projects.

It depends on the nature and scope of the project[s].

Not tracked

Over 100 hours if combining all the members' time

Unknown

We are beginning a new process. At this point we are unable to give definite numbers.

32. Please indicate which staff positions are members of the committee/group. Check all that apply. N=13

Subject/reference librarian	11	85%
Coordinator/manager/department head for collection development	10	77%
Collection development librarian	6	46%
Administrator with collection assessment duties	6	46%
Support staff	6	46%
Acquisitions librarian	5	39%
Collection assessment librarian	5	39%
Cataloging/technical services librarian	4	31%
Coordinator/manager/department head for acquisitions	4	31%
Special collections librarian	4	31%
Serials librarian	2	15%
Other staff category	6	46%

Please specify the other staff category. N=6

Access services, Facilities, IT, IR, Scholarly communication

Assessment officer

Digital services librarian

NCP office staff run the numbers, create reports. SIL staff then review.

Program Management Center

Specialiste en gestion des contenus numeriques

DATA ANALYSIS STAFF: OTHER ORGANIZATIONAL STRUCTURE

33. Please briefly describe the other organizational structure for data analysis. N=16

Ad hoc basis driven by needs of the Libraries (e.g. strategic use of space) involves subject specialists, collections, and technical services and institutional overviews.

Analysis happens at multiple layers within the organization. Individual role: Collections Analyst and Strategist Group within one department; Collections Strategists Leadership: department head for Collections Strategy and Associate Director for Collections

Analysis is carried on by individual librarians in collection development, reference, and sometimes acquisitions/serials. Collection analysis is not a formal requirement for any of these positions, but they are sometimes called upon to assist with reports or answer questions for which collection data is needed.

As with data collection, data analysis staff are distributed across multiple library departments. Data analysis projects are collaborative efforts in coordination with several departments including Collection Management, Planning and Research, Acquisitions and Discovery, Information Technology, Research and Information Services, Digital Library Initiatives, and Special Collections.

Data analysis is performed by a large number of librarians throughout our library: subject specialists, Assessment Librarian, Collections Management & Planning Librarian, eResources & Acquisitions librarian. Selected support staff (maybe 3) also do data analysis because they perform high-level work.

Data analysis is performed by the Collections Analyst and Strategist and/or by ad hoc groups depending on the project at the request of the Collection Strategies Committee.

Data is analyzed by librarians and staff who collect the data as well as by subject librarians and library administrators. The Collection Evaluation & Assessment Coordinator analyzes data in collaboration with subject liaisons to provide support for print and electronic collections assessment initiatives such as transfer/weeding projects. Usage and cost data is analyzed by faculty and subject liaisons for collection development purposes. Our Collections Strategy Group focuses on assessment with a broader-based collaborative approach. The Library Assessment office provides analytical support to the coordinator and to library administration for collection assessment as well as for assessment of other library activities.

Distributed among Assessment Librarian, Collection Development, Access Services, Technical Services (Acquisitions and E-Resources), and Library Business Office.

Head of Collection Development, Head of Acquisitions, librarians with collections responsibilities, and other staff as participants in project-based groups or teams.

Liaison librarians analyze the data they collect and prepare a report. This report is reviewed by the Collections Management Coordinator who will also analyse the data and sometimes collect more or will sometimes ask for more data from the liaison librarian. There is also support staff available in Collections Management for this task.

Multiple people conduct analyses from throughout the organization.

Staff from different departments analyze data for collections that they manage, our selectors review and analyze data in their collection areas, and our assessment librarian analyzes some collection data. We also have a recently formed Collection Analysis Task Force that is working on collection analysis.

The Associate Dean for Collection Strategies has overall responsibility for data analysis, but many other individuals contribute to analyses needed for specific projects. These may include senior members of the Acquisitions Department as well as liaison librarians. The Acquisition Department reports to the AD for Collections and the liaison librarians are dotted line reports.

The library's Licensing & Acquisitions unit does most types of analysis for most types of resources. The systems librarian does analysis of circulation data. Personnel in the library's ILL unit does analysis for ILL transactions.

The organizational structure for data analysis is handled by several individuals, a committee, department heads, and administrators.

Various individuals in various libraries and departments analyze data about collections. These include Collection Development, Assessment, Access Services, E-resources, Collection Management, and Subject Librarians.

PURPOSE OF COLLECTION ASSESSMENT

34. For what purpose(s) are the collection assessments or evaluations initiated at your library? Check all that apply. N=65

Collection development	62	95%
Library administration/other library-specific	57	88%
Accreditation review (program, department, or school level)	46	71%
New program reviews	39	60%
Accreditation review (college/university level)	37	57%
Internal academic reviews of programs	31	48%
Initiate development of a shared collection	30	46%
Establish criteria for collection selection digitization	24	37%
Evaluate shared collection strategy effectiveness	24	37%
Other purpose	23	35%

Please briefly describe the other purpose. N=23

Ad hoc basis driven by needs of the Libraries (e.g., strategic use of space) involves subject specialists, collections, and technical services and institutional overviews.

Annual reporting to institution leadership and Congress

Budget savings

Efficiency (de-duplication process), faculty support and promotion, budgeting, organizational promotion, strategic plan initiatives

Fiscal constraints, space constraints

Good stewardship

I've selected the purposes that our assessment activities primarily serve today (the accreditation function is specific to the Law School). Most of the other listed purposes are potentially relevant too, however, particularly evaluation of the effectiveness of shared collecting—collection assessment projects have informed our coordinated collection programs with partner institutions, but for the most part, these initiatives are relatively new and haven't been thoroughly evaluated yet.

Identify materials for offside storage or for deselection.

Initiate/evaluate media and technology resources that are cataloged and circulated for patrons.

Management of legacy print collections; budget proposals

Maximize our utility to our patrons under the constraints of inflation and a flat budget.

Move of collection to new building and ASRS; deselection

Moving collections off campus

Renewal decisions

Renewal of materials, budgeting

Space, conservation/preservation needs, cataloging prioritization of backlogs

Space; ILL, inventory, student fee review board; provost reports

Title VI Center program reviews

To answer questions from departments about library funding and acquisitions

To complete surveys for consortia and organizations

Understanding user behavior of certain formats (e.g., e-books)

We also perform collection assessments to aid in periodic, budget-driven serials reviews. In addition, we continually assess our collections in an effort to maximize their value and relevance to faculty and students of the university.

When cost reductions are required.

35. How are the collection evaluation results used in your library? Check all that apply. N=65

Select physical materials for weeding or remote storage	63	97%
Evaluate serials or database for selection or de-selection	62	95%
Identify database overlap	52	80%
Adjust allocations of expenditures or funds	48	74%
Demonstrate value to the institution	46	71%
Demonstrate level of activity	46	71%
Justify funding increases to stakeholders	46	71%
Evaluate collection strengths and weaknesses	45	69%
Demonstrate the adequacy or inadequacy of collections for accreditation	43	66%
Estimate costs of new or upgraded collections	39	60%
Demonstrate comparisons with peer institutions	35	54%
Identify core works or journals	34	52%
Identify core collections of the library or consortial libraries	29	45%
Demonstrate value to the patron	28	43%
Target parts of the collection for promotion and/or instruction	26	40%

Modify or adjust shared collection strategy	24	37%
Decision to initiate a shared collection strategy	24	37%
Evaluate selector effectiveness	12	19%
Identify opportunities for digitization	2	35%
Collection evaluation data is not used for collections work	2	3%
Other use	9	14%

Please briefly describe the other use. N=9

Demonstrate use/value to academic departments.

Demonstrate value to the patron and to the institution: we are planning to.

Determine expenditure trends by format.

Fund raising

Identify fragile materials for preservation.

Preservation

Promote faculty output

Strategic use of space

To identify patron interests at a departmental level. To ensure an adequate number of copies are made available.

DATA COLLECTION TOOLS, METHODS, AND FREQUENCY

36. Please indicate what software or online services your library has used for storing and analyzing data for collection evaluation purposes and any that you would be interested in using in the future. Check all that apply. N=66

Software or Service	Has Used	Interested in Using	N
Excel or other spreadsheet program	66	2	66
Data visualization (e.g., Tableau)	28	30	54
Access database	41	6	46
SQL Server or other relational database server	29	7	34
Springshare's LibAnalytics	19	14	32
EBSCO's Usage Consolidation	23	7	30
ProQuest's 360 Counter	24	4	28
Statistical software (e.g., SPSS)	16	11	27
Institutional Repository	21	6	27
Institution's data storage service	18	7	24
System developed locally/in-house	20	7	24
Counting Opinion's LibPAS	7	5	12
Other software or service	21	8	27
Total Respondents	66	43	66

If you selected "Other software or service/Has Used" above, please briefly describe the software or service. N=21

Alma Analytics (2 responses)

Alma Analytics—but usually the data extracted is converted into a spreadsheet for further analysis. OCLC Collection Analysis Tool (pre-SCS). JSTOR's What to Withdraw Tool

Brioquery and Cognos to query the data warehouse. R, SQLite Manager, Open Refine

CONTENTdm

Ex Libris UStat usage statistics service

Gold Rush, AWStats

Gold Rush collection comparison tool

Google Analytics and customization, other web analytics tools. We are in the process of implementing Altmetrics.

ILS (SirsiDynix)

Innovative's Decision Center

Intota, incites, consortia systems and tools

Ithaka Faculty Survey

MPS's Scholarly Statistics, SCS' GreenGlass collection analysis

OCLC Analytics

OCLC Worldshare Analytics

Pajek, UCINET, and HistCite

PeopleSoft to link with university finance system, Intota Assessment

Piwik

Sustainable Collection Services outputs

We have used OCLC/Sustainable Collections Services' GreenGlass and also GreenGlass for Groups as part of our participation in EAST.

If you selected "Other software or service/Interested in Using" above, please briefly describe the software or service. N=8

EZproxy log file analysis for e-resource usage. We are interested in looking at MISO as an open source SUSHI.

GreenGlass collection assessment service provided by OCLC

Intota

SCS, Gold Rush

We are exploring the use of Ex Libris UStat for collecting & reporting e-resources usage statistics.

We would like to better leverage our EZproxy logs, but this would require development time (in-house). SUSHI

Would like to learn more about visualization tools beyond Tableau.

If your library has used a "System developed locally/in-house," please briefly describe the system. N=17

A relational database with SQL

A SharePoint-based site called New Serial Title System. A local system, the Serials Extract File, PubMed, PMC

Customization of Google Analytics of events to track use of resources.

Data files stored on library Intranet and/or collaborative cloud storage system. Faculty interest survey for journals developed based upon instance here and conducted in 2014.

Database for analysis of journal big deal titles

DataMart: a self-service report application that uses batch-collected data from various systems, primarily our ILS (Aleph).

It is a locally developed ERM.

Library Online Course Reserves (LOCR)

Metridoc: https://metridoc.library.upenn.edu

Our library has developed an integrated serials review system in collaboration with several departments. The system uses a combination of a MySQL database and web services to display serials information to the university community and to record title-level feedback regarding possible cancellations.

Reporting system querying data from institutional data warehouse.

SORA, RMOA

The Cornell University Library Web Logs Statistics Tool (CUL Logs) is based in part on the conceptual framework of "bibliomining" (http://www.bibliomining.com/). One of the key features is a method to protect patron privacy by replacing information in data logs that can identify an individual (such as an IP address) with location or patron type surrogates.

There are multiple systems we have developed in-house to help us evaluate acquisitions and collections. Some are simple systems that report expenditures in all categories for individual selectors and some are complicated systems that show journal usage and overlap for all journal titles in our collection.

Tool for locally storing and delivering usage statistics on the web

Using Excel spreadsheets for indexing and displaying data and our local file servers for storage.

We have been using Python for data cleanup and d3.js for data visualization. We also make heavy use of Google Sheets.

37. How frequently is the data collected? Check all that apply. N=66

Annually	43	65%
Quarterly	20	30%
Monthly	22	33%
Other interval	45	68%

Please briefly describe the other interval. N=45

1x project based (GreenGlass)

Ad hoc

Ad hoc/as needed

All of the above, as well as ad hoc

Also upon request

Annually and as needed to answer questions

Annually for external reporting, for internal assessment--as needed

As needed (5 responses)

As needed for an individual program review

As needed for projects

As needed for projects and subscription decisions

As needed for sporadic reporting

As needed or required

Aside from our normal data collection for ARL, we do have assessments throughout the year for weeding.

Biannually

Budget data collected weekly

Continuously

Currently as needed, hoping to develop regular schedule

Currently, as needed. Planning to be more systematic about data collection in the future.

Daily

Data collected as needed, e.g., to meet university deadlines

Data is mostly transactional (so is collected continuously) and is analyzed as required.

Depends highly on the nature of the data request/need; most data annually, some an ad hoc basis.

Different data is collected at different intervals.

E-resources usage statistics: semi-annually

Frequency varies for different data types. Some (COUNTER usage data) is gathered regularly while other data is gathered when needed for a project.

From daily to on demand, depending on assessment purpose

Interval depends on the data. Acquisitions and expenditure data is captured in an ongoing way and is available to collection development librarians on demand, via a suite of MS Access report macros that pull data from our instance of Voyager. We now get most of our COUNTER stats on e-resource usage via ProQuest's Intota; these are delivered twice a year.

Irregularly, as needed

Live for some data and on a routine basis for other.

On demand (2 responses)

Presently collected on a rolling basis as we try to establish a regular data gathering and analysis workflow.

Project specific (2 responses)

Semiannually, January & July

Varies from annually to as requested, often in connection with collection management projects.

Varies: monthly or as needed

Varies. E-resource data is gathered twice a year. Other data is gathered annually or as needed.

We also collect anonymized transactional data on a daily basis.

Weekly, daily

38. How accessible is the data that is collected to those who are directly responsible for collection evaluation? N=66

Most, if not all data is easily accessible directly to those responsible	23	35%
Some data is accessible directly, other data upon request	23	35%
Most, if not all data is made accessible upon request	11	17%
Some data is accessible upon request, other data not accessible at all	4	6%
Most data is not accessible at all	0	0%
Other level	5	8%

Please briefly describe the other level of accessibility. N=5

Data for physical collections at level wanted is not currently available; electronic use data is available on request but we hope to push it out regularly.

Most data is directly available, but not necessarily organized in a way that makes it easy for those who might want to use it to find or manipulate it, so it's accessible, but not easily accessible.

Most of the data is accessible directly to those responsible, but it is not necessary "easily" accessible. E-collection data is easily accessible through Intota Assessment. Print collection data is available through the use of Brioquery or Cognos to query the data warehouse. We make various "canned" reports available to make access to the data easier.

Some data is accessible directly, other data upon request. A system for the data of interlibrary loan services was instituted for ease of accessibility.

We collect our data and share it on common drives and our Intranet, so that our staff can view the data we collect.

39. Are there tools for data collection that you would like to have at your institution that do not currently exist? N=60

Yes	42	70%
No	18	30%

If yes, please briefly describe what this tool would do. N=41

A cloud-based service to aggregate—and validate—data on serials expenditure and usage, allowing us to arrive at a cost per use per full-text title and per database in a reliable and transparent way. Serials Solutions Intota system seems inadequate to this task. Additionally, integration of collections data into the university's data warehouse could allow us to identify types of users (based on school/department affiliation, status, etc.), which we currently lack the ability to do.

A decent and affordable deselection tool for batch comparison of holdings (i.e., like GreenGlass or WC Analysis, but with better price point. Also, a tool that integrates alt-metrics, ILL, turnaways, etc. data would be ideal. Something that assesses need based on available aggregating data.

A fully integrated ILS

A functional Standardized Usage Statistics Harvesting Initiative (SUSHI) implementation

An integrated tool that would automatically collect data and send it to our analysis system.

A simple method for running circulation reports for monographs by type of acquisition. SUSHI currently does not work for many platforms and reports are not truly COUNTER-compliant. An automated tool that would easily retrieve usage statistics in standard formats and would integrate with cost information would be very helpful.

A tool that integrates use data from print and electronic collections. A tool that easily pulls data from acquisition records, circulation records and COUNTER reports to accurately calculate cost per use.

A tool that scrapes bibliographic information from grant proposals, faculty annual reports, materials in the institutional repository, course management sites, etc. but that allows for anonymity.

Allow data aggregation and analysis from disparate data collection systems.

Anything that helps collect data automatically, with reliability.

Automated tools for retrieving and presenting e-resource usage information at appropriate time-points are needed.

Collection analysis and visualization tools that combines journal and monographic information.

Compare library holdings to other lists (e.g., new e-book/journal package, list of faculty publications) to identify overlap and gaps in the collection.

Dashboards of collection analytics for individual selectors, as well as an SQL-builder for targeted SQL queries of the ILS.

Easier to use and more robust reporting functionality, mostly within ILMS, for analysis like cost per use and breakout of use by LC Class.

Easily combine electronic and print usage and combine all usage across multiple platforms.

ERM for tracking COUNTER usage statistics over time (does not exist at my institution).

ERM system integrated to our library system (does not currently exist at our library).

I didn't want to reply no and suggest that I'm not interested in new tools, but I don't know what already exists. It seems to me that the way we collect and organize collection data is somewhat cumbersome and time-consuming, but it hasn't been a high enough priority overall for anyone to devote the time or effort it would require to improve it significantly, so mostly we just muddle along with what we have.

I wish it were easier to review the data for e-resource usage. Right now various platforms have their own outputs and it takes manual intervention to put it together.

I would like see a tool that integrates cost, usage, and holdings data for all collection formats and makes it available to various library stakeholders in an easy-to-use way. It would make it easy to move up and down between levels of information granularity and would provide historical as well as current data analysis.

I'd like our ILS to be able to do better reports and combine things in the way I would like them, but alas it is not happening anytime soon. Have to do a lot of manipulation to get what I want sometimes.

In-house SUSHI retrieval service. Overlap tool that is connected to a usage retrieval and analysis tool. For example, Serials Solutions has an overlap tool and it would be great to have it connected to the 360 Counter product.

Internal database to allow all collected data to be in one place and have the ability to run reports and combo reports to have a better "big picture" of what data is collected, allow efficiency, and help expedite the annual reporting.

Intota assessment. Holistic aggregation and analysis of print and electronic collections, including content and usage.

It would blend financial and usage data in an accurate, useful, actionable way and would be open source and scalable to consortial/shared activities.

It would concatenate all of our various data into a single system that generates meaningful reports that show the sometimes complicated relationships between all of the collected data.

More consortial stats from Alma/Primo

More information about e-resource usage by patron group

Not a tool, but a position: an assessment position that would be responsible for assessment in a variety of areas, including collections.

OCLC Collection Evaluation Analysis System for collection management and analysis

On-demand data for selectors

Plum Analytics (primarily for repository use data), altmetrics tools

Replacement of current library management system with one that makes data collection easier. Currently, it is necessary to pull data from a variety of sources.

SCS, Gold Rush

SCS GreenGlass

Tableau

We are interested in systems that link to vendor-supplied or maintained data, and other data readily available in standard format. We are interested in a robust and customization system for reporting.

We are looking for a tool to more easily run reports on our catalog to analyze our print collections. It may exist, we have not looked very hard as of yet.

Would be great if our automated monitoring systems (gate counters, environmental monitors) would auto-report to a server. ILLIAD data does not have good auto-capture now.

Yes, if a full usage consolidation tool that incorporated all COUNTER reports were available, we would be quite interested. Encouraging EBSCO to include more reports.

DATA ANALYSIS TOOLS, METHODS, AND FREQUENCY

40. For each collection assessment or evaluation method listed below, please either select how frequently your library has used it over the last ten years, or indicate that your library plans to use it, or has never used it. Please make one selection per row. N=66

Quantitative, collections-based N=66

Method	Once	Annually	Another interval	Plan to use	Never used	N
Collections budget analysis	1	40	21	2	1	65
Collection size by subject and/or format	6	24	24	7	3	64
Collection growth	1	38	17	4	4	64
Collection currency and age	7	11	23	7	15	63
Total Respondents	10	53	39	14	18	66

If you selected "Another interval" above, please specify the method and the interval. N=41

Again, the interval depends on the level of evaluation. Our annual reports track size and growth of the collection; our annual budgeting process scrutinizes expenditures. But there are aspects of each of these that are ongoing processes.

Analysis for weeding

Another interval: 5 years; Budget: constantly

As dictated by space needs

As needed (6 responses)

As needed to answer questions. We did a broad-based review of collection size and allocation by subject once in the past ten years.

As needed, some not usually as frequent as annually, some more than annually

At least quarterly if not monthly

Budget analysis is conducted throughout the year, plus additionally as needed.

Collection assessments and evaluations are an integrated part of the Libraries' collection management process. As such, assessments and evaluations are performed on a continuous basis using various methods.

Collection currency and age: criteria used by reference/subject librarians according to their own weeding schedule. Collection growth: we used this method in 2006, 2011, and 2012.

Collection growth reports were introduced when I started in 2014. Prior to this no collection growth reports were developed or generated.

Collection size and growth studies have been conducted twice in the last 10 years.

Collection size by subject and/or format: semi-annually; Collection budget analysis: monthly and quarterly; the others are ad hoc.

Collections budget analysis: weekly, Excel spreadsheets

Collections budget analysis: monthly; collection growth: as needed

Collections budget analysis: every three years

Depends on the project

Each of these are done at least annually, but may be done more frequently in support of specific projects or to answer specific questions.

Every few years we measure the collection currency and age.

In all cases this varies from annually to as requested, often in connection with collection management projects.

Irregularly, as needed, and as time permits. We do these activities on a somewhat ongoing, somewhat sporadic basis, sometimes more frequently than annually, sometimes less often.

Many of these processes occur on an ad hoc/as needed basis.

Methods vary, interval of 2–3 years

Monthly tracking of expenditures

More ad hoc: dependent on requests from individual departments, reaccreditation of said departments, annual departmental reviews (some departments more actively engage the library than others).

Mostly monthly

On-demand intervals, for use in new library building planning

Ongoing, as needed

Periodic evaluation of portions of the collection for currency has been undertaken on a project basis.

Size: as needed; Currency: as needed

Sporadically

We are currently creating the process.

We have analyzed collection growth once when doing a long-term space plan.

We have started using Ex Libris Alma and the interval is as needed.

Where selected, “another interval” should be read as “as and when required.”

Qualitative, collections-based N=65

Method	Once	Annually	Another interval	Plan to use	Never used	N
Peer library comparisons of overall library measures	8	18	17	4	17	64
Peer library comparisons of title holdings	8	6	30	8	12	64
Direct or visual evaluation	4	5	34	5	16	64
Conspectus	12	0	6	2	43	63
Global citation analysis (e.g., impact factor)	6	4	22	10	21	63
List checking	2	6	27	4	24	63
Accreditation guidelines	3	7	45	0	8	63
Brief Tests of Collection Strength	2	1	11	5	42	61
Total Respondents	26	32	53	23	58	65

If you selected "Another interval" above, please specify the method and the interval. N=48

Accreditation guidelines have been used for/as demanded by accreditation reviews of individual schools or departments.

Ad hoc based on the project

Ad hoc, as needed for other projects

Again, methods such as global citation analysis, have been performed a number of times, but not on a regular basis.

All methods for which "Another interval" is selected = the interval depends on the discipline and on the subject/reference librarian.

As needed (9 responses)

As needed by selector

As needed, some not usually as frequent as annually, some more than annually

As needed; LibQUAL+, WorldCat, Mono vendor platform

Citation analysis used in journal survey conducted in 2014. List checking via spreadsheets as needed. Peer library comparisons of title holdings as needed. Accreditation guidelines as needed. Direct or visual evaluation as needed.

Collection assessments and evaluations are an integrated part of the Libraries' collection management process. As such, assessments and evaluations are performed on a continuous basis using various methods.

Conspectus was used in the past regularly. Global citation analysis is used in some disciplines regularly but not in others. Peer library comparisons of overall library measures and holdings are done when a project arises within one of our consortial partners. Accreditation guidelines are done as required by the university.

Conspectus: we used this multiple times in the past, but not in the last ten years. Global citation analysis: occasionally, project based. List checking: occasionally, project based. Peer library comparisons of title holdings: rarely, but not quite never. Accreditation guidelines: when requested by individual departments at our university. Direct evaluation: occasionally, project based.

Depends on the project

Every 5 years; when schools need accreditation assistance

Every few years

For accreditation it depends on what is being accredited.

From a top-down view, qualitative assessment has been virtually absent in our library. Individual subject librarians perform these kinds of assessments fairly regularly.

Generally based on aspirational peers & looking at data related to specific product or discipline: ad hoc project based

Global citation analysis; list checking: upon request. Brief tests of collection strength; accreditation guidelines: as required for unit reviews (university-based). Direct or visual evaluation: as needed, e.g., for major moves of collections

Global citation and list checking are ad hoc. All methods are used by a small groups or individual subject librarians.

Global citations: Academic Analytics and Web of Science (when needed). Peer comparisons: every 3–6 years using OCLC data. Accreditation: only when needed. Direct evaluation: project specific and when needed.

In all cases this varies from annually to as requested, often in connection with collection management projects.

In most cases another interval is done upon request/ad hoc. Accreditation is done per accreditation cycles.

Individual collection managers conduct these evaluations on an as-needed basis. The Libraries does not currently conduct these evaluations at an institution-wide level.

Irregularly, as needed

Many of these processes occur on an ad hoc/as-needed basis.

Mostly as needed. Some of the above, such as accreditation guidelines are conducted on regular intervals, but others are conducted on an ad hoc basis.

On occasion

Ongoing, as needed

Other intervals refer to portions of the collection, on a project basis.

Peer library: as needed. Direct evaluation: multiple annually

RLG Conspectus was completed several times years ago. Accreditation guidelines have been used for individual school accreditations.

Used on ad hoc basis for specific projects.

Varies, as needed

Various selectors have used global citations analysis, list checking, and visual evaluation in various projects at time of need. We do accreditation evaluations as the colleges/units need them.

We use impact factor to make selection and renewal decisions, but have not done a global review based on impact factor. We've done small-scale analysis with peer comparison and department level accreditation reviews.

We were an active participant in the RLG Conspectus in the 1980s and 90s. We have used LibQUAL+ surveys in the past, which include comparisons to peer libraries. Collection analysis in connection with our 2CUL partnership with Columbia and other collaborative collection development initiatives have included comparisons of holdings, but these have been undertaken on a project basis. Visual evaluation has played a role in decision-making around remote storage—this has also been mainly project-based. I am not aware of systematic recent use of list checking or brief tests, although individual selectors may use variations on these methods from time to time. Impact factor and similar measures are used, in some cases, in cancellation decisions, but we do not systematically track citations for collection development purposes.

When relevant

Where selected, "another interval" should be read as "as and when required."

Quantitative, user-based N=66

Method	Once	Annually	Another interval	Plan to use	Never used	N
Circulation by subject or format	2	23	34	4	3	66
Interlibrary loan requests by user groups	2	28	24	9	3	66
Usage of electronic resources statistics	0	41	24	1	0	66
Circulations by user groups, subject, and format	2	21	27	5	10	65
Local citation analysis studies	8	6	21	12	17	64
MINES for Libraries© responses	6	0	4	2	51	63
Gap analysis	3	7	12	10	30	62
Total Respondents	20	50	50	29	60	66

If you selected "Another interval" above, please specify the method and the interval. N=44

3–5 years or as needed for specific projects

Ad hoc: all methods are used by a small groups or individual subject librarians.

As needed (8 responses)

As needed basis, particularly when deciding on the retention or cancellation of a resource. Gap analyses are provided to us by a vendor or publisher on request.

As needed by selector or group

As needed to answer questions

As needed, some not usually as frequent as annually, some more than annually

As needed; through our provincial consortium, World of Science/Scopus, Decision Center, publisher platforms, RACER (ILL software)

As needed. Reports from ILS are used to look at circulation data; Illiad reports used for ILL data.

As needed/requested

Circulation by subject or format: as needed for projects or to answer specific questions. ILL requests: 2x/year. Usage of e-resources: statistics are harvested monthly and analyzed annually or as needed for projects or to answer specific questions.

Circulation by subject done in branch libraries via collection print outs; Circulation by users conducted.

Circulation by subject or format is being done as part of a project with our consortium.

Circulation by subject or format: frequently but sporadically. Circulations by user groups: occasionally, project based. Local citation analysis: occasionally, project based. Interlibrary loan requests: occasionally, project-based. Gap analysis: we participate in LibQUAL+ every 3–4 years. Usage of electronic resources: occasionally, project based.

Circulation by subject or format: the interval depends on the discipline and on the subject/reference librarian. Usage of electronic resources statistics: before every renewal.

Circulation data used as needed for determining items to go to storage. Interlibrary loan data used in serials review process which will become an annual exercise in FY17.

Circulation reports we have done every 2–3 years, and local citation analysis has been done in conjunction with published research projects. We do analyze ILL requests but not by user group at this time, though that is a goal in the future.

Circulation: by using Sierra and only as needed

Circulations by user groups, subject, and format: periodically to measure trends

Collection assessments and evaluations are an integrated part of the Libraries' collection management process. As such, assessments and evaluations are performed on a continuous basis using various methods.

Constantly

In all cases this varies from annually to as requested, often in connection with collection management projects.

Interlibrary loan requests are evaluated quarterly.

Irregularly

Local citation analysis studies as needed, at the individual selector/subject level; some discussion about doing this more broadly and frequently. Usage stats collected monthly.

Local citation analysis studies are ad hoc; all the rest would be monthly.

Look at those stats quarterly.

Many of these processes occur on an ad hoc/as needed basis.

MINES for Libraries conducted as part of overhead/cost analysis study. Circulation data analyzed on demand via ILMS reporting system.

More granular circulation data is available, but usually only aggregate circulation numbers are reported. However, we have been engaged in gathering annual statistics on the use of approval titles. More granular data on e-resource use may be facilitated by further development of a querying/reporting method to accompany our EZproxy implementation. Local citation analyses studies are selectively used, again department/subject librarian initiated. If by "usage of electronic resources statistics," one means data such as COUNTER and COUNTER-like statistics from vendors, then this is collected annually (that is the assumption).

Ongoing, as needed

Project based

These are driven by projects during the year. Some are driven by renewals, etc.

Used occasionally

Used on ad hoc basis for specific projects.

We track circulation of print materials and keep stats, including anonymized demographics (school/department, patron status). This data is collected on an ongoing basis, but only analyzed on a project basis. We now get most of our COUNTER stats on e-resource usage via ProQuest's Intota; these are delivered twice a year.

Where selected, "another interval" should be read as "as and when required."

Qualitative, user-based N=65

Method	Once	Annually	Another interval	Plan to use	Never used	N
Comparison of holdings with readings in course syllabi	5	2	23	10	25	65
Mapping the collection to courses and research centers	2	3	11	18	31	65
Input from faculty/staff/researchers	2	11	45	4	3	65
Input from librarian	1	16	45	1	2	65
Input from students	3	8	43	3	7	64
Total Respondents	9	22	54	20	38	65

If you selected "Another interval" above, please specify the method and the interval. N=46

Ad hoc

All categories marked "Another interval" are done on a continuous basis.

As needed (6 responses)

As needed, some not usually as frequent as annually, some more than annually

As needed. Input from librarians received regularly, but not in a scheduled manner.

Collection assessments and evaluations are an integrated part of the Libraries' collection management process. As such, assessments and evaluations are performed on a continuous basis using various methods.

Collection managers use input from constituents on an ongoing/as needed basis.

Comparison of holdings with readings in course syllabi and mapping the collection to courses and research centers is done as needed by the liaison librarians.

Comparison of holdings with readings in course syllabi: initiated a couple of times at irregular intervals. Input (three methods): faculty/staff/researchers, librarians, students are not officially invited to give their input during an assessment activity, but some of them contact us to offer it.

Comparison of holdings with readings: occasionally, project based. Input from faculty, librarian, students: in addition to LibQUAL+, we conduct both formal and informal surveys of these groups on an occasional basis.

Comparison with syllabi: as needed/desired, at the individual selector/subject level. Input from librarian: occasional, reasons vary.

Comparison with syllabi and mapping to courses is done at the selector/discipline level. Input from faculty, staff, students, and librarians (other than selectors) is done through a suggest-a-purchase form that acquisitions automatically fulfills based on pre-defined criteria.

Comparison: use sampling of the courses and only when needed

Every three years for LibQUAL+; as needed by survey or direct communication

Faculty and students are surveyed every three years (the second survey was conducted this year). I'm unclear on the 'input from librarian' category, as our librarians are constantly analyzing the collections from various perspectives.

For the first two: on occasion; for the 3rd and 4th: in real time we take feedback, requests for purchase or if someone gives us feedback.-

In all cases this varies from annually to as requested, often in connection with collection management projects.

In-house survey similar to LibQUAL+ has been expanded to include questions about collections and is conducted every three years.

Input from faculty/staff and librarians is solicited in serials review process, which will become an annual exercise in FY17. Faculty, staff, and students are constantly providing suggestions for the collection via an online form on the library website.

Input from faculty/staff/researchers/students used to be collected annually by way of a survey (and supplemented by focus groups and/or interviews), but this survey is on hold at the moment.

Input is gathered approximately every three years in our LibQUAL+ survey.

Input whenever needed or received from library patrons

Involved faculty in weeding and purchasing decisions. Recommend-A-Book and LEAP requests both used.

Irregularly and not systematically

LibQUAL+ every three years

Many of these processes occur on an ad hoc/as needed basis.

Mapping the collection to courses and research centers: to align with the university's strategic research directions. Input from faculty/staff/researchers; Input from librarian: upon request

Occasionally by reference staff

On demand; feedback received via e-mail or request forms

Ongoing

Ongoing, as needed

Qualitative input about collections is formally solicited from faculty/staff/researchers and students via LibQUAL+, but we also receive and consider informal input from these groups throughout the year. We receive qualitative input about the collections from librarians frequently.

Subject liaison librarians are directly involved in collection development. Input from faculty, staff, and students is encouraged and aids in decision-making throughout the Libraries. The Libraries have formal faculty/staff and student advisory groups for this purpose.

These are continuous.

This is primarily carried out by our selectors.

Varies

Varies, as needed

We actively listen to faculty and students.

We gather input from patrons on an ongoing basis.

We survey students every 2–3 years to get their input. We gather input from faculty in a variety of ways, from liaison contact to a survey every 2–3 years. Liaisons/selectors review syllabi every semester, and continuously offer input.

Where selected, "another interval" should be read as "as and when required."

Please briefly describe any other collection assessment method your library has or plans to use. N=13

Altmetrics data collection, in-house use data

Collections analysis by call number

Comparison with course lists from the university bookstore

Have just started several evidence-based pilots. Will look at use.

Participating in a CRKN initiative to look at journals, based on usage statistics, citation analysis for the institution, and faculty indication of required journals.

Ratio of circulation to ILL borrowing statistics for books

Several years ago, we evaluated multi-year acquisitions on our central approval plan for English-language print books, analyzing average cost per book circulation by publisher. We also carried out a broader study of print monograph usage across the library system. The study looked at 20 years of circulation data and, among other things, tracked cohorts of books acquired in a single year over multiple years, which revealed a rather long (12-year) interval during which books in a cohort are actively charged out for the first time. The print usage study also included analysis of circulation by various patron demographics, which were captured (and anonymized) in a single-day circulation "snapshot."

Sustainable Collection Services GreenGlass, Colorado Alliance of Research Libraries Gold Rush

We are actively developing an organizational structure, functional set of responsibilities, and procedures to support a more formal program for collection assessment.

We are developing a tool that should help us consolidate the various data sets we have about our collections and generate reports from the relationships between all of the data.

We are going to do a survey started at the University of Montreal, where you look at the top cited journals in various disciplines, you ask the faculty their top 10 journals in their field, and then you compare both to the usage statistics. This can help you identify what journal you need and which you might discontinue subscribing to. We plan to do this next fall.

We did an in-depth study of our big deal journal packages and also studied the correlations between COUNTER use data and click-through data from our A-Z lists and faculty citation data.

We plan to increase assessment of e-book use.

41. For each of the commercial collection analysis tools listed below, please indicate whether your library currently uses it, previously (but not currently) used it, has never used it, and/or would be interested in using it in the future. Check all that apply. N=65

Tool	Currently use	Previously (but not currently) used	Never used	Would be interested in using	N
YBP Gobi Peer Groups	30	11	14	11	63
OCLC Collection Evaluation/Analysis System	9	33	15	6	62
ProQuest's Intota Assessment	12	1	36	11	60
Bowker Book Analysis System	0	9	47	3	59
Other tool	16	5	8	7	32
Total Respondents	43	42	54	25	65

If you selected "Other tool/Currently use" above, please specify the tool(s). N=19

360 COUNTER; custom reports from approval plan vendors

Brioquery and Cognos to query the data warehouse, Tableau for visualization, GreenGlass from OCLC Sustainable Collections

CRL's PAPR analysis tool is being used consortially. OCLC has created a custom analysis for us on request.

Ex Libris, Alma and Altmetrics

Gold Rush (2 responses)

GreenGlass

GreenGlass, EBSCO Usage Consolidation

ProQuest Ebook Central

SCS GreenGlass

Serial Solutions for overlap analysis

Sustainable Collections' GreenGlass collection analysis tool

Tableau

The Colorado Alliance of Research Libraries has developed an online holdings comparison tool so that we can identify overlap and unique holdings within our consortium.

Ulrich's GreenGlass (Sustainable Collection Services)

We have purchased SCS (GreenGlass) system, specifically for use in planning for potential deselection and planning for new library collection management.

GreenGlass provided by OCLC

OCLC Sustainable Collection Services

We recently investigated Worldshare Collection Evaluation. It appears OCLC is not investing resources to expand the tools capabilities. We have of course initiated conversations with Sustainable Collection Services, which is now owned by OCLC.

If you selected "Other tool/Previously used" above, please specify the tool(s). N=5

Ulrich's Serials Analysis

Ulrich's Serials Analysis System

UStat

We previously used Ulrich's Serials Analysis system.

WorldCat Collection Analysis

If you selected "Other tool/Would be interested in using" above, please specify the tool(s). N=6

Counting Opinions LibPas

GreenGlass, OCLC's GIST

libAnalytics

OCLC GreenGlass

OCLC Sustainable Collection Services GreenGlass

Sustainable Collections tool

42. Is your library using any freely available data to make collection comparisons? N=62

Yes	8	13%
No	54	87%

If yes, please briefly describe the data set. N=8

ARL and IPEDS statistics

CUFTS, lists from vendors, DOAJ holdings

Locally developed tool by a peer university to compare databases' coverage (similar to Gold Rush). Two members of our committee have a privileged access for now.

Portfolio holdings

Several sources, as an example, IPEDS data

SNIP, IPP and SJR metrics, Bergstrom-McAfee Data

Usage data available from publishers/vendors

We use OCLC Expert Search to compare our holdings to those of other institutions.

43. Are there tools for data analysis that you would like to have at your institution that do not currently exist? N=57

Yes	19	33%
No	38	67%

If yes, please briefly describe what this tool would do. N=16

A comprehensive tool to compare print and electronic holdings for purposes of overlap analysis with an impact on budgeting, physical space, and user needs. A real-time cost/usage report with reliable data. A tool that connects research, teaching, and learning outcomes to collection usage and management.

A fully integrated ILS

A tool that would assist in comparing freely available collection datasets from other institutions with our own would have some value.

A tool that would provide comprehensive analysis of the entire collection.

A tool to bring various assessments together.

As before, I'm not familiar with all tools, so I can't say what doesn't currently exist. Much of our analysis is based on home-grown methods rather than commercial analysis tools.

As I mentioned earlier, we are interested in a tool that would help us analyze our catalog better for our print collection—easy reports on circulation by subject, etc.

Compare use statistics, impact factor, LJUR data and other journal metrics and information across publisher, by call #, by research subject area. Same type of tool to compare ebook statistics from different publishers or platforms like EBL and compare stats across the board by publisher, platform, call #, subject areas, etc.

I would love a tool that would scrape the citations from our faculty's and researcher's publications (including monographic publications) and compare these against our holdings.

It would be useful to be able to more easily compare holdings, usage, new acquisitions, and collections expenditures among library consortium partners, with ability to look at facets such as language of publication.

Open source data visualization tools

Probably, I just don't know what it might be at this time. But I'm always looking for new tools to make some of this analysis easier.

Take proxy data & parse by user group, evaluate collections through administrative partners—sponsored programs, student support services, spin-off research companies, patents, allow direct correlations to student/researcher success

Tool that could help analyze e-resource content by subject.

Upload and compare two lists to identify overlap with library holdings.

We would like to build a web-based dashboard to give collection development staff and others real-time interactive access to data about our collections and their use.

COLLECTION ASSESSMENT RESULTS DISSEMINATION

44. To whom and how are the results of collection assessments disseminated? Check all that apply. N=65

Constituent	Library website	Library intranet	Institutional repository	Print or PDF report	In-person presentation	N
Library administration	13	44	3	55	46	63
Manager of collections/ department head collection development	10	43	2	53	43	63
Subject specialist librarian	7	42	3	49	37	62
Library staff	12	45	2	37	35	59
College dean, vice-president, or president of the college/university	9	2	1	37	43	51
Department or faculty that initially requested the assessment	7	10	2	39	27	50
Faculty governance committee for the library	4	5	0	33	42	45
General public	30	1	2	9	5	34
Other constituent	1	0	0	4	4	5
Total Respondents	32	51	5	60	60	65

If you answered "Other constituent" above, please specify the constituent category and the method of dissemination. N=5

Library website N=1

Alumni: library news updates

Report/Presentation N=4

Colleagues at other institutions

Grant & Foundation reports, for example, Title VI or Korea Foundation

Includes grant seeking entities and Board of Councilors

Presentations to National Council, which includes many donors

Additional comment N=1

Can't answer much of this at the present time but we plan to openly and widely disseminate data/findings.

45. Please indicate the formats of dissemination used. Check all that apply. N=65

Presentations/slide-shows	61	94%
Graphs, charts	61	94%
Formal written, text-based reports	60	92%
Written summary	57	88%
Interactive visualization/dashboard	29	45%
Other format	4	6%

Please briefly describe the other format. N=4

Excel spreadsheets

Raw data (e.g., usage reports for e-resources)

Spreadsheets

Spreadsheets and verbal dissemination

46. How accessible are the resulting raw and summary data for use by other related stakeholders? Please make one selection for raw data and one selection for summary data. N=64

Level	Unprepared/Raw Data	Summary Data	N
Most, if not all data is made accessible upon request.	22	21	34
Most, if not all data is easily accessible directly to stakeholders.	1	20	21
Some data is accessible upon request, other data not accessible at all.	13	8	17
Some data is accessible directly, other data upon request.	9	10	12
Most data is not accessible at all.	11	3	11
Other situation	2	1	2
Total Respondents	58	63	64

If you selected "other situation" above, please briefly describe the situation. N=2

[Unprepared/raw data is] available to a limited few.

The data is made available in both forms for library staff. For faculties and such it would more likely be the summary data, unless a researcher or special request was made to obtain the data.

Additional comments N=2

Data is accessible directly to library staff, but is not "easily" accessible. You have to know how to use the software to query the data warehouse. Data related to formal presentations and reports have the source data documented and it is available on request.

We want to make all data open and available for whoever wants to see it.

COLLECTION ASSESSMENT OUTCOMES AND CHALLENGES

47. Please indicate the types of changes that have been a result of assessment of the library's collections. Check all that apply. N=64

Increased understanding of the scope and breadth of collections by subject and/or collection management librarians	55	86%
Modifications to collection development priorities or policies	50	78%
Additional funding targeted to enhance or build a collection	40	63%
Collaboration with subject librarians and academic faculty for enhancing collections	38	59%
Increased understanding of the scope and breadth of collections by faculty and/or campus administration	37	58%
Increased funding for the overall library's collection	25	39%
Development, modification, or elimination of subject-based funding algorithms or formulas	18	28%
Other change	8	13%

Please briefly describe the other change. N=8

Assist decision-making around the transfer of library materials to off-site storage.

Better partnership with consortia; better package deals purchased

Cancellation decisions due to reduced purchasing power as a result of an unfavourable currency exchange rate.

Deselection and cancellation decisions

Deselection, relocation of materials; changes in choice of format to purchase (print or electronic); adjustments to approval plans

Shift in format from print to electronic

Unable to say at the present time.

Weeding or other transfer of physical holdings to remote storage.

48. Please briefly describe any other ways assessment has been used to sustain and grow your library's collections. N=14

Assessment has primarily been used to facilitate the cancellation of resources.

Collection assessment projects have been essential in supporting shared collecting initiatives with partner libraries, particularly our "2CUL" partnership with Columbia University Libraries and the member libraries of the Borrow Direct/Ivy Plus consortium.

Consortial collection comparisons, collaborative retention/long-term storage agreements. Shift from approval plans/just-in-case to DDA/just-in-time purchasing.

Continuing to build a culture of assessment with librarians asking questions of the data, and what it means for collection development decision making.

Currently reverse applying weeding criteria to identify high needs areas of the collection for management.

Deciding the location of print collections (on-site, off-site, branch libraries).

Ensuring we're meeting the needs of our students and faculty.

Fund raising compact shelving and other collection management equipment

It is central to our academic program reviews and to strategic budget requests.

Most assessment actions have been related to evaluation of resources for cancellation or retention. Also a bit of energy for weeding and relocation to high-density storage.

Ongoing assessment of continuing resources is used to reallocate funds toward interdisciplinary resources.

Successfully advocated for preservation environment offsite storage facility.

To make decisions about deselection and shared storage.

Used to justify increased support for collections budget.

49. **Please briefly describe up to three challenges your library has encountered when assessing collections. Include any methods that were successful in overcoming that challenge.** N=54

Ability to integrate collections data with institutional data

Ability to quickly create detailed and varied reports—need more technical statistical analysis skills

Assessment is not tied to strategic goals, so recommendations are not necessarily followed.

Assessments are very time-consuming.

It is difficult to gather some necessary data.

There can be disagreement on what is relevant data.

Collecting COUNTER data from publishers.

Lack of "extra" data variable, e.g., subject codes/BISAC codes and LC call numbers

Collection space: ongoing analysis based on space reports and collection review

Collection funding: some success with shared funding of some journal packages

Complexity

Lack of tools

Lack of dedicated staff

Consistency and acceptance of data sources and collection methods

Resistance to evidence based/data driven collection development and management

Lack of dedicated resources and staff

Consistency and efficiency of collection data: hiring of assessment officer

Sharing of results: hiring of marketing person

Consistent data

Time

Too many locations of data

Consistent means of collecting and reporting data/findings

Strategic use of data to support institutional goals and objectives

Coordination of multiple parties' time and effort

Cost of comprehensive assessments

Data for consortial acquisitions can be challenging to parse.

Even with data, there can be many other factors that can influence good decisions when it comes to collection development.

Cross-departmental communication. Created position to help communicate between public and technical services.

Lack of system interoperability

Lack of consistent usage data, changing usage standards, vendors who do not adopt usage standards.

Current integrated library system was designed for handling print materials; compile data for assessment using a variety of library and university systems.

Concerns with the reliability of vendor-supplied data; double check data and disregard as necessary.

Different systems provide a different numbers, which restricts our ability to pull comparable data.

Current workflows don't produce data that is consistently reliable or legible in the asbtract.

Current systems don't allow robust aggregation/analysis/reporting of our collections data. Solution: extract and manipulate the raw data using other tools.

Administrators at the university level largely deaf to evidence of need as presented by the library.

Data volume and size of collections

Lack of compliance with standards (e.g., COUNTER)

Data quality and integrity

Determining who/when is using certain e-collections more heavily (might be mediated by the use of EZproxy logs, although there are limitations as to how deep one can go into a particular resource).

Data over time is difficult, since we have changed the ILS a number of times, and not all data was migrated, and querying the underlying database must be done in another fashion.

Difficult to combine data/statistics from different sources without a lot of manual labor

Difficult to describe/present the outcomes of data analysis without spreadsheets

Not having good benchmarking data for meaningful comparisons

Difficulty parsing data from MARC bibliographic records

Each assessment project differs in the type of data it requires. Therefore, although we collect a lot of data, we don't typically have precisely what is needed for a particular project. This means that we often have to gather or reorganize data in a different way for each project, which is time-consuming and labor-intensive, and cuts down on the amount of assessment we can undertake.

Although our assessment projects nearly always contribute in a general way to an enhanced understanding of how our collection is perceived and used by our faculty and students, it can be difficult to turn that understanding into specific actions.

Electronic resource usage data that is not COUNTER compliant

Insufficient staff to manage collections data

Insufficient time for analysis and also for training liaisons in analysis

Funding

Space

Gathering use data can be difficult if vendor does not supply COUNTER reports. Their analysis is sometimes complicated by messy data and incomplete title lists.

In the context of a very large research collection, overlap analysis is a key aspect of collections assessment projects, and this is a resource intensive undertaking.

Since our institution is so large, even the smallest collections receive high use.

Getting selectors actively engaged. Have not overcome that challenge.

Data: there's both a lot and not enough. Bad records make it impossible to do good comparisons. Have not overcome that challenge.

Staff using the data that is gathered to make decisions. Have not overcome that challenge.

Having the time to analyse the data

Being able to have meaning reports about e-resources usage

Moving to a culture of evidence-based decisions with the data to assist/drive collection development when we know past decisions resulted in collections where 80% weren't used.

Historical lack of assessment

Historical difficulty acquiring raw data from vendors, ILS department

Inconsistent data

Lack of time and dedicated staff

Large quantity of data

Inconsistent data or bad match points. We have used OCLC and other APIs to attempt to make data more consistent.

Getting data in the first place. Persistence on a case-by-case basis was our only solution.

Integrating data from different sources: overcome with analytical programming skills

Presenting data from multiple sources in a manner that allows faculty input in collections review: overcome by combining skill sets across departments.

Forecasting physical collection growth: overcome with analytic programming skills

It is difficult to collect and analyze data produced from many different sources.

Lack of reliable unique identifiers across data sources makes it difficult to bring data together for analysis.

Difficult to extract and interpret data from our largest systems.

Information in our systems (e.g., ILLIAD and ILS and OCLC) is a mess, inconsistent. Springer's breach this spring calls into question the veracity of COUNTER stats from vendors.

Lack of time and people is a challenge, so we will shortly be recruiting for an assessment librarian who will work on collections and other types of assessment.

We have cut collections and lost purchasing power over the last decade, so we are focusing on defining what core resources are needed and how much money is needed for the core.

Lack of skill on using Access and other programs is a personal challenge.

Lack of time to do a proper assessment

Difficulty in obtaining data/reports needed

Staff don't always have sufficient expertise with Excel to analyze data

Limited access to data: circulation and in-house use

Migration to a new ILS impacted comparable data reporting

Comparability between print and electronic measures

Not always having a standard identifier in the record, for example ISBN or ISSN numbers

Negotiating the political dimension of assessment; for example, some users believing assessment decisions reflect the extent to which the library values and supports particular fields of research. We try to address this through clear and abundant communications and through transparency.

Communicating the complexities of purchasing models and restrictions to decision-makers and other stakeholders. We've tried to address this through the creation of glossaries of terms and very careful and thoughtful contextual details related to resources under evaluation.

Messy data. Oftentimes, the data that is used to inform assessment decisions is messy, inconsistent, problematic, and full of caveats.

Non-standard data, data integrity issues in general

Access to complete financial data

Incomplete vendor data or non-standard compliant data

Non-COUNTER usage statistics

Reliable vendor statistics

Cost/per use analysis within consortia

Not enough staff/librarian time

Not enough technology support, need software we don't have

We do additional work to collect data to tell the story, but it doesn't translate to additional funding; so it is worth all the work?

Overcome selector biases to data. Methods to overcome this challenge include exposing subject librarians to data, transparency in how data is being use, and training.

RDA. Problems with the standard in analyzing collections by publisher and subject. Problems have not yet been overcome.

Scale. Collection assessment tools are not up for the job. The size of our collections make them difficult to analyze.

Overwhelming number of subject areas to assess

Limited staff time to perform assessment activities

No systematic, individual tool—requires multiple tools and approaches

Staff shortage

Lack of data analysis expertise

Staff shortages

Time constraints

Staffing. We were among the first research libraries to create a Collections Analyst position, but we lost the position when the incumbent retired. As described above, we are exploring options for distributing collection assessment tasks among staff in various library units. These units have been involved in aspects of collection assessment all along, so this is partly a matter of more closely defining as well as enhancing existing work and also improving coordination. We expect a successful outcome, but it will still be a challenge to match the focused attention of a dedicated, collections-specific position.

Tools. We need automated tools that allow different library stakeholders to quickly and easily generate various tailored, real-time reports that provide integrated views of holdings, acquisitions, usage, expenditure, and budget data.

Purpose and implementation. It is a challenge to understand the conclusions to draw from collections assessment, how to act on the data wisely and with appropriate attention to specificities of academic discipline.

Support from the vendor (e.g., Intota Assessment): Vendor level of customer support was poor. A formal complaint was filed and the issue was resolved.

Outdated credentials on provider admin portals: Credentials expire or platforms change resulting in lost access to provider platform admin sites and usage statistics. Synchronizing between publisher and the provider they use is poor.

Responsibility for assessing collections is assigned to collection librarians with varying levels of skill and engagement in assessing the collections. Cross training or assigning an individual or individuals to this task would ensure ownership and quality of the results.

Systems that do not transfer data, for example e-collection cost data from Aleph to Intota Assessment

Gaps in data that are not obvious

Difficulty reporting electronic and print collections together

The raw data is only accessible to a limited number of people.

Insufficient or lacking underlying data hinders comprehensive analysis.

There are an overwhelming number of resources to evaluate and a lack of staff coordination, time, and interest.

Not all data are COUNTER compliant, in the same format, or are measuring the same things. Some platforms offer no use data.

There is a lack of transparency and pricing models on the part of collection providers/vendors.

Time

Personnel to manage assessment

Expertise to manage assessment

Time (to identify, collect, analyze, disseminate, and put into action results of analysis)

Technical skills distributed by enough staff to maximize use of data and analysis for assessment

Lack of centralization for vendor-provided data resulting in silos, making analysis more difficult

Time limitations have been reduced by increasing staff and faculty hours in assessment.

Understanding historical practices for collection assessment.

Resources to encourage an expectation of assessment, this includes personnel and collaborating across teams.

Documentation

Unreliable statistics from vendors

Vendor inconsistency in providing/presenting data

System migration causing loss of data

What do, or can, e-resource usage statistics tell us about user satisfaction?

It is difficult to accurately connect cost data with usage data, especially with journals available on multiple platforms (or where the publisher has changed platforms over time) and connecting this with overlap analysis.

How can we derive meaningful comparisons from disparate usage data: COUNTER vs. non-standard, e-book vs. print circulation.

COLLECTION ASSESSMENT SKILLS

50. Have library staff received formal training in collection assessment or evaluation? N=65

Yes	28	43%
No	37	57%

Yes N=12

ALCTS Fundamentals of Collection Assessment online course

ALCTS professional development online course and several webinars

All librarians with collections responsibilities have received training in using GreenGlass.

Library staff have participated in technology trainings as well as a data science short course.

Mentoring, webinars and seminars, workshops—locally and at conferences

More training would be useful.

One staff member has received formal training in assessment, although not specifically for collection assessment.

Really: Yes and No. Our selector training and continuing education covers aspects of collection assessment, but we do not offer systematic or stand-alone training in collection assessment.

Some

Training for specific tools and/or project based

Two librarians on the assessment committee have completed the ALCTS Fundamentals of Collections Assessment course.

Yes some people have received training, nothing very recent.

No N=8

Certain individuals have expertise but there has been no over-arching effort to train personnel.

Informal training has included vendor-provided training, webinars, and conference sessions,

Library staff generally have not received formal training. The Collection Assessment Librarian has received some formal training.

Most learned on the job.

Planning for this is underway.

Some individuals have received specialized training, as required for their work.

Some staff have been trained or have sought out training, others have learned in-house.

We are planning for this.

51. Using a scale of 1 to 11, where 1 = Most Important and 11 = Least Important, please rank the skills or knowledge needed by library staff for collection assessment or evaluation. Click on the arrow to select a number or drag each choice into the desired order of importance. N=65

Skills/Knowledge	1	2	3	4	5	6	7	8	9	10	11	N
Collection development principles	10	15	15	6	6	5	2	3	1	1	1	65
Excel/spreadsheet	2	3	12	14	13	10	8	2	0	1	0	65
Access/database	0	1	0	2	5	5	9	11	8	20	4	65
Statistical analysis	0	2	2	9	5	8	7	17	10	3	2	65
Analytical/critical thinking	26	15	10	6	3	4	0	0	0	0	0	64
Data visualization/ chart-making	0	0	0	3	8	9	10	11	13	9	1	64
Subject expertise	5	7	5	4	4	8	4	6	14	7	0	64
Knowledge of publishing industry	0	2	4	4	8	7	10	5	8	14	2	64
Collection assessment/ evaluation principles	19	15	10	12	4	0	1	1	1	0	0	63
Data management	1	3	6	4	8	6	13	8	9	5	0	63
Other skill or knowledge	1	1	0	0	0	1	0	1	1	5	44	54
Total Respondents	64	64	64	64	64	63	64	65	65	65	54	65

Skills/Knowledge	Rating Average	N
Analytical/critical thinking	2.33	64
Collection assessment/evaluation principles	2.71	63
Collection development principles	3.65	65
Excel/spreadsheet	4.72	65
Subject expertise	6.09	64
Data management	6.40	63
Statistical analysis	6.86	65
Knowledge of publishing industry	7.16	64
Data visualization/chart-making	7.53	64
Access/database	8.18	65
Other skill or knowledge	10.37	54

52. **Using a scale of 1 to 11, where 1** = Most Needed and 11 = Least Needed, please rank the skills or knowledge needed by library staff for collection assessment or evaluation. Click on the arrow to select a number or drag each choice into the desired order of importance. N=46

Skill/Knowledge	1	2	3	4	5	6	7	8	9	10	11	N
Collection development principles	8	12	8	6	1	5	0	4	1	1	0	46
Collection assessment/ evaluation principles	17	12	4	4	8	0	0	1	0	0	0	46
Data management	0	3	5	1	6	6	11	9	3	2	0	46
Analytical/critical thinking	15	7	12	3	5	3	1	0	0	0	0	46
Excel/spreadsheet	0	5	7	13	8	4	8	1	0	0	0	46
Access/database	0	0	1	3	3	3	7	9	5	13	2	46
Statistical analysis	1	2	3	6	4	5	5	10	7	2	1	46
Data visualization/ chart-making	0	2	0	5	5	6	7	5	9	6	0	45
Subject expertise	5	1	3	3	2	7	5	3	11	5	1	46
Knowledge of publishing industry	0	1	3	2	4	7	2	3	8	15	0	45
Other skill or knowledge	0	0	0	0	0	0	0	1	1	2	37	41
Total Respondents	46	45	46	46	46	46	46	46	45	46	41	46

Skill/Knowledge	Rating Average	N
Collection assessment/evaluation principles	2.54	46
Analytical/critical thinking	2.76	46
Collection development principles	3.61	46
Excel/spreadsheet	4.59	46
Data management	6.24	46
Statistical analysis	6.46	46
Subject expertise	6.50	46
Data visualization/chart-making	7.00	45
Knowledge of publishing industry	7.58	45
Access/database	7.96	46
Other skill or knowledge	10.83	41

53. **What continuing education opportunities (if any) would be helpful or beneficial for establishing or improving the collection assessment process at your library?** N=29

A class on basic collection assessment methods

Access/database: we consider these to be systems internal to the institution; e.g., Datamarts, finance systems. Excel: increase knowledge from beginner to intermediate and advanced. Data visualization: training in tools such as Tableau.

Advanced statistical analysis

Analytical thinking, data visualization

Business analytics

Data visualization and how to ask the right questions

How to tell an accurate, data-rich, meaningful story with data

I think looking at what other institutions are doing, through webinars or other means, could help move us toward best practices. This SPEC survey request has revealed a need for a greater emphasis on documentation.

Learning of and using new technologies and software programs to demonstrate impact

More training in Excel and data management

MS Excel

Now that we have an office of library assessment we plan to establish a program in support of collection assessment.

Online tutorials for new tools

Opportunities to collaborate with peers at similar libraries for sharing strategies, benchmarking, tool development, etc. Support for methodological applications, understanding accreditation process from a reviewer's perspective, creating connections to student/researcher success.

Possibly basic orientation

Programming, data manipulation, and visualization continuing education

Properly communicating evaluation results to multiple separate audiences

Rather than continuing education, we might benefit more from a consultant reviewing our entire data collection and analysis landscape and making recommendations for how we could make it more efficient and useful.

Statistical analysis training (SPSS or R)

Tableau and other visualization tools, basics of statistical analysis

Tailored/individualized assessment training for subject liaisons, coupled with discipline group feedback, is the path we are currently organizing to grow assessment skills within our library faculty.

Teamwork, Excel knowledge relevant to statistical analysis, statistical analysis in general

Technical application training; opportunities to broaden understanding of collection assessment in general

Training, new software to support assessment, workshops on best practices hosted by ARL

We have conducted a series, "Dates with Data" to improve basic skills with Excel, Pivot tables, and analyzing data sets.

Webinars on planning assessment projects for different types of materials.

Workshops that offer various perspectives—publisher, provider, library. Also hands-on for Excel, visualization, and analysis tasks.

Workshops that speak to the topics rated above.

Workshops/conferences/presentations on how to organize and integrate the collection assessment process to make it more formal.

COLLECTION ASSESSMENT CLIMATE

54. **Using a scale of 1 to 5, where 1** = Not at All and 5 = Very Well, please indicate how well each of the following statements reflects the collection evaluation and assessment climate at your library. Please make one selection per row. N=66

Climate	1 Not at All	2	3	4	5 Very Well	N
Quantitative collections data is the primary means of collection assessment.	0	6	19	29	12	66
Results of collection evaluations are used to make collection development decisions.	1	6	20	21	18	66
Use of collection evaluations has increased in the last 5 years.	4	2	6	21	33	66
The data needed for effective collection assessment is difficult to access or gather.	0	2	29	19	16	66
Stakeholders outside of the library (e.g., faculty, department administration, campus administration) are interested in the results of collection evaluations.	5	16	27	14	4	66
Internal stakeholders (library administration, subject librarians, etc.) are interested in the results of the collection evaluation.	0	1	10	27	28	66
Library administration supports collection assessment.	1	0	5	11	49	66
Total Respondents	10	24	60	57	59	66

55. **Using a scale of 1 to 5, where 1** = Not at All and 5 = Very Well, please indicate how well each of the following statements reflects the attitude toward collection evaluation and assessment in general at your library. Please make one selection per row. N=66

Attitude	1 Not at All	2	3	4	5 Very Well	N
Collection evaluations should be used to adjust allocations of funding for collections.	2	12	17	22	13	66
Collection evaluations are difficult to interpret, understand, or apply.	7	17	19	20	3	66
Quantitative data is more important than qualitative data for effective collection evaluations.	8	9	37	12	0	66
Libraries should share collection analyses and data with others in the field.	2	4	17	23	20	66
Collection evaluation should be a centralized function.	2	9	24	19	11	65
Collection assessment is supported by the theoretical foundations of collection development.	3	6	23	18	15	65
Total Respondents	18	41	62	53	35	66

56. **What is the most successful part of the collection assessment process (regardless of how formal or informal) that is used at your library?** N=48

A few core staff are interested in doing it and do it well.

Academic program reviews

Analyses of the data: local citation analyses, database overlap analyses, cost/benefit analyses

Analyses of use and cost/use are very helpful and used all the time in funding and purchasing decisions; also frequently used to determine which materials stay in campus libraries, which go to remote storage, which get replaced by digital versions.

Analyzing use statistics and helping with accreditation reports

Calculate cost per use for e-resources

Collaboration among colleagues to collect, analyze, and share information

Collaboration and co-operation across departments to retrieve, share, and analyze data

Collaboration and continuous improvement of the process of collection assessment

Collaboration between subject specialists and functional specialists

Collaboration between units (Collection Development, Acquisitions, Information Technology, etc.

Consistent review and demand for data for decision-making

Decentralization of tasks and processes across the department

Electronic resource usage

Faculty and student feedback and requests (needs)

Increased attention placed on continuing resources

Increased awareness of the usefulness of collection assessment within our library over the past two years

Increased standardization

It allowed us to use data to start an EBA e-book program with two publishers. These publishers were identified using ILL transaction logs.

It informs our selection and collection development decision-making process.

One of the most successful parts of our collection assessment process is the ability to combine and concisely present multiple data sources to the university community in order to gather feedback during collections reviews. This feedback can then be integrated into our data-informed collection management strategies. More generally, the fact that assessment is ongoing and integrated into our collecting has also been very successful.

Our collection assessment process is centrally coordinated, but everyone with collections responsibilities is conversant and engaged in the process.

Our focus has been on quantitative assessment of electronic resource and journal use, tempered by the knowledge that different fields have different levels of use. This has been successful and summary reports are used annually by selectors/liaisons in making individual collection decisions.

Our informal communication and workflows are successful at accomplishing needs-based objectives.

Price negotiations with vendors; increasing transparency in use of data for decision-making about collections

Process for assessment for new program reviews gathers good data, although there is no support at the university level for more funding to support areas of need (new journals and databases).

Providing the “net” that captures interdisciplinary materials that might otherwise fall through disciplinary cracks.

Setting and documenting policies for what is selected for the collection

Support of community decision-making

Teamwork, disciplinary analysis and duplicate analysis

The ability to execute change based on the analytics and having the resources and personnel to engage consistently with the data.

The ability to quickly capture electronic usage statistics for quick analysis

The application of learned knowledge to administrative decision-making

The day-to-day work of selectors and technical services colleagues monitoring usage of electronic resources may be the most consistently successful aspect. But the more elaborate projects comparing holdings and collection activity with partner institutions have also been very important and successful in supporting collaborative initiatives. Since this work takes place on so many different levels, it is difficult to isolate parts.

The determinations to add to our collections or not, the determinations to de-accession or store off site, and the prioritization of funding are all informed by our practices.

The efforts made by the Collections Development department to compile and present quantitative data used to inform decision-making.

The high-level assessments can be helpful for large trends. Using Sustainable Collection Services has been helpful for us to look at issues related to storage, which is different than what other libraries use it for (which has more often been for deselection).

The library administration encourages ongoing collection assessment and has made it a priority.

The most successful parts of the collection assessment process are both formal and informal. Informally, listening skills, dispelling myths of assessment, and showing actionable results no matter how small have contributed to the success of collection assessment. Formally, clear support from stakeholders (dean, associate deans, division heads) and productive collaborations have contributed to the success of collection assessment.

The opportunity to examine collections in particular subject or discipline areas is the most successful part of the collection assessment process.

The routine collection of usage statistics for collection evaluation, and the triennial survey of our users.

Understanding the usage patterns of our various constituencies.

Usage analysis

Usage data on e-journals is made available on a regular basis. All subject liaisons have the option to have a personal login to the EBSCONET database to review usage data as needed. Reports from ILS are run and delivered to subject liaisons as requested and in formats easy to use.

Using data to make decisions on which continuing resources should be renewed.

We annually report collections trends showing changes in collections and use over time. We use assessment measures to select items for storage.

We can see the use evolve over time.

We have developed some good tools for presenting and contextualizing data.

57. If you could, what aspects or parts of the collection assessment process would you change? N=39

Better communication

Collection development librarians and acquisitions staff need to develop the skills and, in some cases, the intellectual curiosity requisite for sustained collection analysis.

Communicating value to library staff

Create a more centralized role with a focus on collection assessment. Make collection assessment a systematic, regular, and mandatory process.

Create a more holistic approach.

Develop a proactive rather than largely reactive system of assessment.

Ease in getting data

Ease of extracting and combining data from multiples sources, and at multiple scales

Easier, more uniform data collection, with more consistency from publishers.

Formalize it more and co-locate the data

Fully integrate and capitalize on usage, finance, ROI data into our e-resources renewal, decision-making processes.

Going forward we want to focus more assessment on print collections. We are also going to hire an assessment librarian so that we have a person to help with many kinds of assessments, as currently time to spend on assessment is a challenge.

I would increase personnel support for collection assessment.

I would like to have dedicated staff to run tabulations and to format the data for public and library sharing.

I would make usage data and assessment available as an ongoing service to our liaison librarians.

I would successfully integrate our bibliographers more fully into the assessment process.

Ideally there would be more staff time available for the collection assessment process so that it could be done more systematically.

Improve consistency of data (both internal and external)

It would be easier to gather and combine electronic resource usage data.

More automation and easier access

More funding would be useful.

More people dedicated to collection assessment, better technical infrastructure to manage the process, and improved data quality connected to acquisitions and cataloging processes.

More reliable data

More resources devoted specifically to collection assessment.

More staff/librarian resources, more software, more recognition of the extreme amount of work that goes in to the process of collection assessment

More systematic and centralized

Reporting data

Since the Collection Assessment Librarian is relatively new and first of its kind, processes that existed before the position have changed on their own (i.e., collecting and analyzing usage and pricing data has become centralized; curation and dissemination of what's new and changed has been regularized and centralized). Other processes have not changed much (i.e., heads of libraries spearhead weeding projects with support from the collections team). What is changing is capacity. The more work the

Collection Assessment Librarian accomplishes to educate and train colleagues, the greater capacity everyone in the library will have to do some level of assessment in the subject-area collections of which they are expert.

Statistics collection and assessment/analysis should be handled in the same department.

System improvements and the ability to anticipate what data will be needed.

The difficulty of getting all of the data in one place and making sure that it is shared out to all stakeholders

The time it takes to preform gathering and analysis.

This SPEC survey has revealed the need for much greater documentation of our processes.

We are developing a collections assessment plan that integrates our general collections (print and electronic), special collections, archives, and digital collections. We would like to put in place a regular, systemic review of all continuing resources and standing orders informed by cost and use data.

We need (and are working on) better coordination of a rather distributed set of processes. We also need to understand better, as a library, what the goals of our collection assessment activities are and what outcomes we would like to see.

We need more efficiently organized data (or more staff to work with it) so that we don't seem to be starting from scratch with each project.

We would like a process that is more formal than the one we use. In addition, an ERM would be greatly beneficial.

We'd like to be able to make the data more accessible.

Working with reporting entities such as ARL, ACRL, IPEDS to clarify and simplify.

NO COLLECTION ASSESSMENT PROCESS

58. If an evaluation has not been conducted or there is currently no process for regularly assessing the library collections, please indicate the reason. Check all that apply. N=3

Insufficient staff	2	67%
Lack of time	2	67%
Insufficient technical infrastructure	2	67%
Inadequate funds	1	33%
Inadequate staff skills	1	33%
Lack of perceived value	1	33%
Lack of interest	0	0%
Lack of administrative support	0	0%
Other reason	2	67%

Please briefly describe the other reason. N=2

Need tools and data that support decision-making.

Options often are not cost effective in terms of time and effort, while output/results are often problematic and therefore not useful.

59. What question(s) are you trying to answer about your collection that you have not yet been able to resolve with the tools currently available? N=1

Key challenges are: how well do the collections support the academic enterprise generally and specifically (especially when a unit is undergoing review); what metrics would be useful in achieving equity and establishing spending priorities; how to effectively evaluate alternative strategies and possible actions; devising approaches and standards for monitoring how well the collections deliver value; and crafting the assessment results into compelling and understandable narratives. Moreover, the appropriate methodologies and corresponding metrics vary greatly depending upon the nature and goal(s) of the assessment.

ADDITIONAL COMMENTS

60. Please enter any additional information regarding collection assessment activities at your library that may assist the authors in accurately analyzing the results of this survey. N=12

Collection assessment is a very complex, evolving, multifaceted process involving people with many different and changing roles. It's not always easy to capture that complexity in survey responses.

Collection assessment staff and organization have increased and changed within the past academic year, and new plans and approaches are still being worked out.

Survey responses should have allowed for more than 1 box to be checked, e.g., regular AND project or formal AND informal, to reflect the realities in libraries. Also, as structured the survey does not capture the complexities of collection assessment.

The association dean for collection strategies position has been staffed on a part-time basis for most of the last three years. This arrangement has recently been changed with the incumbent taking on the position full-time, enabling increased resources (greater time and attention) for collection assessment projects and ongoing assessment training and service development.

The survey questions seem to assume an established program for assessment. We do assessment on a very ad hoc basis, which made many of the questions difficult to answer accurately.

This is more a comment on the survey than on assessment activities at our library: It would have been useful to provide a clearer definition of the range of activities that constitute "collection assessment." Every library gathers data on holdings, usage, collection expenditures and analyzes this data in various ways, though not always in an integrated fashion. To what extent—separately and/or in combination—do these activities amount to collection assessment? For example, the question about "changes made as a result of assessment"—our faculty and university administration responded to statistics showing a drop in library for annual collection expenditures. Concern about this development eventually led to greater support for collections funding, but it was unclear to me whether this should be seen (in terms of the present survey) as an impact of collections assessment per se.

We are in the second year of a sustained effort to make collection development more evidence-based. This effort includes programs already in place—such as DDA—and is complementary to a library-wide reorganization of staff that emphasizes the formation of flexible, project-based teams. Our fiscal climate also demands that we be able to present (better) data about our collections and their use both to administrators and to faculty and students. Currently, collection development librarians are considering ways to make assessment part of their regular practices, and we are also examining workflows in acquisitions that could better support the kinds of data we need for reliable assessments.

We do not have a staff position that has sole responsibility for overseeing collection assessment. The Coordinator for Library Assessment is a new position and only 50% of that staff member's job.

Collection assessment happens as subject liaisons see a need and initiate request for data for specific projects. Currently, collection assessment is decentralized in the university library system.

We have had leadership changes at multiple levels within the organization that have disrupted our regular processes and provide an opportunity to put new processes in place.

We hired an Assessment Librarian a couple of years ago, but currently that position is vacant and we haven't replaced them yet, so in this transition period others are taking parts of those duties. I think that having a full-time person dedicated to assessment is a great idea to assist with collection analysis, because along with human resources, this is our largest area of spending and our focus is to meet the needs of our students and faculty. Understanding the usage is key to ensuring we are doing the right things with our budget.

We use both formal and informal collection assessment processes. Basically, the formal processes are led by a committee that focuses on multidisciplinary resources. Informal processes are led by subject librarians for their own assigned collections, but there is collaboration between the committee and the subject librarians.

We've been working hard to modify staff position descriptions to reflect anticipated increases in focus, attention, and skill development to support assessment generally. Collections is one focus at the forefront.

Responding Institutions

University of Alberta
Arizona State University
Boston University
Brigham Young University
University of British Columbia
Brown University
University of Calgary
University of California, Irvine
Case Western Reserve University
University of Colorado at Boulder
Colorado State University
University of Connecticut
Cornell University
Duke University
Emory University
George Washington University
Georgetown University
University of Georgia
University of Houston
University of Illinois at Chicago
Indiana University Bloomington
University of Iowa
Iowa State University
Johns Hopkins University
University of Kansas
Université Laval
Louisiana State University
University of Louisville
McGill University
University of Manitoba
University of Maryland
University of Massachusetts, Amherst
Massachusetts Institute of Technology
University of Miami
University of Michigan
National Library of Medicine
University of Nebraska—Lincoln
University of New Mexico
University of North Carolina at Chapel Hill
North Carolina State University
Northwestern University
University of Notre Dame
Ohio University
Ohio State University
University of Oklahoma
Oklahoma State University
University of Oregon
University of Pennsylvania
Pennsylvania State University
University of Rochester
Rutgers University
Smithsonian Institution
University of South Carolina
University of Southern California
Southern Illinois University Carbondale
University at Albany, SUNY
Syracuse University
Temple University
University of Tennessee
Texas A&M University
Texas Tech University
University of Toronto
Vanderbilt University
University of Virginia
Virginia Tech
University of Washington
Washington University in St. Louis
University of Waterloo
Western University
University of Wisconsin—Madison
Yale University

Representative Documents

Job Descriptions

THE UNIVERSITY OF ROCHESTER LIBRARIES CLASSIFICATION DESCRIPTION

TITLE: Librarian III– Head, Collection Development
DATE: NEW/REVISED: Revised 5/2015 SUPERSEDES: CODE: 1707 GRADE: 00
SUPERVISED BY: Assistant Dean Scholarly Resource Management

Position Summary Statement:

Provides leadership and direction for the overall formulation of a comprehensive collection development and management program for the River Campus Libraries. Works closely with outreach librarians, faculty, Library administration, and University administration to ensure the best use of Library material funds in supporting the teaching and research mission of the University. Is responsible for the River Campus Libraries' $6 million-plus materials budget, and the planning, policies, procedures, and strategies which govern an effective collection development and management operation. An in-depth knowledge of the interdependence of electronic and traditional resources, and the balance between local ownership and external access, is essential for this position. Reports to the Assistant Dean for Scholarly Resource Management.

Typical Duties:

Administration 30%

- Formulates overall collection development and management policies
- Maintains current awareness of University programs and the teaching and research needs of individual academic departments
- Allocates all material funds in consultation with constituency, Library administrators and outreach librarians.
- Establishes guiding principles to achieve the best use and balance of River Campus material funds
- Projects expenditures
- Projects price trends of serials and monographs in all formats
- Determines the data needed to produce the analytical reports for a successful and comprehensive collection development/management program
- Compiles and disseminates analytical reports
- Writes policies and procedures to guide the River Campus collection development/management program
- Serves as outreach librarian, if appropriate

Coordination 30%

- Coordinates and directs outreach librarians' collection development and management activities/responsibilities
- Works with outreach librarians to achieve balances selection/deselection strategies
- Trains new outreach librarians in collection development/management processes
- Works with outreach librarians in planning formal assessments of discrete subject collections
- Participates with the unit supervisor in contributing to outreach librarians performance evaluations by assessing outreach librarians' collection development and management activities
- Collaborates with outreach librarians in collection development activities involving academic departments
- Coordinates large purchases across disciplines
- Plans joint purchases with other institutions and consortia
- Participates with academic departments and outreach librarians in accreditation studies of UR academic departments
-

Coordination with Head of Acquisitions 10%

- Reviews and analyzes periodic fund reports
- Monitors expenditures
- Assures that the materials funds are spent by the end of each fiscal year

- Analyzes the effectiveness of River Campus approval plans
- Negotiates licenses and contracts
- Monitors vendor performance

Coordination with Other Library Units 10%

- Integrates and coordinates collection development-related programs with various Library units and teams
- Coordinates materials work flow with Serials and Monograph Acquisitions, Metadata and Preservation
- Works closely with the appropriate staff in collection development matters which affect the creating of policies and procedures to acquire, provide access, and maintain electronic publications for the River Campus Libraries
- Coordinates collection development activities with the Assistant Dean for Rare Books, Special Collections and Preservation, the Head of Outreach, Learning and Research Services, the Director of the Carlson Science & Engineering Library, Head of the Art and Music Library

Professional Activities 10%

- Follows current developments and improves knowledge in areas of responsibility
- Active in professional organizations
- Contributes to developments in multimedia resources & services
- Represents the River Campus Libraries at national, regional, and local organizations
-

Participation in Library-Wide Activities 10%

- Participates in library-wide planning activities
- Serves on Library-wide and University-wide committees as appropriate
- Participates in library governance with other department heads

Machines and Equipment Used:

Personal computers

Supervision and Direction Received:

Assistant Dean for Scholarly Resource Management

Qualifications:

Required:
Master's Degree in Library Science from ALA-accredited Library School
2 years post-MLS experience in academic library (public service preferred)
Experience working with computer-integrated media resources
Knowledge of current and emerging technologies and the use of multimedia in an academic and research environment
Demonstrated organizational and managerial skills
Proven evidence of strong communication and presentation skills in individual and group situations

Note: This document describes typical duties and responsibilities and is not intended to limit management from assigning other work as required.

RIVER CAMPUS LIBRARIES

UNIVERSITY of ROCHESTER

Outreach Librarian, Biology/Sciences

POSITION TITLE: Outreach Librarian, Biology/Sciences
POSITION CLASSIFICATION: Library Professional II
DEPARTMENT: Carlson Science & Engineering Library
STATUS: Full-time
DATE: May 2015

POSITION SUMMARY:

The Outreach Librarian, Biology/Sciences supports scholarly pursuits of the faculty, staff, and students of the Biological Sciences and other science departments; actively participates in the research, teaching, and learning processes of assigned departments and programs; builds strong relationships with faculty and other campus professionals across the institution; provides face-to-face and virtual reference and consultation services in support of our Q&i service model; engages and collaborates with faculty, students, and staff around current and emerging digital technologies for learning and research; supports a dynamic, student-centered research environment that encourages inquiry, critical thinking, and creativity; develops high quality digital and print collections; develops an understanding of the data needs of science departments and works with the Data Librarian to meet their data management, curation, and visualization needs. The incumbent will have expertise and experience in one or more of the following areas: instructional design and delivery; assessment; scholarly communication and publishing; e-content, including e-books; intellectual property and copyright. The Outreach Librarian, Biology/Sciences reports to the Somerville Director, Carlson Science and Engineering Library.

A. Areas of Responsibility

Support for Research and Scholarship: 35%

- Provides expert research consultation and discovery services in support of learning, teaching, and scholarship.
- Applies subject and disciplinary knowledge to foster relationships with students and faculty.
- Works with faculty, students and library staff to develop projects using scholarly resources, technologies and tools supporting research and scholarship
- Provides guidance on intellectual property and copyright matters

Support for Learning and Teaching: 35%

- Provides information literacy instruction to help students develop as critical and effective users of information
- Creates effective learning objects in support of the curriculum and River Campus Libraries information literacy instruction activities
- Works with faculty to identify and integrate appropriate information resources in the curriculum
- Assists students in identifying appropriate scholarly resources related to course assignments and research

Scholarly Resources Management: 20%

- Collaborates with Scholarly Resources Management staff to develop high quality digital and print collections

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RIVER CAMPUS LIBRARIES

UNIVERSITY of ROCHESTER

- Cultivates a deep understanding of the resource needs of faculty and students; regularly consults with faculty regarding library resources
- Participates in ongoing collection assessment and management activities
- Monitors collection development funds in assigned areas
- Collaborates with the Data Librarian to provide data management support

Miscellaneous Duties: 10%

- Maintains currency with library functions, resources, practices and procedures
- Participates in and contributes towards River Campus Libraries and University committees, meetings, and events
- Maintains professional collaborations with River Campus Libraries colleagues and other campus constituencies
- Contributes to the profession through active participation in conferences, associations, research, writing, etc.
- Performs other duties as assigned

B. Required Qualifications & Competencies

Specific to this position

- Post-graduate degree in the field of library and information science from an A.L.A. accredited institution, or significant expertise supported by substantial library career experience
- A degree or significant coursework in the sciences or biological sciences
- Knowledge of biology and bioinformatics resources
- Expertise and experience in one or more of the following areas: instructional design and delivery; assessment; digital scholarship; scholarly communication and publishing; e-content, including e-books; intellectual property and copyright.
- Prefer a minimum of two years' experience in an academic library environment
- Demonstrated success in working with faculty, students, and library colleagues
- Working knowledge of various assessment measurement systems
- Outstanding verbal, written, and presentation skills
- Self-starter who is comfortable with ambiguity
- Competent with a variety of technologies and devices
- Outstanding interpersonal skills and abilities and comfortable working in a team environment
- Commitment to diversity

River Campus Libraries Requirements:

- Strong commitment to building and nurturing positive relationships among users and colleagues with a proven ability to work in a collaborative environment
- Demonstrated assertiveness and diplomacy
- Proven willingness to pursue additional education and skills development to complement the learning environment reflected in a progressive academic setting
- Demonstrated organizational skills in a broad range of situations
- Collegial and contributory member of the team and of the River Campus Libraries as a whole
- User focused and committed to service excellence with all users
- Solution focused, identifying synergies and opportunities to benefit users
- Professional, organized and prepared

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RIVER CAMPUS LIBRARIES

UNIVERSITY of ROCHESTER

TITLE – Senior Information Analyst (exempt)
FUNCTIONAL TITLE: Integrated Library System Coordinator
SUPERVISOR: Director of the Information Discovery Team
POSITION CODE: 1265 **GRADE**: 54
DEPARTMENT: Information Discovery Team
STATUS: Full-time
DATE: January 2016

POSITION SUMMARY:

Under the general direction of the Director of the Information Discovery Team, and in close collaboration with the members of the Information Discovery Team, the Integrated Library System Coordinator leads the development and maintenance of the Library Management System for the University of Rochester Libraries; provides technical expertise and advanced support in database management, systems analysis, applications development, and system integration for the Library Management System and related technologies that support the discovery of River Campus Libraries resources in support of teaching, learning, and research; and contributes to the development of new resource discovery systems to expose River Campus Libraries digital assets and licensed resources.

SPECIFIC RESPONSIBILITIES:

35% LMS Administration

- Manages governance, policies, and procedures of the Library Management System (currently Voyager) across a multi-campus/multi-library environment; participates in development and implementation of objectives and policies of the River Campus Library; and establishes and manages departmental procedures.
- Provides technical expertise and offers solutions and advice toward achieving optimum workflow efficiencies. Proactively seeks enhancements to Voyager functionality to improve cost effectiveness. Provides or sponsors training and/or awareness for library staff.
- Collaborates with others working in library automation to identify and assess common needs, recommend modifications to existing technologies, share tools and solutions, and keep up-to-date with professional and technical developments. Develops and maintains effective relationships with library automation vendors. Communicates needs and concerns of the Libraries to vendors and interprets the responses for library staff.
- Plans and implements complex software upgrades and new software module installations in collaboration with the Network Services Team, including defining project goals, developing a project plan, specifying tasks and timeline, and implementing the project Network Services Team. Coordinates projects (such as system upgrades and implementation of new features/components) across multiple IT departments, providing technical direction and guidance.

30% Data Management

- Oversees procedures to ensure data integrity. Facilitates extraction, clean-up, and conversion of data from the Voyager system to maximize accessibility of local metadata for use in other applications. Researches, tests, and implements software solutions for batch level record maintenance.
- Develops methods for importing, exporting and manipulating bibliographic and authority data. Coordinates and performs batch loading and batch level maintenance of records.
- Seeks seamless data exchange with campus information systems
- Uses data mining techniques to proactively support library goals and objectives.
- Designs management reports on demand and on an ongoing basis, such as financial reports,

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collection-focused use and cost analysis, ARL Statistics support, and on-demand institutional research support.

25% System Management, Development and Technical Support

- Oversees development, maintenance, and enhancement of the Voyager system, its web interfaces, and related software. Provides program specifications for new applications to serve user needs and business objectives of the Libraries. Designs and verifies all program logic for such applications.
- Provides advanced technical support to enhance and expand service to users and increase productivity of staff; researches, responds to, tracks and analyzes questions and problems from library staff in the use of Voyager and related software; determines and reconciles the causes of computer or program malfunctions, and develops creative solutions for system-related problems.
- Collaborates with Library and University IT organizations to maintain system functionality and integrity, establish and direct system best practices and operating standards, document server operations and procedures, foster interoperability of information systems, and provide technical support to staff and public.
- Collaborates with library personnel to identify, prioritize, and carry out needed Voyager system modifications and improvements. Manages system administration module to customize and manage Voyager system.

10% Professional Development

- Contributes to the organization by participating on committees both internally and externally.
- Participates in relevant professional networks related to library information technology.
- Keeps current with professional and technical developments and participates in relevant professional networks, attends and presents at relevant seminars and conferences.

LEADERSHIP & SUPERVISION:

none

MACHINES AND EQUIPMENT USED ON JOB

HP servers, storage units, and backup devices.

REQUIREMENTS:

Qualifications:

Required: Bachelor's degree in related discipline such as Computer Science or Information Technology; 3-4 years of related experience. Understanding of MARC Standards and relational database structures. Experience with ODBC tools, Perl/CGI or other web application interfaces. Familiarity with the Unix environment, SQL, HTML, XSL, JavaSript, Perl or other Unix scripting language.

Preferred: Master's degree in Computer Science or Information Technology preferred. Experience with library functions and workflows. Experience with library related information standards, eg. EDI, NCIP, SIP2, Z39.50, etc.

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UNIVERSITY OF TENNESSEE LIBRARIES
Collections Evaluation & Assessment Coordinator

University of Tennessee Libraries, Knoxville

Position Title: Collections Evaluation & Assessment Coordinator (Exempt Librarian position)

Position Summary:

The Collections Evaluation & Assessment Coordinator is responsible for designing, implementing and managing a systematic and sustainable collections assessment and evaluation program for the University of Tennessee Libraries. The Coordinator plans, designs, develops and implements library collection evaluation and assessment initiatives in close collaboration and consultation with the Libraries' collection stakeholders including the Head of Research Collections, the Head of Collections Logistics, the Research Collections Librarian for Technical Services, the Electronic Resources Librarian, and the Head of Acquisitions & Continuing Resources. The Coordinator works with Subject Librarians to evaluate and assess collections in their liaison areas, to identify their data needs, and to coordinate information about order requests, academic program review reports, and gift assessments. The Coordinator has prime responsibility for facilitating communication about and understanding of the interrelated initiatives and projects that assure Collections funds are being spent and collection management projects are successfully completed.

Responsibilities

Primary

- Responsible for designing and developing, implementing, and managing an ongoing assessment and evaluation program for the Libraries' print and electronic collections.
- Provides support for, facilitates and/or implements library collection evaluation and assessment initiatives in close collaboration and consultation with the Libraries' collection stakeholders (Head of Research Collections, Head of Collections Logistics, the Research Collections Librarian for Technical Services, the Electronic Resources Librarian, and the Head of Acquisitions & Continuing Resources).
  Examples: a. Coordinates a serials/periodical cancellation project.
  b. Assists the Head of Collections Logistics with a weeding/transfer project by communicating and working with Subject Librarians re. their role in the project.
- Responsible for the compilation and reporting of statistical data and working with the Libraries' Assessment Office for ongoing assessment of the Libraries' collections and collection-related programs.
  Examples: a. Compiles collection usage statistics on a regular basis and make the statistics available to Librarians in a usable format.
  b. Compiles and monitors statistics related to the Libraries' DDA program.
  c. Provides relevant data from sources such as ILS, Alma Circulation, DDA, and vendor-supplied statistics to support collection analysis and development decisions.
- Manages the gift program/process for Research Collections and develops procedures for gift workflows.
  Examples: a. Works with Subject Librarians in reviewing large gift collection.
  b. Negotiates with Cataloging re. the disposition of a gift collection.
- Responsible for the development of the Libraries' report for Academic Program Reviews and Mid-Cycle Reviews.
  Example: Works with a Subject Librarian on their part of the report, assuring their role with the academic department is accurately described.
- Coordinates order requests received by Research Collections.
  Examples: a. Manages the "Suggest a Purchase" program.
  b. Serves as the first point of contact for a Subject Librarian's request for new journal subscriptions and databases; acquires, compiles and communicates the necessary information for evaluation and purchase decisions.
- Identifies and assures the flow of appropriate information from and to Acquisitions & Continuing Resources.
  Example: Manages the distribution of e-mails/communication received related to renewals, price increases, format changes, new resources, vendor/product updates, etc.
- Serves on the Libraries' Research Collections Advisory Group.
- Serves as a key member of the Libraries' assessment network.

- Attends the Subject Librarians' group meetings and Liaison meetings to contribute information related to Research Collections.

Secondary

- Assists with the management of the collections E and R funds.
- Oversees the online representation of the Research Collections Department.
  Examples: a. Maintains the Research Collections Department's webpage.
  b. Organizes the Department's SharePoint files.
- Assists with compiling content for the Department's "Friday Notes" newsletter.
- Assists as needed with special events and projects for which Research Collections is responsible.
  Examples: a. the annual Faculty Bookplate event
  b. the annual Lindsay Young Endowment Nominations

Professional Development

- Professional activities such as attending/presenting at conferences and publishing are supported and encouraged.
- Participating/engaging in continuing education opportunities are expected.
  Example: a 6-weeks online course on "Fundamentals of Collection Assessment," sponsored by ALCTS in 2016

Direct Reports/Supervisory Responsibilities

- This position reports to the Head of Research Collections.
- This position supervises 1 non-exempt employee and 1 Student Library Assistant.

Qualifications (education, experience, job skills)

Required Minimum Qualifications

- MLS degree
- At least 5 years of academic library experience, three of which are related to collection development/management or technical services
- Experience with data analysis, usage statistics, and programs such as Alma Analytics
- Experience with integrated library systems
- Experience with Microsoft Office software (Word, Excel, PowerPoint)
- Experience working with vendors, publishers, and approval plans
- Supervisory experience

Job Skills

- Demonstrated ability to participate in complex projects in a team environment, meet deadlines, and to prioritize work in alignment with the service goals of the University and the Libraries
- Ability to present complex information in an understandable and usable manner
- Strong service orientation and commitment to user service and support
- Excellent interpersonal and communication skills

Associate Director of Collection Development
Collection Development
Yale University Library
Librarian (II-IV)

Schedule: Full-time (37.5 hours per week); Standard Work Week (M-F, 8:30-5:00)

Yale University offers exciting opportunities for achievement and growth in New Haven, Connecticut. Conveniently located between Boston and New York, New Haven is the creative capital of Connecticut with cultural resources that include two major art museums, a critically acclaimed repertory theater, state-of-the-art concert hall, and world-renowned schools of Architecture, Art, Drama, and Music.

The University and the Library
The Yale University Library, as one of the world's leading research libraries, collects, organizes, preserves, and provides access to and services for a rich and unique record of human thought and creativity. It fosters intellectual growth and supports the teaching and research missions of Yale University and scholarly communities worldwide. A distinctive strength is its rich spectrum of resources, including around 12.8 million volumes and information in all media, ranging from ancient papyri to early printed books to electronic databases. The Library is engaging in numerous projects to expand access to its physical and digital collections. Housed in eighteen buildings including the Sterling Memorial Library, the Beinecke Rare Book and Manuscript Library, and the Bass Library, it employs a dynamic and diverse staff of approximately five hundred who offer innovative and flexible services to library readers. For additional information on the Yale University Library, please visit the Library's web site at www.library.yale.edu.

Position Focus
The Yale University Library seeks an innovative librarian with an entrepreneurial ethos and a team-oriented approach to problem solving to fill a key operational position in its collection management structure. Reporting to the Director of Collection Development, the Associate Director of Collection Development will manage funds and provide oversight for collections management procedures as the library works to meet the teaching, research and learning mission of Yale University in a rapidly changing environment. The professional in this position will work with key stakeholders across the Yale University Library system, including subject specialists and staff from access services, technical services and library systems to articulate and implement collection management policies that best utilize library resources in an increasingly digital information environment.

Principal Responsibilities
1. Manage central collection development funds under the direction of the Director of Collection Development, including negotiating deals with vendors, soliciting the counsel of the Collections Steering Committee (CSC) and selectors to inform purchase decisions.
2. Implement a regular reporting structure for use of central funds to ensure transparency and compliance with university fiscal management guidelines.
3. Work with selectors, collection managers, technical services and assessment staff to devise criteria, including statistical metrics, to create a data-driven approach to inform library acquisitions and cancellation decisions.

4. Manage the internal training and education program for staff with collection development responsibilities.
5. Serve as a member of the License Review team.
6. Lead initiatives and special projects as assigned by the Director of Collection Development.
7. Represent, on occasion and as appropriate, the Yale University Library at meetings related to collection-building activities.

Required Education and Experience
Master's degree in Library Science from an American Library Association accredited Library school and two years of related experience. In selected instances, a post-graduate degree in a related discipline may be required or substituted for an MLS. Appointment to this rank is limited to three years at which time it is expected that the individual will develop necessary requirements to meet expectations of performance at the Librarian 3 level.

Required Skills and Abilities

1. Appointment at Librarian 3 requires five years of relevant professional library experience and demonstrated professional accomplishments. Appointment at the Librarian 4 level requires a minimum of eight years of relevant professional library experience and demonstrated professional accomplishments.
2. Demonstrated ability to work with an integrated library management system. Demonstrated ability to manage budgets, correspond and negotiate with vendors and publishers with regard to the acquisition of library materials.
3. Demonstrated ability in collection development methods and knowledge of academic publishing practices and trends.
4. Demonstrated ability to design and manage projects bringing them to a successful conclusion.
5. Excellent analytical skills. Excellent verbal and written communication skills and ability to work collaboratively across organizational units. Excellent quantitative skills and demonstrated proficiency in Excel.

Preferred Education, Experience and Skills
Experience working with Faculty, selecting materials and business/accounting expertise.

Salary and Benefits
We invite you to discover the excitement, diversity, rewards and excellence of a career at Yale University. One of the country's great workplaces, Yale University offers exciting opportunities for meaningful accomplishment and true growth. Our benefits package is among the best anywhere, with a wide variety of insurance choices, liberal paid time off, fantastic family and educational benefits, a variety of retirement benefits, extensive recreational facilities, and much more.

Applications consisting of a cover letter, resume, and the names and contact information of three professional references should be sent by creating an account and applying online at http://www.yale.edu/jobs for immediate consideration - the STARS req ID for this position is 19982BR. Please be sure to reference #19982BR in your cover letter.

Yale University

Library Administrative Services
Administration
Development and Communication
Human Resources
P.O. Box 208240
New Haven, Connecticut 06520-8240

Campus address:
Sterling Memorial Library
130 Wall Street
Telephone: 203 432-1810
Fax: 203 432-1806

Librarian for Assessment
Program Development & Research
Yale University Library
Librarian 1-3

Schedule: Full-time (37.5 hours per week); Standard Work Week (M-F, 8:30-5:00)

Yale University offers exciting opportunities for achievement and growth in New Haven, Connecticut. Conveniently located between Boston and New York, New Haven is the creative capital of Connecticut with cultural resources that include two major art museums, a critically acclaimed repertory theater, state-of-the-art concert hall, and world-renowned schools of Architecture, Art, Drama, and Music.

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Position Focus
The Librarian for Assessment provides leadership and vision for assessment, measurement, planning and analysis throughout the Yale University Library (YUL) and strives to ensure that these activities are integral parts of the Library's programs, services, and collections. The Librarian for Assessment oversees and participates in assessment efforts throughout YUL; serves as an internal consultant for data-gathering and assessment activities conducted by other Library staff; works with Library colleagues to analyze and report assessment data; represents the Library in campus, regional and national assessment efforts; evaluates the effectiveness of Library assessment efforts and how they support the mission and strategic goals of the Library and the University; and recommends ways to strengthen the Library's assessment and measurement programs. The successful applicant for this position must possess strong analytical skills, a firm understanding of Library services and work processes, and strong interpersonal and listening skills. This position reports to the Associate University Librarian for Program Development and Research.

Principal Responsibilities

1. Directs assessment efforts within the Yale University Library. Initiates assessment activities and provides consultation for assessment work done by other Library staff and departments. Promotes awareness and communication of other related assessment efforts within the Library, University, and externally.

2. Works with Library IT and other organizations within the University and external to it to gather and create tools that enable managers and staff to make data-driven decisions.
3. Works with the Director of Collection Development to research, design, and test methodologies for collection assessment appropriate to the needs of the Yale University Library.
4. Analyzes assessment-related data and communicates assessment activities and results to appropriate individuals and groups, including Library staff and the Yale campus community.
5. Develops and maintains expertise in assessment methods, techniques and best practices.
6. Establishes training and documentation programs for Library staff on use of appropriate assessment tools and methods.
7. Evaluates effectiveness of Library assessment activities on a regular basis and makes recommendations on ways to strengthen assessment work, including support needed. Develops and fosters a culture of assessment within the Library.
8. Contributes to the profession and represents the Library and the University in the academic, scholarly, and professional community. Responds to, collaborates with and participates as appropriate in other campus, regional and national assessment-related efforts.

Required Education and Experience
Master's degree in Library Science from an American Library Association accredited Library school. In selected instances, a post-graduate degree in a related discipline may be required or substituted for an MLS. Appointment to this rank is limited to two years at which time it is expected that the individual will develop necessary requirements to meet expectations of performance at the Librarian 2 level.

Required Skills and Abilities
1. Appointment to Librarian 2 requires a minimum of two years of professional library experience and professional accomplishments. Appointment at Library 3 level requires a minimum of five years professional experience and professional accomplishments appropriate to the rank.
2. Proven ability to use various database tools to provide staff with reports and information as requested, including using queries and scripting tools to display reports in web interfaces, with preference given to those with experience in a research library.
3. Proven ability to perform high-level business analytics, to interpret data, and to deliver quality analysis in a fast-paced environment, preferably within a research library environment.
4. Strong customer service orientation; excellent analytical, organizational, management, oral and written communication, and interpersonal skills. Demonstrated ability to work cooperatively with varied groups in a complex organization and to work collaboratively in a rapidly changing team environment.

Salary and Benefits
We invite you to discover the excitement, diversity, rewards and excellence of a career at Yale University. One of the country's great workplaces, Yale University offers exciting opportunities for meaningful accomplishment and true growth. Our benefits package is among the best anywhere, with a wide variety of insurance choices, liberal paid time off, fantastic family and educational benefits, a variety of retirement benefits, extensive recreational facilities, and much more.

Applications consisting of a cover letter, resume, and the names and contact information of three professional references should be sent by creating an account and applying online at http://www.yale.edu/jobs for immediate consideration - the STARS req ID for this position is **20111BR.** Please be sure to reference **#20111BR** in your cover letter.

Policies and Procedures

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Home › About › UConn Library Policies › Collection Development Program, Policies, and Guidelines

Collection Development Program, Policies, and Guidelines

Contents

1. **The Libraries of the University of Connecticut** The libraries of the University of Connecticut develop, maintain, and make discoverable robust and unique collections that support the research and learning needs of the UConn community and beyond. The *University Library* serves all of the undergraduate and graduate programs on the main campus, the four regional campuses, and the UConn Health campus. While the UConn Law Library is administratively separate from the University Library, the *University Library* and the Law Library maintain a strong affiliation, particularly in the areas of collection development and access. With 3.9 million print volumes and well over 110,000 electronic and print journals, the libraries of the University of Connecticut form the most comprehensive public research collection in the state.

7. **Responsibility for Collection Development** The Library's Collections Steering Committee has administrative oversight for the collections. It sets collection development policies, makes broad collection budget allocations, and regularly reviews these allocations for strategic adjustment. Selection/retention decisions for high-cost resources also fall within the purview of the Collections Steering Committee.

   The Library's Research Services unit coordinates the assessment and development of collections and discovery tools of cross-disciplinary nature, while individual subject librarians have responsibility for assessing and developing collections and information sources relating to their assigned academic disciplines. Fund allocations are divided among academic disciplines based on the size of the department, nature of material needed, record of expenditures in relation to previous years, and new initiatives.

8. **General Criteria for Collection Development** The Library works with users and consortia to determine which resources should be acquired or retained and employ the following general criteria when evaluating resources to be added to the general collections:

   1. **Relevance to education and research programs:** Applicability to faculty and graduate students' research interests, current curricular needs, and research trends in academic disciplines.
   2. **Scope and depth of the existing collection:** Breadth and historic retention of the Library's collection in the subject area.
   3. **Quality:** Level of scholarship and creativity; long term relevance of content and format; reputation of the author, publisher, contributors, and editorial board; and availability and importance of illustrations and bibliographies.
   4. **Currency and timeliness**: Rapidity with which new information significantly advances or supersedes earlier scholarship in the subject area.
   5. **Discoverability, usability, and accessibility:** Ability of users to locate materials in scholarly databases and free search engines, intuitiveness of the interface design, and accessibility of online materials for users with disabilities.
   6. **Cost:** Expense of acquiring, processing, cataloging, shelving, and preserving materials, both commercially sold and free.
   7. **Language and country of origin:** Optimal language and perspective for specific programmatic research and education needs.
   8. **Contribution to open scholarly communication:** The product positively impacts open access to research and scholarship; the information is or will soon become readily accessible to the world community.

11. **Deselection** To maintain a vibrant and relevant collection, the Library employs deselection, also known as collection weeding. Periodic evaluation of the relevance of resources is an essential element of collection development that ensures the Library's materials remain useful and accessible. The following criteria are used when evaluating items for deselection in the general collections:

   - Research, teaching, and learning value
   - Retention commitments in shared stewardship initiatives
   - Physical condition
   - Discoverability and usability
   - Circulation rate
   - Currency of information
   - Relevance to curriculum
   - Availability of newer editions
   - Duplication
   - Increase in cost

UNIVERSITY OF CONNECTICUT LIBRARIES

Overview of the UConn Libraries' Collections Review

http://lib.uconn.edu/find/collections/uconn-libraries-collections-review/

UCONN | UNIVERSITY OF CONNECTICUT

A-Z

UConn Libraries

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Search...

Home › Find › Collections › Overview of the UConn Library's Collections Review

Overview of the UConn Library's Collections Review

We have always been committed to carefully developing and stewarding collections that support the research and learning needs of the UConn community. Drawing on metrics that are both qualitative (e.g., feedback from faculty and students) and quantitative (e.g., cost and usage data), we maintain collections that align with the research and learning needs of our community while also maximizing the value-on-investment for the Library's expenditures.

In order to continue to uphold our stewardship commitments, we are currently performing an extensive review of collections and collections-related services. The goal of the review is to evaluate collections and collections-related services in an environment characterized by scarcities in funding and ongoing increases in subscription costs. These cost increases are particularly significant for the Library's journal subscriptions, which generally exhibit inflation rates of approximately 5% each year. Many of these subscriptions are bundled in large publisher-specific packages that limit our flexibility in managing collections in ways that reflect our stewardship values.

In close consultation with faculty, students, and other members of the UConn community, we are carrying out the collections review in two phases. Phase One consisted of an Initial Collections Review that occurred during the summer and early fall of 2015. This review was designed to quickly address a projected shortfall of approximately $300,000 in the FY2016 collections budget. Phase Two of the review consists of a Comprehensive Collections Review. This phase aims to ensure that the Library is maintaining collections and collections-related services that align with the needs of the UConn community while reflecting our commitments to stewardship in an environment of scarce funding.

Both phases of the Library's collections review have been designed to be data-informed, combining qualitative metrics with quantitative data such as cost, usage, cost-per-use, and alternate coverage and access options (e.g., aggregate databases and interlibrary loan fulfillment cost). See our Factors to Consider page for additional details on the principles and metrics that inform the review.

The review will be further guided by our understanding and promotion of the evolving ecosystems through which knowledge is created, shared, discovered, and accessed. These evolutions include Open Access models of scholarship and the adoption of Open Educational Resources to enable student learning. We are also actively engaged in efforts to reduce collection costs by negotiating reduced renewal prices with publishers and vendors and by continuing our efforts to maximize the value of consortial sharing agreements.

As we carry out the review, we will update our collections review webpages while also actively consulting and sharing information with the UConn community. If you have questions or concerns, please Contact Us.

Collections Review Timeline

Collections Contacts

Collections Review: Frequently Asked Questions

Phase One: Initial Collections Review

Phase Two: Comprehensive Collections Review

Collections Review: Factors to Consider

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Collections Review Timeline

http://lib.uconn.edu/find/collections/uconn-libraries-collections-review/collections-review-timeline/

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- Leisure Reading
- Microform
- Billie Levy Children's Book Interviews
- Connecticut Artists Project
- Public Records of the Colony of Connecticut, 1636-1776
- Government Documents
- Theses and Dissertations
- Latin American Newspapers Database

Collections Review Timeline

The anticipated timeline for the Library's collections review is as follows:

July 2015	Phase one (Initial Collections Review) of the review process begins. The Library begins gathering and formatting data for Phase two (Comprehensive Collections Review) of the review process.
October 2015	The Initial Collections Review concludes and outcomes are shared with the UConn community.
October – December 2015	In consultation with the Provost's Library Advisory Committee, the Library plans for the Comprehensive Collections Review.
January 2016 – present	The Library conducts the Comprehensive Collections Review.

As the Library progresses through the review processes, it is possible that the anticipated timeline will need to be revised. As such revisions occur, this page will be updated accordingly.

If you have questions or concerns, please Contact Us.

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Phase Two: Comprehensive Collections Review

http://lib.uconn.edu/find/collections/uconn-libraries-collections-review/phase-two-comprehensive-collections-review/

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Phase Two: Comprehensive Collections Review

We are conducting a comprehensive review to ensure that the Library maintains collections and collections-related services that align with the research and learning needs of the UConn community while reflecting our commitments to stewardship in an environment of scarce funding. This review will be comprehensive in scope and holistic in its awareness of the relationships between the Library's collections and services and their impacts on faculty and students. This page describes the processes that we plan to follow during the comprehensive review. For a more condensed summary of the full collections review process, see the Timeline.

- **Compile and Format Data on Subscribed Resources – July through December 2015**
  The comprehensive review process began in the summer of 2015 when the Library started compiling and formatting detailed lists of subscribed journals, journal packages, and databases. The lists include data on subscribed resources' costs, usage, cost-per-use, and alternate access options.
- **Consult with the Provost's Library Advisory Committee – October through December 2015**
  Consisting of faculty from over fifteen academic departments along with graduate and undergraduate student representatives, the Provost's Library Advisory Committee is a formal means through which the UConn community can advise on library-related issues. At two meetings during the 2015 fall semester, the committee reviewed and provided input on how the Libraries should carry out a comprehensive review of collections. This input informed how the Library designed the review processes initiated during the 2016 spring semester.
- **The Library Conducts the Comprehensive Collections Review – January 2016 to present**
  The Library's collection managers, including subject specialists, draw on our Factors to Consider in order to conduct a comprehensive review of both subscribed and monographic resources.

If you have questions or concerns, please Contact Us.

UNIVERSITY OF CONNECTICUT LIBRARIES

Collections Review: Factors to Consider

http://lib.uconn.edu/find/collections/uconn-libraries-collections-review/collections-review-factors-to-consider/

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Collections Review: Factors to Consider

Guided by the Library's Purposeful Path Forward, the collections review is rooted in the following principles:

- Developing and sustaining access to robust and unique collections that support research and learning.
- Collaborating with the UConn community to make the best decisions.
- Acquiring collections through sustainable models and unexploitative pricing that enable the Library to maintain flexibility in collection management decisions.
- Maintaining collections that reflect an appropriate balance between disciplines and the needs of varying stakeholders in the UConn community.
- Remaining flexible enough to respond to new areas of focus in research and learning.
- Supporting a reasonable balance between commitments to monographs and subscribed resources.

To achieve these principles, the collections review is based on metrics for analysis that are both quantitative and qualitative. The quantitative metrics for analysis include:

- Acquisition cost: This is the amount (either an annual or one-time fee) that the Library pays for a resource. Year-to-year differences in cost will also be considered.
- Usage data: For journals and other resources that provide full-text article access, usage data consists primarily of monthly counts of article downloads. For other resources, usage data may include sessions, searches, views, chapter downloads, or other forms of usage. For more information on the usage data generally available for library resources, see the COUNTER Code of Practice.
- Cost-per-use data: This is a calculation of value in which a subscription cost is divided by the total usage that occurred during the subscription term.
- Publication and citation data: For some resources, we are able to identify the number of times they have been published in and cited by UConn researchers.
- Alternative access: In some instances, a resource within the Library's collection may be available through an alternative means. For example, portions of a subscribed journal may be freely accessible online or available (sometimes following an embargo period) through a database that the Library subscribes to.
- Projected cost for interlibrary loan/document delivery: The Library's Document Delivery & Interlibrary Loan service helps the UConn community to obtain materials not held in the Library's collections. Based on usage data, we can often make a rough approximation of the annual cost to obtain articles from a journal via interlibrary loan/document delivery and then compare that cost against the journal's subscription cost.
- Holdings comparisons: The Library will use tools such as the GreenGlass group functionality to carrying out an analysis of monographic collections. This analysis will include in-depth comparisons with the monographic collections held by certain peer institutions.

These quantitative metrics provide a starting point for understanding the value of the Library's collections. Beyond these quantitative metrics, it is essential to fully analyze the value of collections using qualitative metrics. The qualitative metrics for analysis include:

- Descriptions and rankings from faculty and students regarding the value of resources in support of their ability to conduct research, teach, and learn.
- Overlap in subject focus and functionality with other resources.
- Changes in UConn's research areas, programs, and courses.

If you have questions or concerns, please Contact Us.

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Collection Management

http://www.lib.uiowa.edu/collections/

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Collection Management

The University Libraries divides responsibility for building the Libraries' collections among a number of librarians, each of whom is responsible for selecting library materials on one or more subject areas. It is the function of these collection management librarians to determine which books, periodicals, videotapes, computer files, and other information sources should be acquired by the Libraries. These decisions are made in each case on the basis of the collection management librarians' knowledge of current curriculum needs, faculty research interests, research trends in the relevant subject areas, and the strengths and weaknesses of the collections already in place. Communication between the collection management librarians and faculty is essential for the librarians to have the information necessary for their decisions.

In selecting information resources, the Libraries fully subscribes to the Library Bill of Rights issued by the American Library Association. Among other rights, this statement affirms that no materials should be excluded because of the origin, background, or views of its creators, that materials selected should reflect all points of view on current and historical issues, and that censorship should be challenged.

- Collection Management Librarians (alphabetical list by subject area)
- Collection Management Team
- Current Resources Under Evaluation (Trials)
- E-book Value Statement
- Information for Donors of Gifts-in-kind
- Scholarly Publishing Guide
- Recommend a library purchase
- Selection of Library Materials Policy
- University of Iowa Libraries Open Access Statement | Opting out of the policy (Authentication required) *(access for UI Libraries' staff only)*
- Iowa Framework for Liaisons/Subject Librarians (.pdf)

Special Projects

- CIC Shared Print Repository
- JSTOR Print Journal Assessment Project
- Timeline for Print Journal Storage Project

Contact the Libraries
Library Locations & Hours
News & Events
Help Using the Libraries
Assistance for Patrons with Disabilities
Suggestions?
Staff SharePoint (Authentication required)

Make a Gift

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100 Main Library (LIB)
125 West Washington St.
Iowa City, IA 52242-1420
319-335-5299 (Service Desk)
319-335-5867 (Administration)

Selection of Library Materials and Information Resources

The academic mission of the University of Iowa is "to advance scholarly and creative endeavor through leading-edge research and artistic production; to use this research and creativity to enhance undergraduate, graduate, and professional education, health care, and other services provided to the people of Iowa, the nation, and the world; and to educate students for success and personal fulfillment in a diverse world." One measure of the University of Iowa Libraries' strategic support of the University's academic mission is providing access to inclusive, diverse, and distinctive collections and preserving them for future scholars. The collections of the University of Iowa Libraries are a result of close collaboration and commitment by librarians, faculty, and students to build excellent library collections to support diverse undergraduate, graduate, professional and post-doctorate academic programs.

The University of Iowa Libraries divides responsibility for building the Libraries' collections among a number of librarians, each of whom is responsible for selecting library resources on one or more subject areas. It is the function of these collection management librarians to determine which books, journals, video and sound recordings, electronic resources, and other information sources should be acquired or made available by the Libraries. Selection decisions that fall under the purview of collection management librarians include decisions to:

- purchase a resource
- subscribe to a journal or database
- choose among or change formats of library resources
- accept or decline a gift in kind
- request that an online resource be cataloged or otherwise made accessible through the Libraries' web site
- withdraw materials from the collection
- cancel subscriptions
- assess materials suitable for offsite storage

These decisions are made in each case on the basis of the selector's knowledge of current curriculum needs, faculty research interests, research trends in the relevant subject areas, and the strengths and weaknesses of the collections already in place. Needless to say, communication between the selectors and the Libraries' users is essential, if the selectors are to have the information necessary for their decisions.

The general criteria used by selectors for the acquisition of information resources at the University of Iowa Libraries are listed below:

- curriculum support
- cost (ongoing or one-time)
- standard source availability (i.e., standard or "core" materials on subjects studied at the University)
- faculty research support
- graduate student research support
- subject representation (i.e., representative materials on major trends in scholarship)
- collection continuity (i.e., maintenance of strong existing collections)
- inter-institutional agreements (i.e., agreements with other academic libraries to take responsibility for collecting on particular subject areas)

To maximize limited funding, most resources will not be made available in more than one format; in general, electronic versions are preferred for journals, so long as they have reliable and perpetual access rights and meet accessibility requirements.

In selecting and making available information resources, the Libraries will comply with the copyright law and with the provisions of any licenses that are signed on behalf of the University. The Libraries will take reasonable measures to promote copyright and license compliance among its users. The selection of a resource that requires the University to agree to a license is contingent on the acceptability of the license provisions. Within the University Libraries, the acceptability of a license is determined by the Associate University Librarian with responsibilities for collections and scholarly communication or that person's designee; ultimately, approval of licenses falls under the jurisdiction of the University of Iowa Purchasing Department.

In selecting and deselecting resources, the Libraries fully subscribes to the Library Bill of Rights, issued by the American Library Association. Among other rights, this statement affirms that no materials shall be excluded because of the origin, background or view on current and historical issues, and that censorship should be challenged.

December 10, 1991

revised January 2003; January 2008; March 2016

The University of Iowa Libraries

Iowa Framework for Liaisons/Subject Librarians

Prefatory comments

EXCO has approved the attached framework as a guide and toolkit for librarians who serve as liaisons to academic departments, colleges and programs to take effect for the 2010 evaluation year. Liaisons, whether for collection management, reference/instruction or both, and those who supervise them (chiefly Linda Walton, Kathy Magarrell and Ed Shreeves) should use the framework as a guide in identifying priorities and specifying activities for 2010 workplans. We should emphasize that we do not expect each liaison to show accomplishments annually in each of the more than 30 items listed in this framework. You and your supervisor as always should agree on priorities based on both your individual and departmental goals <u>and</u> the strategic goals of the library as a whole, while keeping in mind that this document articulates a range of activities seen as appropriate to a liaison.

We also recognize that liaison responsibilities for some subjects are divided between two and occasionally more people. In an ideal world we would like to see the duties combined in one person and hope to move in that direction as much as possible, but our current organization and staffing levels make this impossible at present. It is therefore important for those sharing liaison duties to communicate with one another to ensure that all aspects of the job are covered. Some, such as the tasks enumerated under scholarly communication, might be shared, while in other cases the responsibility could fall entirely to one person. Effective communication is therefore vital.

This document also articulates for the first time some new expectations for liaisons, particularly in the section on scholarly communication. During this season's annual review and revision of job descriptions, liaisons should revise their own job descriptions with the expectations outlined in this document in mind. The framework is not intended for use during the evaluation process for 2008-2009.

4. Conduct needs assessment as appropriate and selectively measure instructional outcomes in order to ensure effectiveness of instructional initiatives.
5. Develop and manage physical and/or online learning spaces.
6. Identify areas where new online learning and digital tools can place the Libraries into the flow of teaching, learning and research, with particular emphasis on ICON, the University's course management system
7. Actively participate in the development, coordination and integration of online tools in support of teaching, learning and research.

Collection Development and Management

1. Build and manage library collections in assigned subject areas:
    - Systematically selecting material in all formats (print, manuscripts, digital, data sets, fixed and streaming multimedia), to serve the current and future research, teaching, and learning needs of University of Iowa clientele.
    - Building on collections of distinction that may also serve regional, national and international users.
    - Managing collection funds efficiently, effectively and in a timely manner.
2. Strategically assess and make decisions regarding the acquisition, retention and preservation of collections.
3. Discover and recruit institutional scholarly output, research data and other content for inclusion in the University Libraries' digital collections.
4. As opportunities arise, develop and maintain relationships with dealers and donors (of both in-kind and monetary gifts.
5. Work proactively with IT, technical and access services staff on appropriate arrangement, description, cataloging and provision of access to traditional collections and electronic resources, such as *LibGuides.*

Scholarly Communication

1. Educate and inform faculty, graduate students, and campus administrators about scholarly communication issues. Examples include:
    - Helping faculty and graduate students to understand their rights as authors
    - Contributing content to copyright and/or scholarly communication web sites
    - Make faculty and graduate students aware of alternative publication models in their discipline.
    - Advocate for sustainable models of scholarly communication.
    - Assist in the development and creation of tools and services to facilitate scholarly communication.
2. Institutional Repository (IROnline) and Digital Initiatives. Examples include:
    - Help administrators, faculty, and students understand the role of the institutional repository in building and preserving digital collections
    - Work with faculty and departments to promote the institutional repository as a scholarly communication tool

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JSTOR Print Journal Assessment Project

http://www.lib.uiowa.edu/collections/jstor/

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JSTOR Print Journal Assessment Project

To: Faculty

From: John Culshaw and Carmelita Pickett

Date: January 21, 2015

RE: New Offsite Storage Facility Planning and JSTOR Assessment

UI Libraries continues to participate in the CIC Shared Print Repository (SPR) to mitigate our current space crisis. Shared print repository agreements allows UI Libraries and our peer institutions to responsibly withdraw large journal sets and preserve print copies at a regional repository.

The Libraries is currently in the process of planning for a new offsite storage facility. This planning will require the Libraries to consider withdrawing print collections that are replicated in our digital collections. We have determined that withdrawing JSTOR journal publications from our current offsite storage facility as a next step for managing this process. This planning also presents an opportunity to leverage existing relationships with consortium actively engaged in print preservation such as the Center for Research Libraries (CRL).

CRL is an international consortium of university, college, and independent research libraries. CRL has assembled the JSTOR Print Archive which includes over 87,081 volumes. Since UI Libraries is a member of CRL, this archive is accessible to our University community. We will assess our JSTOR holdings at the offsite storage facility against the CRL JSTOR Print Archive. We are now beginning a review of nearly 391 journal titles accessible in JSTOR. Withdrawing these titles now will help us effectively manage our long-term storage needs and mitigate the cost of relocating these titles to the new facility.

Our collection guidelines for withdrawing print journal titles will remain the same. We will withdraw print volumes for which we own content in perpetuity. We will rely on the electronic copies with the security of having the print volumes at CRL. Some journals will be retained, as the print version is still used. We will also use this as an opportunity to explore contributing to the CRL JSTOR Archive. In the future we will withdraw other JSTOR titles held across the Libraries. We will rely on our subject specialist librarians to communicate with you about journals and other collections that are candidates for CRL JSTOR Print Archive.

Additional information, including lists of JSTOR candidate titles, is available here:

List of Print Journal Titles to be Withdrawn

Journal Withdraw Project Timeline

We plan to start withdrawing selected JSTOR titles late February.

Who to contact with questions: Karen Fischer, 319-335-8781, karen-fischer@uiowa.edu

University of Manitoba
Libraries

Policy: 305 **Page** 305.1

Subject:	COLLECTION EVALUATION FOR PROGRAMME AND COURSE CHANGES, ACADEMIC PROGRAMME REVIEWS, AND RESEARCH CHAIRS		
Approved by:	Director of Libraries		
Contact:	Coordinator, Collections Management	**Approved:**	February 1991
Prepared by:	Jan Horner Janneka Guise Judy Harper	**Revised:**	December 19, 2002 September 21, 2006 September 11, 2009

POLICY STATEMENT

When academic departments add or modify courses or programmes, or undergo programme reviews, the departments should notify the Libraries. The liaison librarian for the relevant subject(s) is responsible for preparing a statement of library support, indicating whether the Libraries' collection can (or cannot) support the course or programme. Liaison librarians are expected to develop and maintain a thorough familiarity with their collections, and therefore the amount of collection analysis required will vary, depending on length of time spent as liaison librarian for that subject. This Policy contains procedures and guidelines to help the liaison librarian in this task.

After preparing the statement, the liaison librarian will give it to the Unit Head for review. The liaison librarian will then send the statement to the Coordinator, Collections Management, who will review it and contact the liaison librarian if there are any questions. The statement will then be forwarded to the Director of Libraries for review. Both the Director and the Coordinator, Collections Management, will sign the statement. In the case of Academic Programme Reviews the statement is signed by the liaison librarian(s) who prepared the statement and the Head of the relevant Unit library as well.

A copy will be made for the Collections Management files and the original document with the signed form will be returned to the liaison librarian, who will then provide it to the appropriate faculty member. The liaison librarian should make a copy for the Unit Head.

PROCEDURES

A statement is NOT required for

- re-numbering of a course
- addition of restrictions to a course
- listing of courses which are not currently offered
- changes in pre-requisites
- combining or splitting of courses
- a change in the title of a course (where the content remains unchanged)

In these cases, the liaison librarian will supply the department or faculty with the Minor Change Form (see Attachment 1), and send a copy to the Coordinator, Collections Management and the Unit Head.

A statement IS required for

Courses

- Individual courses (undergraduate or graduate, new, revised, or reactivated)
- "Topics" course being introduced as a separate new numbered course
- Certificate programmes, Faculty of Extended Education

In these cases, the liaison librarian will supply the department or faculty with the Library Statement Form (see Attachment 2).

- If the liaison librarian believes the Libraries' collections can support the proposed course, no further documentation shall be appended to the Library Statement Form (the liaison librarian may wish to keep documentation in a personal file in the library for future reference).
- If the liaison librarian believes the Libraries' collections cannot support the proposed course, append supporting documentation (see below) to the Library Statement Form.

New & Revised Undergraduate/Graduate Programmes

In these cases, the liaison librarian will supply the Library Statement Form (see Attachment 2).

- If the liaison librarian believes the Libraries' collections can support the proposed programme, do not append supporting documentation (the liaison librarian may wish to keep documentation in a personal file in the library for future reference).
- If he/she believes the Libraries' collections cannot support the proposed programme, append supporting documentation (see below) to the Library Statement Form.

Undergraduate/Graduate Programme Review

In these cases, the liaison librarian will supply the appropriate template (see Attachment 2) as described below.

The Periodic Review of Academic Programmes instituted by the Faculty of Graduate Studies in 2001, and then for Undergraduate Programmes in 2005 involves a review of the Libraries' ability to continue to support graduate and undergraduate programmes in each departmental subject area at the University of Manitoba [see University Policy 429]. The Libraries' response, although similar to other reports as described above, must follow more specific guidelines delineated in the Template for UML Responses to Graduate Programme Reviews (Attachment 3) and the Template for UML Responses to Undergraduate Programme Reviews (Attachment 4). It should be noted that any programme for which the Libraries already prepares a report for accreditation purposes will not be subject to an Academic Review.

Canada Research Chairs

To be completed if an assessment is requested by the Canada Research Chair. Liaison librarians are encouraged to contact Canada Research Chairs in their subject areas when appointed, to determine if they have any library needs.

GUIDELINES

1. Forms & Signatures – The liaison librarian will use one of two forms, depending on the type of evaluation being done. Both are available on the Collections Management Web page http://www.umanitoba.ca/libraries/units/collections/
   a. Minor Change Form (Attachment 1): use when a statement is not required. No signatures are necessary.
   b. Library Statement Form (Attachment 2): use when a statement is required for courses, new and revised programmes, and Canada Research Chairs. Note: the Undergraduate and Graduate Programme Review templates have a Library Statement Form incorporated into them.

   Signatures required: For courses, new and revised programmes & Canada Research Chairs (2), for Undergraduate and Graduate Programme Reviews (4).
2. Sufficient Time - Departments are required to give *one month's notice* for library statements regarding course changes and *six month's notice* for new programme proposals. Collections Management will help the liaison librarian complete the statement in time.
3. Documentation - Requests from faculty for evaluations should include forms (see Attachments 5 and 6) and course outlines.
4. Brevity – Keep statements and supporting documentation brief and to the point.
5. Vigilance – Be vigilant concerning course/programme changes in your area of responsibility.

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SUPPORTING DOCUMENTATION

Where additional explanation or analysis is required, supporting materials may be appended to the Library Statement Form and may include:

Introduction – The first paragraph should be a strong introduction and should clearly state whether the Libraries have or do not have sufficient resources to support the proposed course. Clearly indicate the funding required to bring the collection up to an adequate level. If sources of funding exist, they should be named, whether budget or gift funds.

Collection Measures – Some methods of gauging a collection's appropriateness may include: volume counts (comparison with peer institutions), bibliographic checking, database searches, and journal lists. Collections Management staff will assist with this work given sufficient time.

Analysis – The statement should provide a report on the measures selected. Results of checking lists should be interpreted using the "UML standards for list checking" (Appendix 5 in the UML Collection Assessment Guidelines, 1999 http://www.umanitoba.ca/libraries/units/collections/assessment_guidelines.html#Appendix%205 ; see Attachment 7). Where appropriate, results should be separated by format: monographs, serials, maps, audio-visual, etc. Consider what might these results reveal about the age or language of the collection; the importance of serials versus books to the discipline; and the need for multiple copies or various editions.

Other Factors – Where appropriate, comment on the anticipated course enrollment, the proximity of library resources to primary users and/or the accessibility (hours of operation, etc.), whether the course is offered online, whether interdisciplinary subjects are involved.

RESPONSIBILITIES

Responsibility of the Liaison Librarian

a. Submits to an academic department, upon request, an assessment of the UM Libraries' ability to support the resource needs of a proposed new or revised course/programme. Submits upon request, an assessment of the Libraries' ongoing ability to support academic programmes.

b. Notifies the department immediately if not enough time has been allowed to properly assess the resource needs of the proposed course/programme.

c. Indicates to the department when the assessment can be finished.

d. Consults with the department to discuss the proposal, to identify any special needs for the course or programme, and to agree, if needed, upon a bibliography to use in assessing library support.

e. In cases where the Libraries collections cannot support the proposal:

305.4

- seeks cooperation with appropriate librarian(s) in assessing resources held and needed for cross- or interdisciplinary courses/programmes;
- seeks advice from Unit Head and/or Coordinator of Collections Management on any particular problems associated with the assessment;
- submits a draft of the assessment statement to the Unit Head.

f. Completes the assessment within the time period indicated, recognizing that a short period of time is necessary for review by the Coordinator, Collections Management and the Director of Libraries. If there appears to be a problem with completing the assessment within the time period, contacts the Coordinator, Collections Management for advice and assistance.

g. Submits the assessment to the Collections Management Coordinator including a statement, if necessary, of the funds needed to improve the Libraries' support for a new course or programme.

h. Upon request of a department/faculty/school, meets with outside reviewer(s) of a proposed new programme or programme review.

i. When the Extended Education Division proposes a course or certificate programme with the intention of having students use the resources of a library outside the University of Manitoba Libraries, obtains written confirmation from the Library Head that the library concerned has the necessary resources and is willing to make them available to University of Manitoba students.

Responsibility of the Unit Head

a. Acts as resource person for liaison librarians when applicable.

b. Confers with Coordinator, Collections Management on any particular problems associated with curriculum change or with proposal assessment.

c. Relays information on curriculum change from the Coordinator, Collections Management to the appropriate staff.

d. Acts in the capacity of liaison librarian when applicable.

e. Reviews statements prepared by liaison librarians in the unit for the Undergraduate Programme Review and Graduate Programme Review, and signs them. Reviews statements prepared by liaison librarians in the unit for curriculum change.

f. Upon request of a department/faculty/school, meets with outside reviewer(s) of a proposed new programme or programme review.

Responsibility of the Coordinator, Collections Management

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a. Regularly attends meetings of the Senate Course Changes and Curriculum Committee. Relays information from these meetings as well as information from the Director of Libraries regarding the Faculty of Graduate Studies' Program and Planning Committee meetings to the appropriate Unit Heads.

b. Informs Unit Heads in the event that a new programme approved by one of these committees is subsequently rejected at a higher level.

c. Serves as a resource person to Unit Heads in all aspects of assessment for new courses/programmes including those at a graduate level.

d. When requested, coordinates joint efforts between library units in assessing resource needs for cross- or interdisciplinary courses/programmes.

e. Upon request of a department/faculty/school, meets with outside reviewer(s) of a proposed new programme. Invites appropriate Unit Heads and liaison librarians to attend meeting.

Responsibility of the L.A. IV, Collections Management

a. Schedules the work related to the Graduate and Undergraduate Programme Reviews.

b. Gathers guidelines and information, and generates data for the liaison librarians preparing the Graduate and Undergraduate Programme Reviews.

c. Checks bibliographies or lists, compiles tables, and helps the liaison librarian prepare the final version of the report for the Graduate Programme Reviews.

d. Ensures that all the signatures are added to the Library Statement Form for the Graduate and Undergraduate Programme Reviews, and that the report is delivered to the appropriate liaison librarian on time.

Responsibility of the Director of Libraries

a. Regularly attends meetings of the Faculty of Graduate Studies' Program and Planning Committee. Relays information from these meetings to the Collections Management Coordinator.

Attachment 1 - Minor Change Form
Attachment 2 – Library Statement Form
Attachment 3 - Template for UML Responses to Graduate Programme Reviews
Attachment 4 - Template for UML Responses to Undergraduate Programme Reviews
Attachment 5 - Undergraduate course form (supplied by faculty)
Attachment 6 - Graduate course form (supplied by faculty)
Attachment 7 - UML Standards for List Checking

305.6

Attachment 5

UNIVERSITY OF MANITOBA

PROPOSAL FOR THE INTRODUCTION, MODIFICATION OR REACTIVATION OF UNDERGRADUATE COURSES

Faculty/School: Click arrow to select **Department:** Click arrow to select

This course is to be: Introduced ☐ Modified ☐ Reactivated ☐

Previous Course No. ______ (for modified, or reactivated courses)

Proposed Course No. ______ (for introduced course)

Course Level: 1000 ☐ 2000 ☐ 3000 ☐ 4000 ☐ 5000 ☐

Course Subject: ______ Is this a new subject area? Yes ☐ No ☐

Credit Hours ______ Grading Mode: Letter Grades ☐ Pass/Fail ☐

Long Title: ______ (Limit of 90 characters)

Short Title: ______ (Limit of 25 characters)

Effective Term: Click to select Fall/Winter ☐ Summer 1/Summer 2 ☐

Language of Instruction: English ☐ French ☐

Course Description (Current): (For modified or reactivated course)

Course Description (Proposed): [as it will appear in the calendar]

Is a laboratory required? Yes ☐ No ☐

Reason for Change:

If this change leads to changes in programs in your own unit, or in other faculties, provide supporting documentation as noted in the Guidelines.

Signatures:

Department Approval: ______
Print Name Signature Date

Faculty/School Approval: ______
Print Name Signature Date

Page 1

Courses that may not be held for credit with this course:

NOTE: Please include all applicable previous course numbers below. **[Must also be included in calendar course description]**

Prerequisites:

Pre- or Corequisites: (Prerequisites that may be taken concurrently)

Corequisites: (Courses that must be taken concurrently)

Other Information: [To be used by the Office of the University Secretary only.]

Will this course be available to students in other faculties/school? Yes ☐ No ☐

Please indicate which, if any, of the following attributes should apply to this course:

Canadian Studies ☐ Women's Studies ☐ University 1 course ☐ Option in Aging Course ☐

Is this course intended to satisfy : Written English Requirement ☐ Mathematics Requirement ☐

NOTE: If there are other course attributes that should be applied, please contact the Registrar after the course has been approved. Supporting documentation must be included.

TO BE COMPLETED FOR ALL COURSES INTRODUCED OR MODIFIED AS APPROPRIATE
(See Guidelines)

The following items are attached to and form part of this proposal:

☐ Course outline

Format: list lecture, laboratory and tutorial hours per week; provide an outline of topics covered in lectures; and include a brief description of laboratories, tutorials and assignments. Identify required textbook(s) if applicable. *Note: No more than one page in length.*

☐ Statement from subject librarian(s) as to library resources

Note: The library must be provided with a course outline as described above. As well, the proposing unit and the subject librarian should discuss and agree upon the bibliography to be used in assessing the strength of the library's collection in the field. The library will need at least one month notice of course proposals, and six months notice of program proposals, in order to prepare its statement.

☐ Statement of additional costs, workload, and/or supplies

☐ Statement(s) from other Departments, Faculties or Schools of possible overlap

☐ Statement(s) from other Departments, Faculties or Schools on possible changes in their programs

☐ Revised Program Descriptions for all programs using this course

☐ Additional documentation

Page 2

Attachment 6

FACULTY OF graduate studies
UNIVERSITY OF MANITOBA

PROPOSAL FOR COURSE INTRODUCTIONS

UNIT NAME	PREPARED BY	Date Approved by unit Faculty Council

COURSE TO BE INTRODUCED

PROPOSED COURSE NUMBER	COURSE TITLE	CREDIT HOURS

ABBREVIATED COURSE TITLE **(Maximum 15 characters)**

GRADING MODE Letter Grades ☐ Pass / Fail ☐

PROPOSED NEW CALENDAR DESCRIPTION
(Including any pre- or co- requisties. **Must not exceed 4 lines, 75 characters per line)**

STATE REASONS FOR THE INTRODUCTION OF THE NEW COURSE

course_introduction.docx cvtd to Adobe Designer: course_introduction-v3.pdf July 2008

EXPECTED ENROLLMENT

COURSE OFFERING CYCLE - eg. "yearly," "every two years," "as needed"
(Provide explanation if not yearly)

DURATION OF DELIVERY Weeks/Terms

Hours per week

REQUIRED OR ELECTIVE COURSE (indicate degree program)

IS THERE ANY ADITIONAL COST IN TERMS OF STAFF, FACILTIES OR EQUIPMENT?
(If yes, a statement from the Budget Dean must be appended) Yes ☐ No ☐

TO BE APPENDED FOR ALL COURSES INTRODUCED

☐ Course Outline

Format: A short description of the intent of the course with concise and accurate statements of the main topic or conceptual areas to be covered. Clarify the nature of the course, such as whether it is theoretical or practical, laboratory, seminar, or other form. Identify required textbook (s) (if applicable). Include a statement on Academic Dishonesty and a breakdown of the the course is evaluated.

☐ Letters of support (if necessary, from units perceiving duplication or overlap)

☐ Library Resource Statement

Note: The library must be provided with a course outline as described above. As well, the proposing unit and the subject librarian should discuss and agree upon the bibliography to be used in assessing the strength of the library's collection in the field. The library will need at least one month notice of course proposals, and six months notice of program proposals, in order to prepare its statement.

SIGNED APPROVAL

HEAD OF DEPARTMENT ______________________

CHAIR, FACULTY GRADUATE COMMITTEE ______________________

BUDGET DEAN ______________________

DATE OF UNIT FACULTY COUNCIL APPROVAL ______________________

course_introduction-v3.pdf
July 2008

Attachment 7

Appendix 5

UML Standards for List-Checking

When checking a bibliography or citation list against UML holdings, use the following table to determine the assessment level.

Number held	Level
95% - 100%	5
80% - 94%	4
65% - 79%	3c
50% - 64%	3b
30% - 49%	3a
6% - 29%	2
1% - 5%	1
0	0

Assessments will be based on the Total holdings of all UML libraries. Where more than one library holds the same subject, this information should be noted in the comments area. An indication of which library has the primary responsibility or collection should be noted, if appropriate.

NORTH CAROLINA STATE UNIVERSITY LIBRARIES

Collections and Journal Cancellation Review 2014

http://www.lib.ncsu.edu/collections/collectionsreview2014

NC State Home | RESOURCES | search ncsu.edu

NCSU LIBRARIES | FIND | GET HELP | SERVICES | LIBRARIES | ABOUT

Search books, articles, journals, website

ASK US | MY ACCOUNT | HOURS | FAQ | LOG OUT | CHAT NOW

- 2014 Collections Review Home
- List of Journals to be Cancelled
- List of Databases to be Cancelled
- Expanding Online Only Journals
- Letter from Director of Libraries
- Timeline
- Review Process
- Factors to Consider
- FAQ
- Contact Us
- NC State Budget Central

- Collection Management Home
- Collection Management Projects
- Suggest a Purchase
- Gifts/Donations
- Collection Management Staff

Collections and Journals Cancellation Review 2014

In consultation with the University Library Committee and the Departmental Library Representatives, the NCSU Libraries is preparing for FY 2014/2015 cuts to the collections budget of approximately $750,000 – about 7.5% of the 2013/2014 allocation. Projected budget reductions from the university, combined with expected inflation for journals and databases of $550,000 (at a 7% annual inflation rate), necessitate preparations for steep reductions to the collection.

A comprehensive review process that included input from faculty, staff, and students has identified 628 journals for cancellation (effective as of January 2015) and 34 databases (termination varies depending on renewal date). Current paid subscriptions to these resources will be cancelled pending final budget confirmation; this list includes some journals and databases where cancellation is dependent on publisher negotiations.

› List of Journals to be Cancelled

› List of Databases to be Cancelled

Further cuts to the Libraries budget may result in the cancellation of additional databases and all 914 journals included in the review, including the 263 journals saved from cancellation based on campus input and overall usage.

While the review process has gathered as much data as possible to try to minimize the relative impact of collections cuts, reductions of this magnitude will result in the cancellation of important journals and databases that will have a lasting impact on the ability of the Libraries to meet the research and teaching needs of the university.

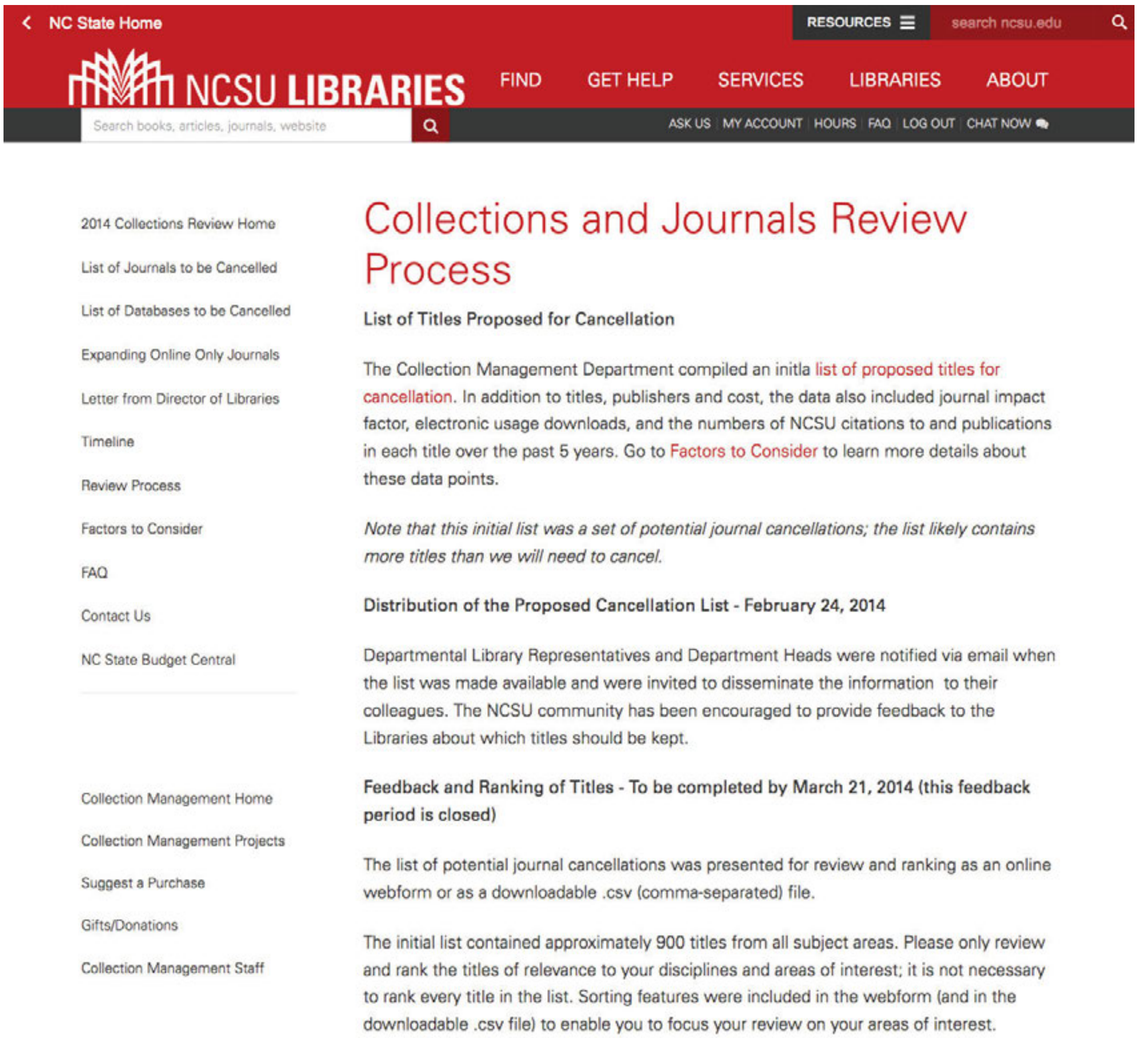
An FAQ is available that addresses a number of potential questions about the collections review including the Libraries' commitment to document delivery for canceled titles, moving journal titles to electronic only to realize savings on subscriptions, and the timeline for the overall process.

If you have strong concerns about journals and databases included in this list, please contact us. Please see the 2014 Collections Review website for more information.

NORTH CAROLINA STATE UNIVERSITY LIBRARIES

Collections and Journals Review Process

http://www.lib.ncsu.edu/collections/collectionsreview2014/process



NC State Home

RESOURCES

search ncsu.edu

NCSU LIBRARIES

FIND GET HELP SERVICES LIBRARIES ABOUT

Search books, articles, journals, website

ASK US | MY ACCOUNT | HOURS | FAQ | LOG OUT | CHAT NOW

- 2014 Collections Review Home
- List of Journals to be Cancelled
- List of Databases to be Cancelled
- Expanding Online Only Journals
- Letter from Director of Libraries
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- NC State Budget Central

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Collections and Journals Review Process

List of Titles Proposed for Cancellation

The Collection Management Department compiled an initla list of proposed titles for cancellation. In addition to titles, publishers and cost, the data also included journal impact factor, electronic usage downloads, and the numbers of NCSU citations to and publications in each title over the past 5 years. Go to Factors to Consider to learn more details about these data points.

Note that this initial list was a set of potential journal cancellations; the list likely contains more titles than we will need to cancel.

Distribution of the Proposed Cancellation List - February 24, 2014

Departmental Library Representatives and Department Heads were notified via email when the list was made available and were invited to disseminate the information to their colleagues. The NCSU community has been encouraged to provide feedback to the Libraries about which titles should be kept.

Feedback and Ranking of Titles - To be completed by March 21, 2014 (this feedback period is closed)

The list of potential journal cancellations was presented for review and ranking as an online webform or as a downloadable .csv (comma-separated) file.

The initial list contained approximately 900 titles from all subject areas. Please only review and rank the titles of relevance to your disciplines and areas of interest; it is not necessary to rank every title in the list. Sorting features were included in the webform (and in the downloadable .csv file) to enable you to focus your review on your areas of interest.

We used a three-tiered ranking system based on the important to your research and teaching:**1 - Top Priority, 2 - Medium Priority, 3 - Low Priority**. Select the appropriate rank for each title in your areas of interest. There is no need to select a ranking for titles that are not relevant to your areas of interest.

At any time during the review process feel free to contact the Libraries with questions. Librarians will also be happy to visit departments to talk further about the process and answer your questions.

Results of Campus Feedback List - April 15, 2014

The Collection Management Department compiled the feedback received and shared results with the campus community. A revised list of cancellations will be distributed for comment in mid-April; this list will include both journals and databases. The proposed list of database cancellations will first undergo thorough review by subject specialists librarians. This comment period will end on **May 7, 2014.**

Final List of Cancellations - May 12-16, 2014

The final list of cancellations will be posted by the Libraries and University Library Committee in late May.

Execution of Cancellations - July-August, 2014

By August 1, the Libraries will have a final list of titles and will submit these to our serials agents for cancellation.

Questions

If you have questions, please contact us and check out our FAQs.

NORTH CAROLINA STATE UNIVERSITY LIBRARIES

Explanatory Notes and Factors to Consider

http://www.lib.ncsu.edu/collections/collectionsreview2014/factors

Explanatory Notes and Factors to Consider

When reviewing the list of journals proposed for cancellation, you will have several data points available to you as you review the list. Below are some tips on understanding what you are seeing and how this data should influence your decisions.

Title

Journal titles listed in the proposed cancellation list represent **paid subscriptions**. Through consortial partners such as TRLN, the NCSU Libraries has license agreements with several publishers that allow us access to a broader selection of titles (a.k.a. non-subscribed titles) beyond our subscribed list. Typically, after cancelling a subscribed title the Libraries will maintain electronic access to the subscribed years/backfiles of a title. However, if we cancel or decide to not renew a collection of journals, we may lose all access to the additional non-subscribed titles. In cases where a journal is available as open access, feedback is requested specifically for our paid subscriptions of these journals (which could be for print, print+online, or online only formats). If we were to cancel the paid subscriptions, we would rely on the open access versions of these journals and include them in our catalog and content discovery tools. However, when considering whether or not to wholly rely on the open access version of a journal, it is important to take into account the sustainability plan of the open access journal, any embargo periods of open access journals ("delayed open access"), as well as the extent to which the journal makes its content open access (e.g., "hybrid open access" or "partial open access").

Call Number

The call numbers listed follow the Library of Congress classification scheme and represent specific elements such as subjects and author/publisher identifiers.

Publisher

The publishers listed are the most current known providers of the journals.

Explanatory Notes and Factors to Consider

http://www.lib.ncsu.edu/collections/collectionsreview2014/factors

Format

The format can be in one of three configurations: online-only subscription, print-only subscription, and a combination of print + online subscription. The format is often determined by the subscription model, which differs from publisher to publisher. In some instances, the publisher requires that the Libraries subscribe to both the print and electronic versions of a title at a combined cost when the electronic version is not available as a separate subscription. Even when the electronic version can be purchased without the print, there may be little, if any, cost savings. With some publishers, online access comes "free" with a print subscription. Other publishers provide a small savings (usually 5-10%) for online-only access. It should be remembered that the savings from moving to online-only subscriptions and cancelling the print counterpart can only be realized once. While switching to online-only subscriptions eliminates some costs of processing print materials (e.g., receipt and processing, shelving, binding, circulation, stacks maintenance), new costs are created (licensing, cross-resource linking, maintaining and troubleshooting access). In making the decision to subscribe to online-only resources, the Libraries will evaluate whether there is a reliable archiving model such as LOCKSS and/or Portico in place for a title before cancelling the print format.

Downloads

These counts represent the number of Full-Text Article Downloads, as reported by publishers according to COUNTER Codes of Practice. The electronic usage download data is provided for the years 2011, 2012, and 2013. Not all publishers provide electronic usage data, therefore, some titles will have a null value. It's also important to remember that print-only subscriptions will not have data for "Downloads" - the usage for print-only journal subscriptions will have a null value.

Unit Price

Unit Prices listed reflect the individual subscription cost for a journal and may not reflect the actual cost of a journal when it is part of a package. High cost of a journal should be weighed against importance to the NCSU community and other factors.

Subject

Each journal is assigned to a broad disciplinary group based on Library of Congress subject designations.

Impact Factor

From the Institute for Scientific Information's (ISI) Journal Citation Reports database, the journal impact factor is the number of cites in a particular year (e.g., 2012) to articles published in the two preceding years (e.g., 2011 and 2010) divided by the number of published articles in that same time period (2011 and 2010). If a journal is not indexed by ISI, there will be no journal impact factor.

Cited by NCSU authors (most recent 5 full years of available data)

This data shows the total number of citations to journals by NCSU authors summed over 2008-2012. If the Institute for Scientific Information (ISI) does not index a title, then there will not be a value in this field. This does not mean that the journal has not been cited, it simply means that this data is not available from ISI. This value could be a good indication of a journal's relevance to subject areas in which NCSU researchers are publishing. This data comes from LJUR (Local Journal Utilization Report) data that is developed by the Institute for Scientific Information (ISI).

Publications by NCSU authors (most recent 5 full years of available data)

This data shows the total number of articles written by NCSU authors summed over over 2008-2012. If the Institute for Scientific Information (ISI) does not index a title, then there will not be a value in this field. This does not mean that no NCSU authors have published in a given journal, it simply means that this data is not available from ISI. This data can indicate relative importance of journals in terms of research and publishing activity. It comes from the LJUR (Local Journal Utilization Report) data that is developed by the Institute for Scientific Information (ISI).

Local Journal Utilization Report

The Local Journal Utilization Report (LJUR) is a statistical database listing the frequency with which an institution's researchers publish in journals indexed in Web of Science, and the frequency with which they cite journals and other works (theses, government reports, etc.) in their publications. These frequencies are calculated annually. Each article from approximately 8,500 journals indexed by Web of Science is searched for author affiliation. If any of the authors list North Carolina State University as their address, their article is included in the NCSU LJUR data.

The NCSU Libraries uses the LJUR data to provide an estimate of the importance of research journals to the NCSU community. When listing journals for the serials review, the NCSU Libraries includes the data from the last five available years of the LJUR in two categories: number of publications by NCSU authors and number of citations by NCSU authors. Along with price data and other local holdings, the LJUR data helps the community to assess the importance of specific journals to NCSU research.

River Campus Libraries

University of Rochester

Guiding Principles for Collection Management and Development

- The teaching, learning and research activities of UR faculty and students are at the center of our activities.
- Our current collections reflect the University's current courses, curriculum and research.
- Our special collections support study, teaching and advanced research and document the history of our University and community, guided by a policy available online.
- We base our decisions on evidence from the University's Office of Institutional Research:
    - enrollment and faculty size
    - research grants
    - external standards and trends
- We actively manage our collections, aiming to strike a balance between well planned collection development, curation and demand driven acquisitions.
- The reading and research practices of our community are changing as more books and resources are published online. We recognize that print materials continue to be important for some disciplines, even as readers discover new formats.
- We steward our print collections with care, acquiring and retaining only one copy unless demand requires more.
- We are mindful of the costs of maintaining and preserving physical and digital collections.
- We are committed to the ongoing assessment and adaptation of our strategy and procedures.
- We look for opportunities to collaboratively collect and share collections/resources within the Libraries, with University partners and beyond.
- We actively support deep collaborative relationships with faculty and with student groups regarding our collections.

HA/3/27/15

Rush Rhees Library · Rochester, NY 14627

UNIVERSITY OF ROCHESTER LIBRARIES

Collection Development and Management staff intranet

Collection Development and Management

- Home
- About the Collections
- Guiding Principles
- Collections Strategy
- Find a Librarian
- Access issues & questions
- Alumni Access
- Annex
- Approval Plans
- Book Donations
- Book requests/orders
- Budget and Finance
- Collections Allocation Program (CAP)
- Collection Evaluation and Comparator Schools
- Collections Snapshots
- Consortia and Memberships
- Cost sharing with other libraries
- Database Requests and Trials
- Desiderata
- ebooks
- Ebsco
- GOBI & YBP
- GreenGlass
- ILL data
- LC Classes
- Liaison
- Licensing
- Microforms Review
- Patron Driven Acquisitions
- Reserves and Blackboard
- Stacks - Rush Rhees
- Subscriptions
- Usage

Evaluation

Content under development.

To evaluate our collection, we may wish to compare it against the collections of other schools. The following libraries are recommended for high level comparisons. . .

Brown University

Case Western University

Vanderbilt University

Washington University at St. Louis

For a subject specific comparison, select schools you know have strong collections in the discipline and that are recognized by your faculty.

- Carnegie Classification
  System for classifying colleges and universities in the US. Use it to identify groups of roughly comparable institutions

LC Class and Call Numbers

- LC Classes and librarians responsible for Rush Rhees Stacks
  To be used for collection review, questions, etc.
- Library of Congress Classification Outline
  Identify that pesky call number range for, what was the subject?
- LC Linked Data
  Use this page to search the LC Classification by keyword. Useful to identify which LC Classes apply to a subject or area study.

Use GreenGlass to compare your collection to groups of libraries

- Green Glass Tips and Help for outreach librarians

Use GreenGlass to compare our print collections to groups of local, New York State and regional academic libraries, or view a snapshot of our print collection as it was in 2014. During Summer 2015, collections librarians completed data sheets using GreenGlass to accompany their annual **Collection Snapshot** updates.

GreenGlass is a web application that allows single libraries and library groups to explore and visualize their collections in the context of peer libraries.

Contact Helen Anderson regarding access to **GreenGlass.**

- What can GreenGlass tell us about our collections?
  handout from March 2015 drop in session
- List of comparator libraries and groups used in first GreenGlass instance
- Key to Voyager locations used in GreenGlass
- GreenGlass tutorials

Using Worldcat Expert Search to compare your collection to peer collections

Sometimes you need to compare part of the collection (e.g. dance, or film) to another library. While we can use GreenGlass to compare our collections to peers, we cannot focus in on individual libraries.

Even without fancy tools like the OCLC Collections Analysis Suite, we still can do some pretty spiffy comparisons of our print collections using the expert search function in Worldcat!

Years ago, at the Charleston Conference I attended a session about the the then Worldcat Collection Analysis tool (known in 2016 as the OCLC Collections Analysis Suite). I also attended a session on how librarians at the College of Charleston were using plain old Worldcat to compare their collections to those of their peers. Their handout and power point slides were very specific about how to do it.

Since then, several successful humanities budget requests have included supporting documentation using these methods.

- U Rochester cheat sheet for Worldcat Expert Search
- How Different are You? College of Charleston Presentation at the 2007 Charleston Conference
  Powerpoint includes precise detail on how they used Worldcat expert search to compare their collection to others. First steps Decide which libraries you want to compare to, verify that their holdings are well represented in Worldcat and list the LC class numbers you want to zero in on. We'll be posting a cheat sheet soon.
- OCLC Conspectus
  Spreadsheet maps LC Class numbers to Dewey numbers, if needed.
- LC Classification Outline
  Looking for a call number range?

UNIVERSITY OF ROCHESTER LIBRARIES
GreenGlass Data Input Sheet

Data Input Sheet		Notes
Tip 1: Start by going to the Box folder "Collections Snapshots 2015" and look for templates, instructions, a link to GreenGlass and other data.		
Tip 2: The items on this template are organized based on the order of the steps you will take in Greenglass. For each line, set up the query and type the number of "Matched" results below in column B "Items" according to the instructions. The data you input here will magically be presented in the "final" worksheet.		
Tip 3: Remember to re-set earlier settings to "no restriction" before adjusting your query for the next item		
1. Header Information		
Type your subject here		
LC Class: TP		Classification Outline." If the online outline isn't detailed enough, ask Kostya or Marcy if you can borrow the print books from the shelves near Kostya's desk.
Locations Analysed: CarlsonStacks, CarlsonOversize, Carlson Reference,All Annex/Offsite locations		These are the standard locations that we are analysing this year. You may want to look at Rare Books but let's make that a separate project.
Stakeholder Departments/programs: Chemical Engineering		
2. Size of collection: Use Greenglass to identify and record the number of ***"Matched"*** items in each location	**Items**	Do a GreenGlass query for each of these locations to identify the total number of books in each location. The percentages should fill in themselves.
a. Carlson Stacks		
b. Carlson oversize		
c. Carlson Reference		
d. All Annex locations		
3. Age of collection: Tick all locations and LC Classes that you are analysing. Record the number of ***"Matched"*** items in each category	**Items**	Start by creating a query for the LC ranges you are interested in and limit it to all of the locations listed in the previous section. Then limit by publication date as indicated in the notes for each cell below.
a. Publication Year after 2009		Publication year between 2010 and 2014
a. Publication Year after 2004		Publication year between 2010 and 2014
a. Publication Year after 1999		Publication year between 2010 and 2014
d. Publication year between 1950-1999		Publication year between 1950 and 1999
e. Publication year between 1900-1949		Publication year between 1900 and 1949
f. Publication year before 1924 all locations (in public domain)		Publication year before 1924
4. Compared to other libraries: Start by setting *"Edition Matching"* to *"any edition."* Retain settings for all locations and LC Classes that you are analysing. Record the number of ***"Matched"*** items in each category	**Items**	section. It won't affect the HathiTrust comparisons (these are made directly against the HT catalog) but it gives the most accurate data for all other comparisons which ARE made against OCLC records.
a. US holdings more than 99		Set edition matching to "any edition" and set US holdings to "more than 99"
b. US holdings less than 26		Set edition matching to "any edition" and set US holdings to "less than 26"
c. US holdings less than 6		Set edition matching to "any edition" and set US holdings to "less than 6"
d. Rochester area equals 0		Set edition matching to "any edition" and Rochester Area to "fewer than 1"
e. CRL and Linda Hall more than 0		Set CRL and Linda Hall to "more than 0"
f. Publication Year before 1924 AND HATHITRUST set to "Items NOT held in HathiTrust"		Set publication year to "before 1924" and HATHITRUST to "Items NOT held in HathiTrust"

g. HATHITRUST set to "Items in HathiTrust - Public Domain ONLY"		Set HATHITRUST to "include items that meet the following criteria: "Items in HATHITRUST – Public Domain ONLY"
h. HATHITRUST set to "Items in HathiTrust - In Copyright Only"		Set HATHITRUST to "include items that meet the following criteria: "Items in HATHITRUST – In Copyright ONLY"
5. Overall Circulation Start by setting **"Location"** to include only the main circulating locations for this discipline (eg. CARLSTACK, RHEESSTACK, ARTSTACK, and/or POA STACK, etc.). Here we look at charges for items added to the collection first since the inception of Voyager in 1997 and then in 5 year chunks. Record the number of "Matched" items in each category.		
a. Total Items		
b. Recoded Uses equals zero		
c. Added after 1999	**710**	
d. Added after 1999 AND Recorded Uses equals zero	**244**	
e. Added after 2004	**413**	
f. Added after 2004 AND Recorded Uses equals zero	**196**	
g. Added after 2009	**185**	
h. Added after 2009 AND Recorded Uses equals zero	**129**	
6. Distribution by LC Class: Optional. Use this area creatively to analyse part(s) of the collection as you see fit. Here is a link to the LC Classification Outline: http://www.loc.gov/catdir/cpso/lcco/. Add lines and columns as needed. It will be incorporated into the "final" worksheet later on.		Use your creativity here. Bring circ data in if you like.
a.		
b.		
c.		
d.		
etc.		
7. Expenditures on books and subscriptions (3 year average FY 12 through FY 14). Look for this data in the GreenGlass folder "Other Data Sources:" https://rochester.box.com/s/md7bpv5jorynwlyx40vfqhs0mhpjtko7.		
a. monographs expenditures per CAR data		expenditures data drawn from CAR group spreadsheet "3 years allocations for monographs and expenditures for serials" cover FY12 through FY 14 Saved in Box in the GreenGlass folder "Other data sources"
b. serials expendtures per CAR data		use the latest "Serials payment statement" to get this information. Isolate the total charges to the fund for the discipline you are describing here.
c. Approximate number of active subscriptions in FY14 (to estimate this from Serials payment statement - scan title list for your fund and subtract number of duplicate payments from the total number of linesfor your fund).		Estimate drawn from serials payment statement. Select the fund for your disicpline then count the number of unique titles paid for in this 12 month report.
d. Cost of DDA titles triggered April 2014 through May 2015		Saved in Box in the GreenGlass folder "Other data sources"
e. Number of DDA titles triggered		
8. Key specialized licensed databases and online resources		
Type the brief names of the key subject specific licensed databases and online resources for this discipline.		
9. NOTES:		
What does the data tell us? What does it not tell us? What data would you like be able to gather easily in the future?		

UNIVERSITY OF ROCHESTER LIBRARIES

GreenGlass Annotated Spreadsheet for Chemical Engineering

Annotated Spreadsheet			Notes
Chemical Engineering			List the name of the snapshot or the list of the subject that you will cover in this document.
LC Class analysed: TP			If you don't know all the relevant LC Class numbers, Google "LC Classification Outline." If the online outline isn't detailed enough, ask Kostya or Marcy if you can borrow the print books from the shelves near Kostya's desk.
Locations Analysed: CarlsonStacks, CarlsonOversize, Carlson Reference,All Annex/Offsite locat			
Stake holder departments/programs: Chemical Engineering			
DATA FROM GREENGLASS (print books only):			
Size of collection:	**items**	**% of total**	Do a GreenGlass query for each of these locations to identify the total number of books in each location. The percentages should fill in themselves.
a. Carlson Stacks	2,367	61%	
b. Carlson oversize	1	0.03%	
c. Carlson Reference	156	4%	
d. All Annex locations	1,350	35%	
Total	**3,874**	**100%**	
Age of collection:			
a. Published 2010-2014 (most recent 5 years)	139	4%	
b. Published 2005-2014 (most recent 10 years)	331	9%	
c. Published 2000-2014 (most recent 15 years)	543	14%	
d. Published 1950-1999	2,743	71%	
e. Published 1900-1949	516	13%	
f. Published before 1924 all locations (in public domain)	189	5%	
g. Average no. of titles added per calendar year (2010-2014)	28	1%	
Compared to other libraries: Please fill out the calculations listed below and add any others that interest you.			
a. In HathiTrust Public Domain	449	12%	
b. In HathiTrust in copyright	1,975	51%	
c. At the Center for Research Libraries (CRL) (any edition)	2,944	76%	
d. Held by 100 or more US libraries (any edition)	2,866	74%	
e. Held by 25 or less US libraries (any edition)	217	6%	
f. Held by 5 or less US libraries (any edition)	35	1%	
g. Unique in the Rochester area (any edition)	2,649	68%	
h. Published before 1924 and not in HathiTrust	34	1%	
Overall Circulation			
a. Total items	2,367	100%	
b. Items with no recorded uses since initial Voyager load in 1997	2,270	96%	
c. Added between 2000 and 2005	297	100%	
d. Added between 2000 and 2005 with no recorded uses	48	16%	(added after 2000-01-01 AND recorded uses =0) MINUS (added after 2005-01-01 AND recorded uses = 0)
e. Added between 2005 and 2010	228	100%	
f. Added between 2005 and 2010 with no recorded uses	67	29%	(added after 2005-01-01 AND recorded uses =0) MINUS (added after 2010-01-01 AND recorded uses = 0)
g. Added after between 2010 and 2014	710	100%	
h. Added after between 2010 and 2014 with no recorded uses	244	34%	
Expenditures on books and subscriptions (3 year average FY 12 through FY 14)			
a. total allocation/expenditures	$79,789	100%	

UNIVERSITY OF ROCHESTER LIBRARIES

GreenGlass Annotated Spreadsheet for Chemical Engineering

Annotated Spreadsheet			Notes
b. book expenditures (firm orders only)	$5,331	7%	expenditures data drawn from CAR group spreadsheet "3 years allocations for monographs and expenditures for serials" cover FY12 through FY 14 Saved in Box in the GreenGlass folder "Other data sources"
c. subscription expenditures	$74,458	93%	use the latest "Serials payment statement" to get this information. Isolate the total charges to the fund for the discipline you are describing here.
d. Number of active subscriptions in FY14	35		Estimate drawn from serials payment statement. Select the fund for your disicpline then count the number of unique titles paid for in the 12 month report.
e. Cost of DDA titles triggered (April 2014 through May 2015)	$0	0	Saved in Box in the GreenGlass folder "Other data sources"
f. Number of DDA titles triggered	0		
Key specialized licensed databases and online resources			Which key databases would be important for a new librarian to know about
IEEE Xplore, Web of Science, ACM digital library, Comepndex			
NOTES:			Anything else you would like to say about this data snapshot. Eg. What did you find most interesting?
Most of the funds go to the online subscriptions. Carlson holds a large number of old Chem			

UNIVERSITY OF ROCHESTER LIBRARIES

GreenGlass Annotated Spreadsheet for Chemical Engineering

Chemical Engineering		
LC Class analysed: TP		
Locations Analysed: CarlsonStacks, CarlsonOversize, Carlson Reference,All Annex/Offsite locations		
Stake holder departments/programs: Chemical Engineering		
DATA FROM GREENGLASS (print books only):		
Size of collection:	**items**	**% of total**
a. Carlson Stacks	2,367	61%
b. Carlson oversize	1	0.03%
c. Carlson Reference	156	4%
d. All Annex locations	1,350	35%
Total	**3,874**	**100%**
Age of collection:		
a. Published 2010-2014 (most recent 5 years)	139	4%
b. Published 2005-2014 (most recent 10 years)	331	9%
c. Published 2000-2014 (most recent 15 years)	543	14%
d. Published 1950-1999	2,743	71%
e. Published 1900-1949	516	13%
f. Published before 1924 all locations (in public domain)	189	5%
g. Average no. of titles added per calendar year (2010-2014)	28	1%
Compared to other libraries: Please fill out the calculations listed below and add any others that interest you.		
a. In HathiTrust Public Domain	449	12%
b. In HathiTrust in copyright	1,975	51%
c. At the Center for Research Libraries (CRL) (any edition)	2,944	76%
d. Held by 100 or more US libraries (any edition)	2,866	74%
e. Held by 25 or less US libraries (any edition)	217	6%
f. Held by 5 or less US libraries (any edition)	35	1%
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Overall Circulation		
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f. Added between 2005 and 2010 with no recorded uses	67	29%
g. Added after between 2010 and 2014	710	100%
h. Added after between 2010 and 2014 with no recorded uses	244	34%
Expenditures on books and subscriptions (3 year average FY 12 through FY 14)		
a. total allocation/expenditures	$79,789	100%
b. book expenditures (firm orders only)	$5,331	7%
c. subscription expenditures	$74,458	93%
d. Number of active subscriptions in FY14	35	
e. Cost of DDA titles triggered (April 2014 through May 2015)	$0	0
f. Number of DDA titles triggered	0	
Key specialized licensed databases and online resources		
IEEE Xplore, Web of Science, ACM digital library, Comepndex		
NOTES:		
Most of the funds go to the online subscriptions. Carlson holds a large number of old Chem Engin publications with low usage. We can think about weeding the old materials.		

Sharing Collection Data

1.G. Library and Learning Resources

Governance and Administration

The University of Georgia Libraries is an ARL member institution with a collection of over 4 million titles and 5 million volumes which support the myriad of research and study conducted at one of the major research universities in the southeast. In collections spending, the University of Georgia Libraries ranks 46th out of 115 ARL libraries. Consistent support since FY10 as part of the University's library collection budget re-building project has resulted in a steady increase from 2009. The Library has strongly supported and partnered with the School of Music by funding the acquisition and maintenance of music materials in a variety of formats, providing comfortable and outstanding facilities, and providing a large staff dedicated to the collection, acquisition, cataloging and circulation of music materials.

The University of Georgia Libraries maintains one of the most significant music collections in the Southeast region. The music collections are comprised of two parts: the Music Research Collection of print books, scores, and periodicals located in the Main Library on North Campus, and the Music Library, a limited local resource collection and location of all music audio/visual materials except LP sound recordings, located in the Hugh Hodgson School of Music. Both collections are under the general supervision of the Head of Music Collections, who is a member of the Libraries faculty and the music bibliographer responsible for all issues of collection management and operations.

Collections and Electronic Access

Materials for the music collections in the University of Georgia Library are selected to meet the needs of general students, Music majors and the Music faculty. The acquisition policy for music materials is very broad and allows for the purchase of all styles and types of music from the traditional classical masterworks to representative examples of contemporary popular music styles and world music. The policy also covers acquisition of the following print score formats: full scores, miniature scores, scores with up to 9 parts, piano reductions of vocal and concerted works. A major exclusion in the policy concerns the acquisition of multiple copies of choral works or full sets of performance parts for orchestra or band. The choral, orchestra, and band departments acquire performance materials and maintain individual libraries for their respective areas.

Acquisition of traditional print books is equally broad covering all the major aspects of music history and performance, ethnomusicology, popular music history and criticism, music theory, music business, computer applications in music, etc. Books with accompanying materials, audio/video or computer software, are purchased on a regular basis and are housed in the Main Library. Music computer software is acquired more selectively.

The Library currently maintains an approval book plan with Yankee Book Peddler (YBP), a score approval plan with Theodore Front and a CD approval plan also with Theodore Front. Detailed profile parameters have been established with these vendors so that books, scores and CDs which meet the collection criteria are automatically shipped to the Library. In addition, the Librarian and the Music Library Supervisor regularly review publisher catalogs for materials not received through approval plans to ensure that the majority of scholarly and popular book in English, as well as a significant number of International and foreign language music publications are examined. After careful consideration, those materials which support the programs of study in music as well as related fields are added to the collection.

In addition to print books the Library provides access to ebooks via individual title purchases, patron-driven loan and purchase options, and ebook packages. The ebook titles added under the patron-driven model are titles which may not have been added as print titles but are added to the catalog so that they are readily available to students. The Library pays a rental fee and potentially a purchase fee based on the books usage. The Library is able to make available and consequently purchase ebooks which would not have been purchased from the regular music funds, thus increasing the books available to faculty and students. The ebook packages have been provided by GALILEO and have been multi-disciplinary packages which have included music. The most recent package purchased in 2015 provides over 1,000 titles which relate to music. These titles are added to the online catalog and made available to University of Georgia patrons.

The music librarian regularly solicits purchase recommendations for all formats and genres from the faculty through announcements at faculty meetings, in-person meetings with faculty and email correspondence. Faculty can submit purchase requests for materials needed for particular classes as well as materials core to their area of study and research. Both faculty and students submit requests directly to the music librarian and the Music Library Supervisor or submit their requests through an online form on the Library page to “Suggest a Purchase” (http://library.uga.edu/colldev/order.html). As a result of the collection efforts of Library staff the collection is comprehensive and varied in both subject and format.

Title Counts of Music Materials

Material Type	Total at end of FY 2015	Total at end of FY 2013	Added in last 2 years
Scores (Call # M)	81,237	77,036	4,201
Books (Call # ML)	34,579	32,898	1,681
Books (Call # MT)	7,773	7,480	293
Compact Discs	36,314	33,809	2,505
LPS	16,298	16,298	0
Video (VHS, DVD, Laser Disc)	1,466	1,460	6
Serials/Periodicals	171	N/A	NA
Collected Works/Continuations	136	N/A	NA

Online Resource/Electronic Access

The UGA Libraries provides access to over 540 subscription online databases for myriad of subjects and disciplines. The majority of these databases are funded entirely or partially by the University of Georgia Libraries; a significant number are funded or partially funded by the State of Georgia and made available to the higher education community in Georgia. Online music resources include a wide range of materials types such as dictionaries and encyclopedias, periodical indexes, full text databases and streaming audio. Subscriptions relevant to the School of Music and funded entirely by the UGA Library music allocation include:

- Oxford Music Online (contains Grove Dictionary of Music, Oxford Dictionary of Music, Oxford Companion to Music)
- Gove Dictionary of American Music
- Grove Dictionary of Music Instruments
- Oxford History of Western Music
- IPA Source (Phonetic transcriptions and translations of operatic arias and art song texts)
- RILM Abstracts of Music Literature (1967-present)
- International Index to Music Periodicals (IIMP)
- Music Index
- RISM Series A/II: Music Manuscripts after 1600
- NAXOS Music Library (NML)
- American Song
- Contemporary World Music
- Smithsonian Global Sound for Libraries

In addition to these music-specific resources, many of the Libraries' online indexes and full-text resources are cross-disciplinary in nature and frequently used in music research, such as JSTOR, Arts and Humanities Citation Index, Humanities International, Humanities & Social Sciences Index and Films on Demand. In addition, many online resources in subject areas such as education, psychology, history and business are extremely useful for research in music history, education, therapy, business and ethnomusicology.

Personnel

The UGA Libraries has a large number of highly trained and qualified librarians, classified staff, and student assistants responsible for the development and maintenance of the music collections. The Head of Music Collections and the Head of Music Cataloging are both librarians and hold masters' degrees in library science and music. The Head of the Music Collections is responsible for the acquisition of library materials, group library instruction and individual consultation, and library promotion and outreach. The School of Music Library supervisor holds a Ph.D. in music. In addition to teaching classes in the School of Music he oversees the daily operations of the School of Music Library, including the supervision of a classified staff member. This staff member works the circulation desk and oversees 4 to 5 student assistants who work approximately 60 hours per week. The Head of Music Collections and the School of Music Library supervisor share supervision and prepare annual evaluations for this position jointly.

The Head of Music Cataloging is responsible for both the cataloging of music materials and for supervising three classified staff members who assist with the cataloging of music materials. These staff members possess bachelors' degrees and significant knowledge and experience working with music materials.

The UGA Libraries funds both of the librarian's salaries and all but one of the classified positions. The Hugh Hodgson School of Music provides funding for the full-time Music Library Supervisor. The Federal Work-Study program or funds made available through the Main Library provide student assistant's wages.

Services

The Main Library Collections, which includes the vast majority of music books and scores, is available 109.5 hours per week during the following hours during the regular school term. Reference services are available for a majority of the hours the library is open: in person via the reference desk, or virtually via email, telephone, or instant messaging (online chat) service. Music students and faculty often contact the Music Librarian or Music Library supervisor directly.

Main Library General Collection Hours (During Term):

7:30 am - 2:00 am, Mon – Thu
7:30 am - 9:00 pm, Fri
10:00 am - 7:00 pm, Sat
1:00 pm - 2:00 am, Sun

The Hugh Hodgson School of Music Library which houses the compact discs, DVDs, videos and select music scores and books is open 72 hours per week during the following hours. The Music Library supervisor is often available during the day to answer questions, as is the Library assistant who has a degree in music and has worked circulation in the Main Library.

Hugh Hodgson School of Music Library (During Term):

8:00 am - 10:00 pm, Mon-Thu
8:00 am - 5:00 pm, Fri
1:00 pm - 5:00 pm, Sat (Closed home football game days)
2:00 pm - 5:00 pm, Sun

The music collections are available for use to all members of the University community. Residents of the State of Georgia also have access to the collections and can obtain limited circulation privileges.

Bibliographic access to the complete cataloged holdings of the Main Library research collection and the majority of the materials in the Music Library of the Hugh Hodgson School of Music is available through GIL (Georgia Interconnected Libraries), the Libraries online catalog, and through the Multi-Search, a discovery tool which allows users to search the online catalog and over 130 databases simultaneously for books, scores, CDs, streaming audio and journal articles. The user experience has become a priority in the design of search tools and the University of Georgia has customized the public interfaces of the GIL, the Libraries online catalog and the Multi-Search discovery tool. Features such as faceting and limits make it easier for music students to limit search and/or results to specific formats such as books, scores, sound recordings, streaming audio and videos.

Several options are available to the University community for obtaining materials not available in the University of Georgia Libraries collections. Users can search the Universal GIL Online Catalog, a consortial catalog for 35 public universities throughout Georgia, and request books and scores using a service called GIL Express. Items can be delivered directly to the School of Music Library within a couple days of the request. The same Universal Borrowing agreement allows faculty and students visiting one of these public universities to check out selected materials on site. The University of Georgia Libraries also maintains a consortial agreement with Emory University which allows University of Georgia faculty and students to check out select materials on site.

Interlibrary Loan remains a significant service for obtaining materials not owned by the UGA Libraries and the primary method for obtaining journal articles not owned by the UGA Libraries. This service allows users access to materials both nationally and internationally.

Music graduate students are required to take a bibliography course introducing them to significant resources in their discipline. Historically, the bibliography course for graduate music students has included one or two sessions during the course. These sessions highlight core online music resources and instruction on searching skills which can be applied to online resources in general. The University of Georgia does not require an orientation to the library or proficiency in library skills of its undergraduate students, but instructors can request sessions which will be customized to the needs of their students. Whether in person or via email, faculty are regularly made aware of opportunities for custom library instruction that can be integrated into a class or seminar.

Numerous online instructional and help pages have been created to assist both undergraduates and graduate students with the research process and with effectively using library resources (http://www.libs.uga.edu/undergraduates/index.html; http://www.libs.uga.edu/graduates/index.html; http://www.libs.uga.edu/researchguide/index.html). Instructional opportunities often occur when providing individual assistance to users—both faculty and students.

Facilities

The University of Georgia Libraries provides seven locations on the Athens campus. The Music Library provides convenient access to commonly used books, scores, pedagogical materials, and major curriculum series used in elementary and secondary school music programs, and also serves as the primary access point for music audio and video recordings, as well as all music course reserve materials. In addition to the resources, the Music Library has the requisite equipment to utilize the audio and video formats, computer and wireless access, and equipment to copy and/or scan printed resources.

The University of Georgia Libraries has traditionally paid for major expenditures for equipment located in the music school such as CD compact storage cabinets. In 2015, the Main Library purchased a fifth new CD compact storage cabinet to accommodate the growing CD collection. The UGA Libraries also provides and maintains computers for library use and a public photocopier. The Hugh Hodgson School of Music has paid for incidental purchases, such as headphones. Both the Main Library and the Hugh Hodgson School of Music purchase audio/video playback equipment at various times.

The Main Library collects material in the arts and humanities, social sciences and business. It also contains a large government documents collection, the Media Department, and a substantial microform collection. The Music Research Collection is located on the 2nd Floor of the Main Library, and includes books, scores, periodicals, and microforms.

As mentioned earlier, the music materials are divided between the Main Library and the Hugh Hodgson School of Music Library. In the past the administrators of the UGA Libraries, the Hugh Hodgson School of Music and the Lamar Dodd School of Art have discussed the potential of a fine arts library, but no progress had been made to further this conversation. In response to faculty and student concerns with immediate access to Library scores and books housed in the Main Library, several steps have been taken to provide access to electronic indexes, periodicals, scores, streaming audio and books. While the library does purchase electronic books and score collections on CD rom, the vast majority of the score and books in the collection are print. To improve access to these resources the Library has implemented a delivery system whereby music students and faculty can easily make an online request for circulating materials to be sent from the any UGA Library to the Hugh Hodgson School of Music Library where they can be picked up and checked out. The process takes 24 to 48 hours.

Another facility available to music students is the Miller Learning Center. At the heart of campus, this facility combines an electronic library, providing access to online journals and books, research databases and electronic indexes with research and study space for 2,240 students, 500 computers with the latest software, and a pervasive wireless network. Most notably, this facility is open 24 hours a day seven days a week much of the year in order to provide a unique study and research space available to students.

Finances

The budget allocation for all music materials (print and electronic books, scores, sound recordings, video and databases) for Fiscal Year 2016 is $ 151,939.00, but the amount expended for music materials will actually be closer to $160,000 (roughly $10,000 higher) as the figure does not include books which are purchased via the general account for the YBP approval plan. While not an explicit element in the University Libraries budget, the allocation structure for Music is similar to other areas and branches which receive a collection allocation supplied by the Main Library. Allocations for the music collections are managed by the Head of Music Collections and have been relatively stable for the past 5 years.

Expenditures have varied slightly as some continuations and standing orders fluctuate depending on the number of volumes published and received per year. Since the music budget has remained around $150,000 with some increases for inflation, no cuts have been needed regarding subscription journals, complete works and databases. Since increased in the library budget have not been significant, the addition of new resources has often required the cancellation of some existing resources. Review of existing subscription resources has become a priority with the goal of identifying resources no longer needed, thus releasing current funds to subscribe to resources which reflect current needs These reviews, which are a collaborative effort between the Head of Music Collections and the Music Faculty, consist of the identification, review and selection of materials for addition or removal. Below is a summary of the music allocation and general fund that are used for music materials.

Summary of Fund Allocation for Music Materials*

Funds	2014 Expenditure	2015 Expenditure	2016 Allocation
Music Funds	$ 150,762.06	$ 143,244.43	$ 151,939.00
General Funds (YBP Books)	$ 10,037.25	$ 11,589.17	($ 10,000.00+)
Total	**$ 160,799.31**	**$ 154,833.60**	**($ 161,939.00+)**

*A detailed breakdown of the budget by material type is found in the Management Documents Portfolio for the Library and Learning Resources.

Areas for Improvement

The daily delivery of scores from the Main Library to the Music Library for both students and faculty has been well received, and there are hopes to provide similar services for other types of materials. An extension of this would be to develop similar delivery services which increase the ease of access to a broader range of Library materials. For example, Interlibrary Loan Materials which currently require the user to check out and return items to the Main Library could be delivered directly to the Music Library. Additionally, articles from print journals could be requested by patrons, digitized by Library staff and then sent to the requester. The implementation of the services would be applied campus-wide and would require the cooperation of various Library departments in order to staff and fund all aspects of these new or expanded services.

Another goal is the addition of more online resources including books, periodicals, scores, streaming audio and video. As stated earlier, the allocation for music library materials is not increasing but is only keeping pace with inflation. Adding new online resources or print subscription would require additional funding or a change in how current funds are allocated. An ongoing goal is the regular evaluation of existing music resources to determine usage and value to current School of Music programs. The result would be the cancellation of materials deemed no longer necessary and the addition of more relevant and in-demand resources. The related goal is pursuing additional funding such as an endowment.

Lastly, special attention is being given to promoting the collection to faculty and students. This year a Facebook page and Twitter account are being used to publicize resources and services. The Library staff is seeking out additional opportunities to interact with both faculty and students to ensure that they are aware of the resources and services available through the Library. Throughout the University there is an increased level of accountability—making sure that what we are doing or purchasing is what users need. Online resources allow for the fairly easy gathering of usage stats. The Library is also gathering circulation stats for print books and shelving statistics for reference items and periodicals which do not circulate. By increasing awareness, the goal is to ultimately increase the usage statistics for many items.

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UIC Library Dashboard
http://library.webhost.uic.edu/library-statistics/

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Find
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- Databases A - Z
- Research and Subject Guides
- Dictionaries and more
- Course Reserves
- Newspapers

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- Giving to the Library
- Hours
- Library Faculty Research
- Library Policies
- Library/IT Assessment
- Locations
- Mission and Profile
- News and Events
- Staff Directory
- Service Alert
- UIC Library Dashboard

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UIC Library Dashboard

1.3 million
visits
to Research & Subject Guides
2015 »more

2.1 million
in-person visits
to the library
2015 »more

16,103
students
attended a class at the library
2015 »more

30,404
reference interactions
2015 »more

28,782
books borrowed
from CARLI I-Share Libraries
2015 »more

504,341
E-books
in the UIC collection
2015 »more

4.2 million
E-journal
article downloads
2014 »more

634
databases
available at the UIC library
2015 »more

19,108
publications
available in INDIGO
2015 »more

New library website

We're excited to share the beta version of our new library web site, which will launch in August 2016. Take a look at the new site. Have any comments or feedback? Fill out this survey.

Locations
- Richard J. Daley Chat is offline
- Health Sciences - Chicago
- Health Sciences - Peoria
- Health Sciences - Rockford
- Health Sciences - Urbana

Other Topics
- UIC Library Dashboard
- Giving to the Library

Book a Study Room
Library Events

Connect with us

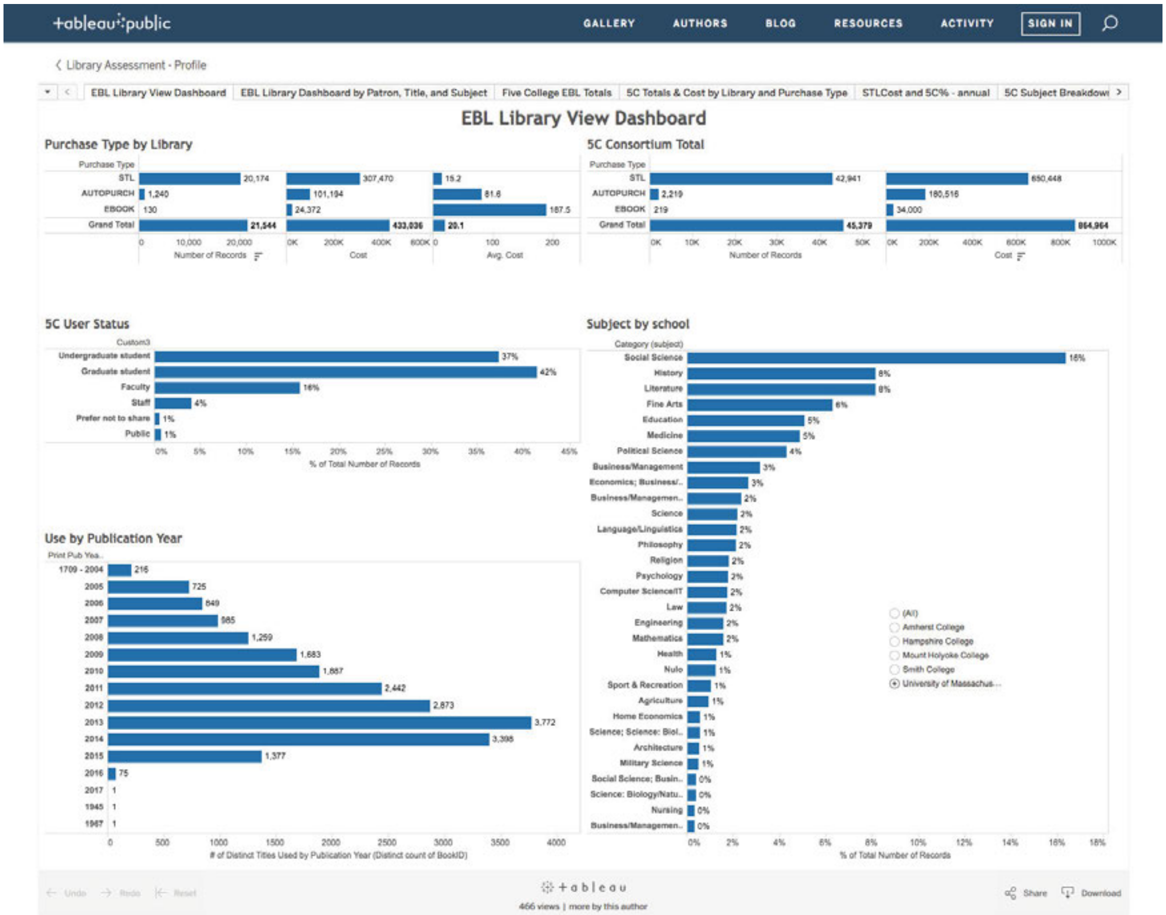
UIC

Contact us | Web Privacy Notice | Having problems accessing this site? Contact user support.
Site Feedback | Staff Intranet | Library Staff Login

UNIVERSITY OF MASSACHUSETTS AMHERST LIBRARIES

Tableau EBL Library View Dashboard

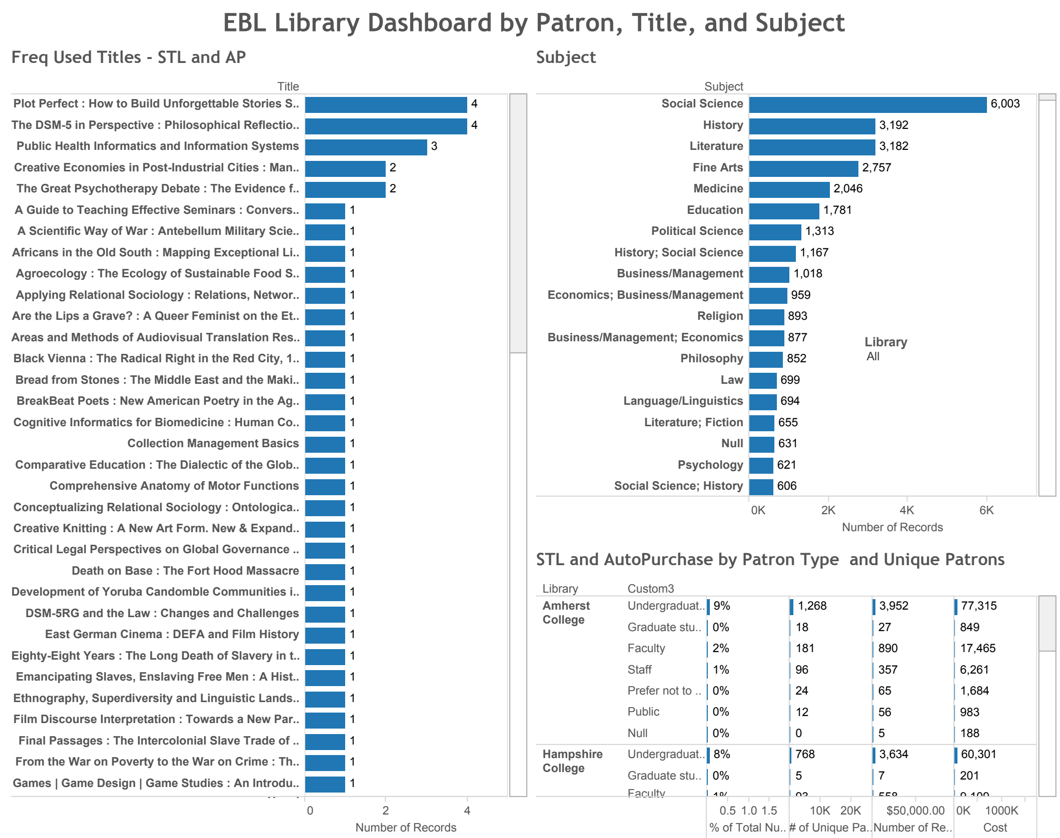
http://public.tableau.com/profile/library.assessment#!/



UNIVERSITY OF MASSACHUSETTS AMHERST LIBRARIES

EBL Library Dashboard by Patron, Title, and Subject

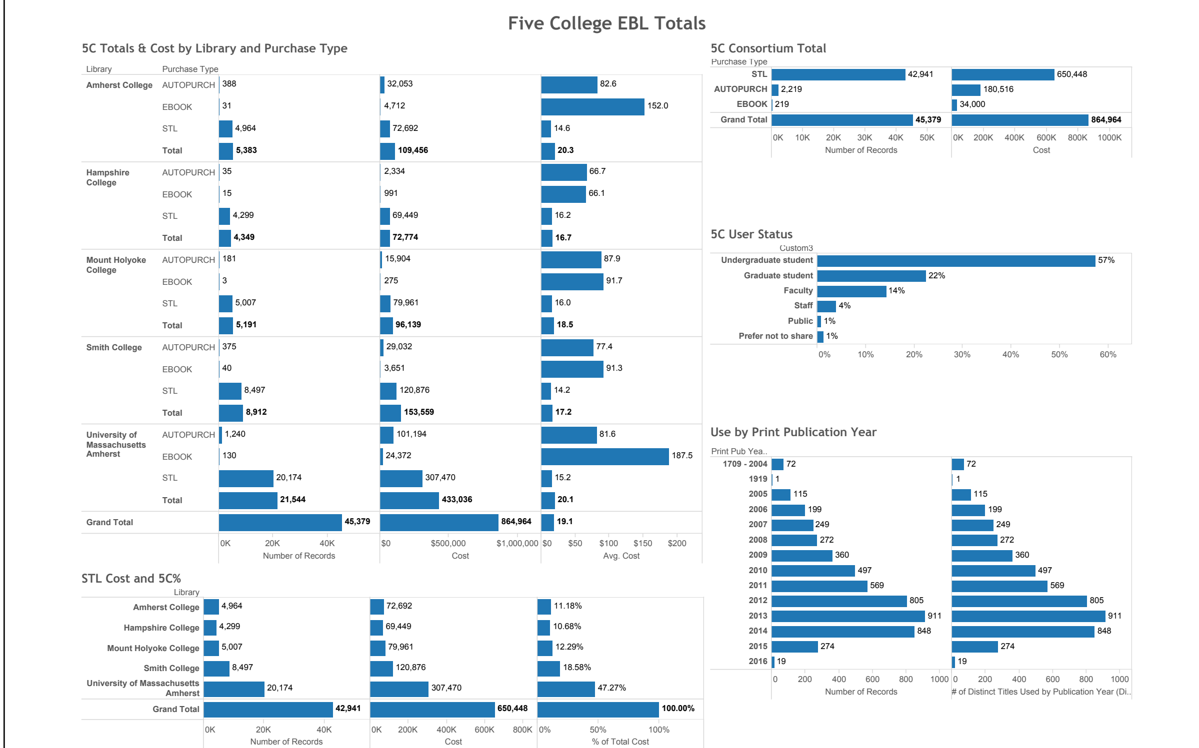
http://public.tableau.com/profile/library.assessment#!/



UNIVERSITY OF MASSACHUSETTS AMHERST LIBRARIES

Five College EBL Totals

http://public.tableau.com/profile/library.assessment#!/



mit LIBRARIES STAFF WEB

Selector's Toolkit: Analysis

Enter Search Words | Search

Home | Budget structures | Monographs | Serials | Government Documents | Wish lists | **Analysis** | Help | Index

Print Collection Use Reports

To see reports with circulation and fund information use Cognos reporting from the Data Warehouse.

Request access to the Data Warehouse to enable these reports. See the Libraries' documentation on Cognos or further information from IS&T.

- Which print titles/call numbers/collections are patrons in Department X borrowing?
  more...
- Who is using the X print collection in Y library?
  more...
- What was purchased on X fund (print only) and who is using it?
  This report also shows circulation by publisher and by acquisition method (firm order/approval).
  more...
- Which print items have the highest circulation in collection X?
  more...
- Which print items have low circulation from collection X?
  more...

Looking for older BrioQuery reports? See the Libraries Data Warehouse page.

Intota Assessment Print Collection Reports

You can use Intota Assessment to report on MIT Libraries print collection use. Login with your MIT email and use this Forgot my Password link if needed.

Intota uses MIT Libraries circulation and item records, cost information from Books in Print, and LC subject headings to provide the following reports:

- **Top Chart**: Top 10 publishers by expenditure and Top 10 publishers by circulation.
- **Print Cost by Publisher** and **Print Cost by Subject:** Reports Books in Print cost data and MIT circulation records to show total cost, total use, and cost per use at the publisher or LC subject heading level.
- **Check Outs by Year**: Title level circulation with graph by LC subject heading. (note that graph does not appear to include year, collection, location limits.)
- **Circulation Dynamics**: Title level circulation also reports date added, first use, last use, total use, and months since last use.
- **Print CPU (Item Level)**:
  Uses Reports Books in Print cost data and MIT circulation records to show total cost, total use, and cost per use at the title level.
- **Print Compare to RCL**: Compare our print collection to the Resources for College Libraries recommended list.

Electronic Collection Use Reports

Log into Intota Assessment with your MIT email and use this Forgot my Password link if needed.

Intota Assessment provides lots of reports. The most commonly used reports are:

- **Ejournal Report:** Full text article use by journal title.
- **Ejournal Turnaways:** The number of articles that MIT identified users attempted to access from titles/volumes that we we do not have access to.
- **Ebook Report:** Full text section or title use by book title.
- **Dbase Report:** Total searches, result clicks and record views

More answers can be found in the Intota Assessment User Guide. You may need to register for access to the Proquest Support Center. Your password for the Proquest Support Center might be different than your Intota password.

If you don't find the stats you want in Intota Assessment check Staff View for an admin URL and username/password to login at the vendor site to download use data.

To use Staff View, open Filemaker (v.12 or higher), open as a remote database using the name: fmnet://lib-filemaker.mit.edu/StaffView

Password and further instructions

Other use stats

- Older use data (archived)
  An archive of historical & current usage data librarians have collected from vendors. Includes data for titles not in Steelsonas. To access, go to the Remote(K:) Drive & open CSM folder.
  more...
- SFX Reports
  Reports on the number of times a journal or database has been accessed through our SFX link resolver.

Borrowing from Other Libraries

- ILB Report FY15
- ILB Report FY2014
  File available at R:\IDLA\ILB stata\F14 ILB Annual Report\fy14 ilb stats.xls
  See tabs labeled "Most requested journals" and "Most requested loans"
- ILB Report FY2013
  File available at R:\IDLA\ILB stata\FY13 ILB annual report\fy13 ilb stats.xls
  See tabs labeled "Most requested journals" and "Most requested loans"
- ILB Report CY2012
  Spreadsheet of ILB requests placed by the MIT community in 2012.
- Borrow Direct Reports
  Run reports on MIT's use of Borrow Direct.

Journal Citation Reports

Journal Citation Reports

Journal citation data, with impact factors, rankings, & half-lives of journals indexed by ISI Web of Science. Mostly science and social science journals. Frequent citation may be a proxy for usage.

Data discrepencies

Vendor notes on data discrepancies

Sometimes things go wrong. Sometimes vendors tell us about it. This file documents use data related errors or discrepancies that we have been notified about.

Last Updated: Jul 19, 2016 4:25 PM | **URL:** http://libguides.mit.edu/selectortoolkit | Print Page | Login to LibApps

NATIONAL INSTITUTES OF HEALTH

National Library of Medicine

Programs and Services

Fiscal Year 2014

US Department of Health and Human Services
Public Health Service
Bethesda, Maryland

LIBRARY OPERATIONS

Joyce E. B. Backus
Associate Director for Library Operations

The NLM Library Operations (LO) Division is responsible for ensuring access to the published record of the biomedical sciences and the health professions. LO acquires, organizes, and preserves NLM's comprehensive archival collection of biomedical literature; creates and disseminates controlled vocabularies and a library classification scheme; produces authoritative indexing and cataloging records; builds and distributes bibliographic, directory, and full-text databases; provides national backup document delivery, reference service, and research assistance; helps people to make effective use of NLM products and services; and coordinates the National Network of Libraries of Medicine to equalize access to health information across the United States. These essential services support NLM's outreach to health professionals, patients, families and the general public, as well as focused programs in AIDS information, molecular biology, health services research, public health, toxicology, environmental health, and disaster planning.

Library Operations also develops and mounts historical exhibitions; produces and manages a travelling exhibition program; creates and promotes education and career resources for K-12 and undergraduate students and educators; carries out an active research program in the history of medicine and public health; collaborates with other NLM program areas to develop, enhance, and publicize NLM products and services; conducts research related to current operations; directs and supports training and recruiting programs for health sciences librarians; and manages the development and dissemination of national health data terminology standards. LO staff members participate actively in efforts to improve the quality of work life at NLM, including the work of the NLM Diversity Council.

The multidisciplinary LO staff includes librarians, technical information specialists, subject experts, health professionals, educators, historians, museum professionals, and technical and administrative support personnel. LO is organized into four major Divisions: Bibliographic Services (BSD), Public Services (PSD), Technical Services (TSD), and History of Medicine (HMD); three units: the Medical Subject Headings (MeSH) Section, the National Network Office (NNO), and the National Information Center on Health Services Research and Health Care Technology (NICHSR); and a small administrative staff. A wide range of contractors provides essential support to the activities of all these components.

Most LO activities are critically dependent on automated systems developed and maintained by the NLM Office of Computer and Communications Systems (OCCS), National Center for Biotechnology Information (NCBI), or Lister Hill National Center for Biomedical Communications (LHNCBC). LO staff work closely with these program areas on the design, development, and testing of new systems and system features.

Program Planning and Management

LO sets priorities based on the goals and objectives in the NLM Long Range Plan 2006-2016, and the closely related NLM Strategic Plan to Reduce Racial and Ethnic Disparities. In FY2014, LO continued its work on the directions of its Strategic Plan for 2010-2015, within this broader framework.

The Technical Services Division (TSD) officially reorganized as of January 26, 2014. All selection, acquisitions, and licensing functions were integrated in one section, the Collection Development and Acquisitions Section. The Cataloging Section changed its name to the Cataloging and Metadata Management Section. The reorganization created a new section, the Library Technology Services Section, to manage the Division's systems support functions.

In the area of Developing a 21st Century Workforce, LO held four quarterly all-staff meetings in which new staff are recognized and updates from every area of LO are presented to those in the auditorium as well as staff listening in from off-site. LO continued its second full year of a Career Enrichment Program, a professional development program for selected LO staff to obtain a broader view of LO and NLM and to work on a project of institutional significance. LO also held ongoing discussion groups for supervisors. Capitalizing on a new Federal hiring initiative, Pathways for Recent Graduates, LO hired 17 recent library science graduates, representing 6 percent of its Federal workforce, in three Divisions. The new employees will work in acquisitions, e-resource management, reference, preservation, outreach, digitization, digital preservation, Web development, social media analysis and deployment, systems, data analysis, customer services, Web user experience, and education and training.

Collection Development and Management

The NLM comprehensive collection of biomedical literature is the foundation for many of the Library's services. LO ensures that this collection meets the needs of current and future users by updating the NLM literature selection policy; acquiring and processing relevant literature in all languages and formats; organizing and maintaining the collection to facilitate current use; and preserving it for subsequent generations. At the end of FY2014, the NLM collection contained 2,781,201 volumes and 23,867,056 other physical items, including manuscripts, microforms, prints, photographs, audiovisuals, and electronic media.

Selection

Publishing trends had an impact on the selection of new journals for the collection. The number of newly-launched journals decreased at some major medical publishers. The trend toward the "mega-journal" (a single journal that covers a wide number of disciplines) had an effect, as several publishers entered that arena and offered what might have previously constituted many new journals as a single title. Selection activity increased due to the adoption of somewhat more rigorous journal selection guidelines, necessitated in part by the proliferation of journals that do not meet the most basic standards of medical publishing.

Following the discovery of a large collection of uncatalogued World Health Organization documents that had been given to NLM in the past, selectors reviewed and sent many titles for cataloging. This collection includes reports on malaria and other infectious diseases, brief papers by notable medical scientists such as Jonas Salk, and reports on health conditions in Africa and Latin America, primarily from the 1940s and 1950s. The review of this collection will continue into the new fiscal year.

In their efforts to enrich the NLM collections, selectors focused on areas of critical national and international importance. For example, in response to the Ebola crisis, selectors identified books, reports, and video recordings on the science and history of the disease, as well as preparedness and response documents. HMD and TSD staff also worked to launch a Web collecting initiative to capture and preserve selected born-digital content documenting the Ebola outbreak. Examined content included Web sites and social media from Government and non-government organizations, journalists, healthcare workers, and scientists in the United States and around the world, with an aim to collect and preserve a diversity of perspectives on this health crisis.

Web content on other infectious diseases (such as influenza and tuberculosis) and topics such as health care reform, global health, and environmental health disasters were also acquired. The collecting rationale is to assemble a collection of works that are of interest to current researchers and that also chronicle health-related events that will be of interest to researchers in the future. National Digital Stewardship Resident Maureen Harlow conducted a project to collect Web content on Disorders of the Developing and Aging Brain: Autism and Alzheimer's.

LO also continued to collect blogs authored by doctors and patients, to illuminate health care thought and practice in the 21st century.

Acquisitions

TSD received and processed 114,197 contemporary physical items (books, serial issues, audiovisuals, and electronic media). The number of electronic-only serials grew to nearly 3,200 by the end of FY2014, now representing more than 18 percent of all currently acquired serials. In FY2014, 5,547 licensed and 4,415 free electronic journals were available to NLM users. A net total of 28,911 volumes and 4,810,440 other items (including non-print media, manuscripts, and pictures acquired by HMD) were added to the NLM collection.

Late in September 2014, NLM learned that Swets Information Services, a company that served as the primary serials subscription agent for NLM, filed for bankruptcy. The company based in the Netherlands, provided subscription services for hundreds of libraries around the world. Swets managed NLM orders for approximately 8,000 serial titles from over 3,300 different publishers in 66 countries. NLM was able to de-obligate the balance of funds from the contract prior to the end of FY2014, which prevented any loss of funds as a result of the bankruptcy. Orders for 2015 subscriptions will be handled by a new contractor (or contractors). The shut-down of Swets' facilities interrupted the delivery of issues to the Library, resulting in short-term gaps in the print collection. Many publishers contacted NLM and offered to ship issues directly, and staff contacted other publishers to request that issues be mailed to NLM. Electronic access was not impacted. Over 60 percent of the titles subscribed to via Swets are available electronically.

HMD acquired a wide variety of important printed books, manuscripts and modern archives, images, and historical films during FY2014, including an early German manuscript pharmacopoeia by an anonymous author, written around the year 1600, with later additions included. The pharmacopoeia is a recipe book with formulae for waters, electuaries, oils, ointments, etc., for combatting cancer, plague, jaundice, fevers, kidney and liver ailments, gynecological disorders, burns, fractures and other infirmities. Following the main text is a circa 1800 list of common abbreviations, an unfinished glossary (going only to 'C") of Latin chemicals and ingredients with German translations and a brief note about each, and an alphabetical list of ailments and conditions listing the main ingredients to be found in medicaments for their treatment.

Among the important printed books acquired in FY2014 are several early foreign language editions of Charles Darwin's *On the Origin of Species by Means of Natural Selection,* including versions in Russian, French, and Hungarian. The foreign translations of this groundbreaking work are important because they often include unique commentary by the translators, and because the theory of evolution that was promulgated in the book was received differently all over the world. These books provide insights into how the theory was presented, debated, and quickly spread throughout the scientific world.

NLM received a large collection of AIDS-related books as a gift from Dr. June E. Osborn. During the 1980s and 1990s, Dr. Osborn held numerous senior positions, including Chair of the National Institutes of Health National Heart, Lung and Blood Institute advisory committee on AIDS, the National Advisory Committee for the Robert Wood Johnson Foundation's AIDS Health

Services Project, and the US National Commission on AIDS. She was also a member of the Global Commission on AIDS of the World Health Organization.

The Library received a large donation of materials, many in Russian, from the National Aeronautics Space Administration (NASA). Many of the titles were included in the SPACELINE subset of MEDLINE but not previously held by NLM. (Between 1993-2005, information about space life sciences was provided by NLM in conjunction with the NASA SPACELINE Office as part of a collaborative agreement). This gift has enriched the NLM collection of works on space life sciences.

Significant acquisitions in the Archives and Modern Manuscripts Program during FY2014 included the electronic files of former Surgeon General Regina Benjamin, the archival records from HealthNet News/SatelLife, and 67 boxes of archival materials from former Surgeon General C. Everett Koop's family, which will be added to the existing NLM Koop collection. The Historical Audiovisuals program received a donation of 25 surgical training films produced by Davis & Geck of Danbury, Connecticut. This donation complements and expands our existing collection of Davis & Geck films.

Preservation and Collection Management

LO carries out a wide range of activities to preserve the NLM collection and make it easily accessible for current use. These activities include: binding, copying deteriorating materials onto more permanent media, conservation of rare and unique items, book repair, maintenance of appropriate environmental and storage conditions, and disaster prevention and response.

Collection Space and Maintenance

In FY2014, LO bound 14,516 volumes, repaired 685 items, made 811 preservation copies of films and audiovisuals, and conserved 583 items. A total of 363,277 items were shelved, a 9 percent decrease from FY2013 that reflects the decline in print material received at the Library and the decline in interlibrary loan and in requests by patrons in the Main Reading Room, due to increased availability of electronic journals.

Work continued on the long term project to install compact shelving on the B-2 level to increase storage capacity for collections in the NLM building. The project requires floor strengthening on the B-2 level and includes the complete upgrade of the fire suppression system and lighting for stack areas on the B-2 and B-3 levels, as well as an upgrade of the older compact shelving on the B-3 level. New space was created for the Preservation and Collection Management (PCM) Section staff, and future plans call for new space for HMD staff on the B-1 and B-2 levels. At the end of 2014, the project is 60 percent complete, providing collections growth space until 2022. When the project is done, collections can grow until at least 2030.

National Cooperative Preservation

MedPrint is the National Network of Libraries of Medicine (NN/LM) cooperative project to preserve key biomedical journals in print until there is stronger evidence for the reliability of digital preservation. The program is open to all US libraries that participate in DOCLINE, the NLM interlibrary loan (ILL) system that stores journal holdings information for almost 2,500 libraries. Print retention commitments are also stored in DOCLINE. By the end of 2014, NLM had 21 signed agreements from institutions representing all eight regions. One hundred and one libraries have recorded print retention commitments for 1,376 titles.

Digitization Program

The NLM Digital Collections repository now holds over 12,000 monographs and serials and over 150 films, with newly digitized texts and films added regularly. NLM Digital Collections also ingested the approximately 3.8 million citations from the IndexCat Web site, making the contents of the Index Catalogue of the Surgeon General's Library more readily available. During the year, Digital Collections was modified to support ingest of serial publications, and the Web site was enhanced to provide a hierarchical display of each serial's digitized holdings.

The installation of CCS docWorks (dW) image processing software was a major enhancement to LO's digitization program, providing a more efficient scanning workflow, greater capabilities to crop and de-skew images, and the ability to analyze the structure and content of the digital surrogates resulting in enhanced structural metadata files for the digital books.

Preservation and Collection Management and History of Medicine staff completed digitization for several projects including an important collection of World War I 1914-1922 monographs. Combined with the ongoing digitization initiatives, including Medicine in the Americas Phase 2, NLM Publications, and the Scan on Demand program for interlibrary loan (ILL), a total of 2,284 volumes and 599,934 pages were digitized in FY2014.

PubMed Central (PMC), a digital archive of medical and life sciences journal literature developed by NCBI, is the NLM vehicle for ensuring permanent access to electronic journals and digitized back files. LO assists NCBI in soliciting participation of additional journals, particularly in the fields of clinical medicine, health policy, health services research, and public health. LO provides support for the PMC efforts ranging from review of potential journals for appropriateness for the NLM collection to cataloging and authority data creation for the PMC system. By the end of FY2014, 207 new journals had been added to PMC, and 368,111 new articles had been

NATIONAL LIBRARY OF MEDICINE

Programs and Services Fiscal Year 2014 (excerpts)

https://www.nlm.nih.gov/ocpl/anreports/fy2014.pdf

Table 1: Collections

Physical	***Total[1]***	***FY2014***	***FY2013***	***FY2012***
Monographs[2]				
Before 1500	598	1	0	0
1501-1600	6,058	2	3	0
1601-1700	10,347	1	3	0
1701-1800	272,741	3	3	4
1801-1870	256,788	71	27	37
1871-Present	886,034	13,560	11,292	13,287
Bound Serial Volumes[3]	1,480,296	15,806	12,650	17,025
Microforms[4]	606,126	42	8	10
Audiovisuals and Computer Software	95,356	2,395	1,701	1,310
Prints and Photographs	70,231	279	300	336
Manuscripts[5]	23,096,447	4,807,740	914,025	1,716,225
Withdrawn Items	(132,761)	(549)	(350)	(294)
Total items	**26,648,261**	**4,839,351**	**939,662**	**1,747,940**

Digital	***Total[1]***	**FY2014**	**FY2013**	***FY2012***
PubMed Central Articles	3,227,379	368,111	318,316	263,203
PubMed Central Titles[6]	1,600	207	244	252
Bookshelf Titles[7]	3,106	1,387	323	323
Digital Collections Repository[8]				
Texts[9]	12,201	2,642	2,580	5,075
Audiovisuals[10]	162	55	37	41

[1] Total: Numbers are cumulative as of the end of the fiscal year.

[2] Monographs: A bibliographic resource complete in one part or finite number of separate parts. Includes Americana, theses and pamphlets. Starting in FY2011 numbers for these materials are reported under monographs by publication year.

[3] Bound serial volumes: A serial is a continuing resource issued in separate parts with no predetermined conclusion. Bound serial volumes include serials bound, serials pamphlet bound and bound serial gifts.

[4] Microforms: Reduced size reproductions of monographs and serials including microfilm and microfiche.

[5] Manuscripts: Total manuscripts equivalent to 8,948 linear feet of material, multiplied by a common factor to provide an item number estimate.

[6] PMC Titles: Only fully deposited titles.

[7] Bookshelf Titles: Titles of books, reports, databases, documentation, and collections.

[8] Digital Collections Repository: Digitized content in the public domain. In the future will contain born digital items as well as reformatted items.

[9] Includes monographs and serials such as annual reports. Referred to as "Print Materials" on Digital Collections website.

[10] Referred to as "Films and Videos" on Digital Collections website.

Table 2: Collection Activities

Acquisitions and Processing	***FY2014***	***FY2013***	***FY2012***
Active Serial Subscriptions	17,439	18,343	19,184
Items Processed[11]			
Serial Pieces	94,738	99,891	101,294
Monographs (pre-1914)[12]	1,218	336	715
Monographs (1914-)	19,367	16,530	17,012
Audiovisuals[13]	241	683	1,335
Prints and Photographs	1,364	1,397	47,982
Total	134,367	137,180	168,338
Archival Materials Acquired			
Modern Manuscripts (in linear feet)	157	120	497
Expenditures			
Publications	$11,571,597	$11,033,522	$10,207,330
Rare Books, Manuscripts, and other Historical Materials	$299,841	$299,948	$299,584
Total[14]	$11,871,438	$11,333,470	$10,506,914
Preservation			
Volumes Bound	14,516	14,903	15,000
Volumes Repaired Onsite[15]	685	994	2,346
Audiovisuals Preserved	811	632	534
Historical Volumes Conserved	583	375	997
Pages Digitized[16]	413,550	540,830	643,372

[11] Items processed: Serial issues, monographs and nonprint receipts processed.
[12] Monographs (pre-1914) includes historical manuscripts (those written prior to the year 1600).
[13] Audiovisuals became a separate tracking category in FY2012. For prior year reports, Audiovisuals were grouped with Monographs (1914-).
[14] Used to be reported in "Publications" prior to FY2012 and "Rare Books" was a portion of the amount.
[15] Volumes repaired onsite: General Collection monographs and serials only.
[16] Number excludes digitization projects not associated with the Digital Collections Repository, e.g., Profiles in Science.

North Carolina State University is a land-grant university and a constituent institution of the University of North Carolina

NCSU Libraries
Campus Box 7111
Raleigh, NC 27695-7111

NC STATE UNIVERSITY

Vice Provost and Director of Libraries
919.515-7188 (phone)
919.515-3628 (fax)
http://www.lib.ncsu.edu

MEMORANDUM

TO: NC State Deans and Department Heads

FROM: Susan K. Nutter Susan K. Nutter
Vice Provost and Director of Libraries

SUBJECT: Collections Review and Journal Subscriptions

DATE: 14 February 2014

Under the guidance of the University Library Committee (ULC), and in consultation with the NC State community, the NCSU Libraries is preparing for reductions to the FY 2014/2015 collections budget. Cuts to the Libraries budget this year and continued price increases for journals and databases above standard inflation rates require a review of current collecting to identify up to $750,000—7.5% of the 2013/2014 collections budget allocation—in potential cuts. This review will include reductions to the book budget and a comprehensive review of all journal and database subscriptions.

The Libraries is working directly with Departmental Library Representatives (http://www.lib.ncsu.edu/sites/default/files/files/images/LibraryReps2013_11182013.pdf), which includes a faculty member from each department and a graduate student from departments offering advanced degree programs, and the University Library Committee (ULC), to disseminate the collections review site (https://www.lib.ncsu.edu/collections/collectionsreview2014) and broadly solicit feedback from faculty, staff, and students. Please work with your representatives, colleagues, students, and staff to ensure that your department's input is fully represented during the review process. As evidenced by the over 11 million uses of the collection this past year, the collection is at the center of what we do and is essential to research and teaching. Faculty, staff, and student input is crucial in making the best possible decisions related to the collection during this difficult period.

Staff from the Libraries met with Departmental Library Representatives and the ULC in the Fall to discuss the strategy for reviewing titles and a communication plan for soliciting feedback. The Departmental Library Representatives suggested, and strongly endorse, a data informed process where subject specialists from the Libraries review usage data, citation and publication activity at the university, disciplinary trends, price, and impact factor to compile a potential cancellation list for review by the NC State community. Per that recommendation, a list of potential journal cancellations is presented for review and feedback using an interactive, tiered input system at https://www.lib.ncsu.edu/collections/collectionsreview2014. The interactive review site includes the various data points, such as online usage, requested by the ULC and Departmental Library Representatives, along with options for filtering and sorting by subject.

Timeline and Feedback
The review process will include multiple opportunities for feedback and discussion. Initial rankings of titles posted for review by faculty, staff, and students are requested by March 21st. The web form includes a tiered ranking system that will enable the Libraries and the ULC to apply input from the review to evolving budget scenarios. Individuals and departments that use the tiered rankings for titles in their areas of teaching and research, rather than listing every title as critical, will have the most significant and beneficial impact on this process.

The Libraries will incorporate community feedback with the data points on usage, citation activity, impact factor, and cost, and, in consultation with the ULC and Departmental Library Representatives, will post a revised potential cancellation list by April 15th for follow-up review. The Libraries and ULC will post a final list of cancellations in early May and submit them to our vendors in August.

Background Information
Along with the title lists and feedback system, the Collections Review webpage (https://www.lib.ncsu.edu/collections/collectionsreview2014) contains extensive information on the process and timeline, background about the sources of data used in the review, and contact information for subject specialists in the Libraries. There is also an FAQ (http://www.lib.ncsu.edu/collections/collectionsreview2014/faq) available that addresses a number of potential questions about the review, including the Libraries' commitment to document delivery access for canceled titles and suggestions for scholars interested in learning more about the system of scholarly communication.

The Libraries is comprehensively reviewing its budget, making strategic, programmatic reductions, and has gone through a process of reductions in force and will be extending existing collaboration with our Triangle Research Libraries Network (www.trln.org) partners. We understand how central the collection is to research and teaching and are doing everything we can to limit the impact of budget cuts. However, because the collections budget is a large part of the Libraries' overall budget, we cannot avoid collections reductions in the face of significant cuts and annual price increases above the general rate of inflation. Thank you for your input into this process and please feel free to contact me with any questions or comments.

C: Warrick Arden, Provost and Executive Vice Chancellor
Terri Lomax, Vice Chancellor for Research
Alex Parker, Student Body President
Kelsey Mills, Student Senate President
Matthew Melillo, University Graduate Student Association President
University Library Committee

UNIVERSITY OF OREGON LIBRARIES

UO Libraries' Assessment Team

https://library.uoregon.edu/assessment/index.html

UNIVERSITY OF OREGON

UO Libraries

Search library website

My Library Accounts | Hours & Locations | Rooms & Study Spaces | Research Guides | About | Ask a Librarian | Live Chat

RESOURCE MANAGEMENT & ASSESSMENT

SERVICES

- Library Budget & Statistical Information

RELATED RESOURCES

- ARL Statistics & Assessment Program
- Oregon University System (OUS)
- UO Business Affairs portal
- UO Office of Institutional Research

UO Libraries' Assessment Team

Team Members:

- Nancy Slight-Gibney
- David C. Fowler
- Helen Chu
- Kirstin Hierholzer
- David Ketchum
- Damon Campbell

Library Information and Statistics:

- Library Quick Facts
- Statistical Abstract for Fiscal Year 2013-2014
- 2013 UO Libraries Year in Review
- Statiistical Abstract for Fiscal Year 2012-2013
- Statistical Abstract for Fiscal Year 2011-2012
- Statistical Abstract for Fiscal Year 2010-2011
- University of Oregon Libraries Annual Report, 2010-2011
- University of Oregon Libraries Annual Report, 2009-2010
- University of Oregon Libraries Annual Report, 2008-2009
- University of Oregon Libraries Annual Report, 2007-2008
- University of Oregon Libraries Annual Report, 2006-2007

User Surveys:

LibQual+: Every 4-5 years the University of Oregon Libraries participates in LibQual+, a national service quality survey sponsored by the Association of Research Libraries. The survey measures user satisfaction along three dimensions: library as place, affect of service, and information control. We last administered the survey in spring 2014. A summary of the results are linked here. Full access to the survey data is available upon request: nsg@uoregon.edu.

Focus Groups:

GRAD Connect: In January and February 2013 the Assessment Team conducted focus groups with graduate students to better understand their needs for support in their roles as students, teachers and researchers. Here is the Executive Summary report.

UNIVERSITY OF OREGON | Libraries

Statistical Abstract

Fiscal Year 2013–2014

UO Libraries Assessment Team
Nancy Slight-Gibney, David C. Fowler, Helen Chu, David Ketchum,
Kirstin Hierholzer, Damon Campbell

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University of Oregon Libraries

Architecture and Allied Arts Library

Global Scholars Hall Library Commons

John E. Jaqua Law Library

Knight Library
Center for Media and Educational Technologies
Digital Scholarship Center
Network Startup Resource Center
Special Collections and University Archives

Mathematics Library

Rippey Library, Oregon Institute of Marine Biology

Science Library

UO Portland Library and Learning Commons

UNIVERSITY OF OREGON LIBRARIES
Statistical Abstract, 2013–2014 (excerpts)
https://scholarsbank.uoregon.edu/xmlui/handle/1794/18807

Use of Library Collections and Services

Patron Use of Information Resources

Electronic Format		
Full-Text Article/Video/Map Downloads	$ 2,001,976	59%
E-Book Downloads	$ 642,068	19%
UO-produced Digital Collections (est. UO use)	$ 370,000	11%
	$ 3,014,044	**89%**
Print Format		
Print Circulation (inc. reserves)	$ 230,228	7%
In-house Use of Print	$ 85,000	2%
Items Borrowed from Other Libraries	$ 59,165	2%
	$ 374,393	**11%**

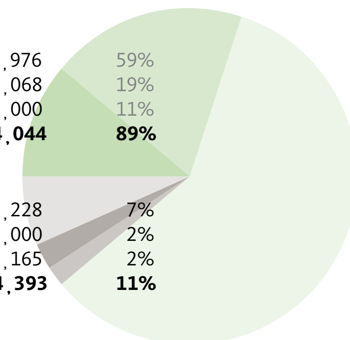

Fig. 14 Patron Use of Information Resources

A total of 89% of the use of library-provided content is in electronic format, a number that has stabilized over the last two to three years. Door counts are falling slightly, perhaps a reflection of new campus buildings with more study space.

Door Count — Typical Week in Fall Term

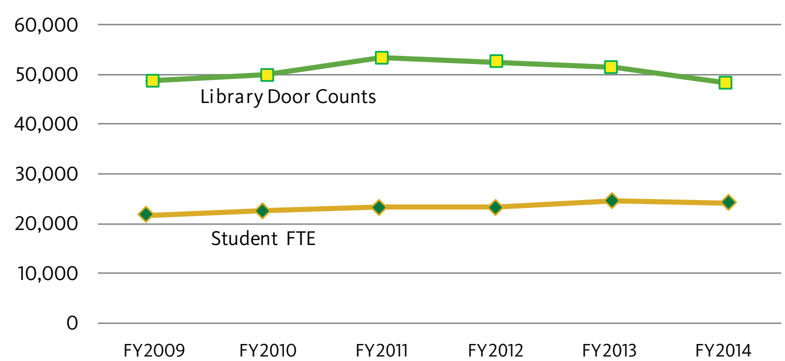

Fig. 15 Door Count

Collections and Services

	FY13 Change		% Change
Titles Held (various formats)	2,145,929	▲	0.8
Volumes held (including 285,341 ebooks)	3,245,882	▲	0.4
Orbis Cascade Alliance titles	9 million		N/A
Orbis Cascade Alliance items	29 million		N/A
Door count - typical week Fall Term 2013	51,382	▼	-1.9
Initial circulation (excluding reserves)	140,724	▼	-11.4
Reserves circulation	45,624	▼	-5.8
Total circulation (includes reserves and renewals)	230,228	▼	-9.0
Items borrowed from other libraries	59,165	▼	-5.1
Items loaned to other libraries (change in Summit algorithm)	66,526	▼	-1.0
Full-text articles/videos/maps retrieved from licensed resources	2,001,976	▲	0.2
Full-text e-books retrieved (some due to better accountability)	642,068	▲	47.1
Virtual visits to library website (library.uoregon.edu)	2,454,379	▲	15.6
Number of items in local digital collections (increased newspapers)	832,915	▲	15.9
Item views in local digital collections (increase from newspapers)	5,059,591	▲	14.9
Reference questions answered total	38,963	▼	-2.0
In person or by telephone	24,374	▼	-3.2
Virtual (e-mail, chat)	14,589	▲	0.2
Classroom instruction, presentations	845	▼	-26.4
Classroom instruction, participants (50% in group tours)	22,070	▼	34.4

Fig. 16 Collections and Services

Assessment: Learning From and About Library Users

Usability Studies/Assessing Learning Management System Options
The LMS review process is noted in detail later in this document. It included extensive pilot testing, surveys, focus groups, and usability testing.

Surveying User Satisfaction/LibQual+
The Assessment Team's major project for the last academic year was conducting the LibQual+ survey. The survey was previously conducted in 2005 and 2010. We had an overall response rate of just 7%, in spite of multiple reminder messages. (The response rate was 11% in 2010.) The faculty response rate was 9%, graduate students 15%, and undergraduates 5%. We conducted a representativeness check comparing respondents with the overall campus population by discipline.

In this round the perceived level of service improved slightly along all three major dimensions:

- Affect of Service (how users feel they are treated)
- Information Control (library collections, website, and discovery tools)
- Library as Place (physical facilities)

Additional findings are reported in the summary online at https://library.uoregon.edu/sites/default/files/node156/libqual_summary_report.docx, with the full report from the Association of Research Libraries in Scholars' Bank.

Perceived Level of Service LibQUAL+ Survey 2005–2014

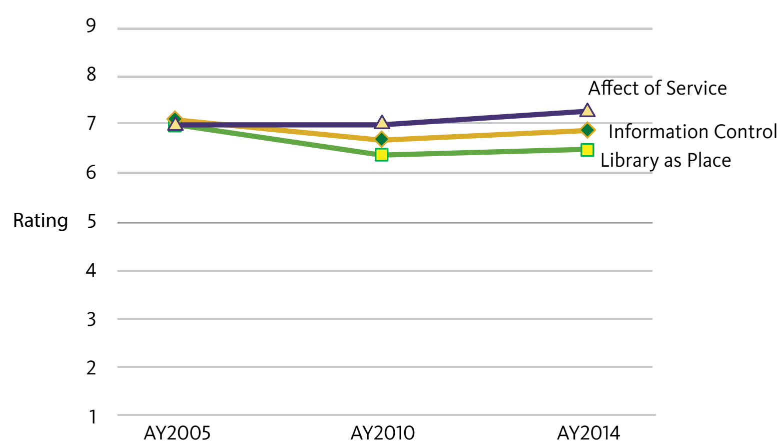

Fig. 23 Perceived Level of Service LibQUAL+ Survey 2005–2014

CFRRSC Communication Process

1. Semi-Annual Update to Librarians and Collection Groups

- CFRRSC will provide a semi-annual update to collection groups and affiliated university college libraries to communicate packages and products planned for renewal and review.
- Packages and products will be selected for review based on preliminary assessment that may include pricing or usage stats.
- Librarians may provide feedback to CFRRSC regarding the packages selected and will need to provide justification for any package they feel should be retained without further evaluation. Faculty consultation is not required at this point.

2. Communication to Affected Librarians and Collection Groups with Request for Faculty Feedback

- CFRRSC will communicate the results of a package or product analysis to the appropriate librarian(s), affiliated university college libraries, and collection groups, including the anticipated recommendation for the package and, if applicable, a list of recommended buy-back items and expected cancellations.
- Affected librarians and collection groups will be asked to communicate with faculty about the impending cancellation in order to receive feedback on the impact of lost or diminished content, address concerns, and confirm or adjust CFRRSC's list of buy-back items.
- Consultations with faculty will need to be completed within a specific timeframe in order to inform CFRRSC's final recommendation and IRSC's decision for approval before the renewal date.
- Librarians and collection groups will be asked to provide the faculty responses to CFRRSC to be considered and brought forward as part of the final CFRRSC recommendation to IRSC.

3. Final Communication

- If IRSC approves the cancellation, CFRRSC will communicate the final decision to all collections librarians and affiliated university college libraries. Librarians will then be responsible for communicating with faculty as appropriate.
- If IRSC does not approve the cancellation, CFRRSC will communicate this decision to the appropriate librarians, affiliated university college libraries and collection groups, and encourage them to inform their faculty of this change in decision.
- CFRRSC will upload final analysis (including lists of cancelled and buy-back titles, along with pricing, and primary and secondary justifications) and criteria checklist documentation to the CFRRSC K drive folder.

Serials Review Checklist Date: 03/28/2016

This checklist is intended to guide decisions regarding serial renewal or cancellation. The checklist can be used for any serial – e.g. journal, database, print, electronic, etc.

REQUIRED INFORMATION	
Name:	Springer E-books
Description:	Available through SpringerLink's IP-enabled eBook gateway libraries and corporations can offer their patrons online access to the most worthwhile books instantly from multiple locations, including library, office, home or wherever they are. Springer's eBook Collection uses the portability, searchability, and unparalleled ease of access of PDF and HTML data formats to make access for researchers, as convenient as possible. Springer eBook Collections offer accurate reproductions of high quality Springer print book publications, together with all the added benefits of an online environment, including exceptional search capabilities and bookmarks. The collection is available on the Springerlink and Scholars Portal interfaces with no DRM and perpetual ownership.
Price (original currency, CDN conversion):	$[redacted] CAD in 2015 $[redacted] (USD) quote in 2016
Library Responsibility (e.g. Centrally funded, Weldon, etc)	Centrally funded
In what format is the resource? Is this the best format?	Online
REQUIRED CRITERIA **Additional Details:**	
Usage data from all sources, eg. Scholars portal, publishers website, aggregator websites	610,175 chapter downloads* (2015) *For whole book downloads, Springer adds the total number of chapters to the overall usage count (e.g. if a book has 50 chapters and the book is downloaded, our usage will show 50 chapter downloads even if the user only accessed one chapter)
Price	$[redacted]
Cost per use Cost per use (3 year average)	$[redacted]
Percentage of package use	[redacted]%
Overlapping content/title overlap	N/A
Comparable content – similar subject coverage (databases)	N/A
User groups [e.g. multi-disciplinary areas] , status	Multi-disciplinary but with emphasis on STEM/specific subjects: Medicine BioMed Engineering Computer Science Math
Content: ☐ Full Text ☐ Abstracting ☐ Indexing ☒ Other	Full text e-books

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Platform/Interface	SpringerLink and Scholars Portal (local load)
SFX Compliant: ☒ Yes ☐ No	
OTHER CRITERIA **Additional Details:**	
Will we have post-cancellation access?	Yes. All previously purchased e-books will be available on the SpringerLink and Scholars Portal platforms
Impact factor and ranking position	N/A
Where is it indexed?	N/A
Who has requested it?	N/A
Other information / description	Lecture notes in Computer Science is considered a key resource for the Computer Science program, and Springer is making this series accessible exclusively through package deals. The Engineering Librarian has identified Springer titles as core resources to the discipline.
Strategic research areas	Medicine BioMed Engineering Computer Science Math
# Faculty publications in the journal	N/A
Reliability of platform	Strong
# of graduate students enrolled in program	Computer Science, 118 Engineering, 698
Which undergraduate and/or professional programs does the resource support?	N/A
Embargo Period? ☐ Yes ☒ No ☐ Explain nature/length of embargo period	No
Pricing Model: ☐ Annual Subscription ☒ One time purchase ☐ One time purchase + Annual Fee for ongoing access ☐ Other	The Springer E-book OCUL deal provides subscribing libraries ownership in perpetuity of most Springer e-books and e-book series published within the subscribing year (with the exception of certain imprints and series).
Other: Email communications:	

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March 16, 2016 (to collections library groups)

Dear Collections Colleagues,

CFRRSC has completed its analysis of the entire Springer 2016 E-book package, and has recommended to IRSC that Western Libraries purchase selected subject collections, rather than the entire package. Selected titles from Springer 2016 e-books subject collections can be acquired through immediate purchase or DDA access for the remainder of 2016.
IRSC has accepted CFRRSC's recommendations. The following points outline the rationale for individual subject collection purchases and/or DDA access:

- The 'Engineering' subject collection will be purchased at a cost of $[redacted] CDN. Engineering faculty and students rely heavily on Springer e-books, as indicated by 4965 uses in 2014 for titles published that year. The cost per use was $[redacted].
- The 'Computer Science' subject collection will be purchased at a cost of $[redacted] CDN. One series in this collection, 'Lecture Notes in Computer Science,' received over 5000 uses for 2015 publications. Unfortunately, this series cannot be purchased separately through Springer or Coutts as an e-book or DDA title. With such high usage, purchasing print copies would be unsatisfactory for users and prohibitively expensive.
- 'Biomedical and Life Sciences', 'Medicine', and the 6 other collections under Taylor were identified by subject librarians as low priority for these disciplines and will not be re-purchased or added to DDA. Librarians will have the option to purchase new e-book titles on request that do not belong to series, reference work, or text book collections.
- The e-books in 'Behavioral Science', 'Business & Economics', and 'Humanities, Social Science, and Law' will be made available through DDA. Again, librarians will be able to purchase new e-book titles on request that do not belong to series, reference work, or textbook collections, although print may be available.

The decision not to purchase the full Springer 2016 E-book collection will result in initial savings of $150,000 in our central serials budget. The cost to purchase 'Engineering' and 'Computer Science' collections is $[redacted]; the net savings to serials will be approximately $100,000. Going forward, individual title purchases for Springer 2016 E-book titles will be paid through DDA or subject monograph funds.

Please forward any questions or concerns to cfrrsc@uwo.ca

Courtney (on behalf of CFRRSC)

March 3, 2016 (to IRSC)

Hi IRSC Colleagues,

After additional consultations with Taylor librarians, and taking into account Springer's reluctance to offer their major series, textbooks and reference works as purchasable, individual e-books, CFRRSC proposes the following changes to the buy-back recommendation. Please note that CFRRSC's overall recommendation to not purchase the Springer eBook package has not changed.

- The 'Engineering' subject collection will be purchased at a cost of $[redacted]. Engineering faculty and students rely on Springer eBooks, as indicated by 4956 uses in 2014 for titles published that year with a cost/use of $[redacted]
- The 'Computer Science' subject collection will be purchased at a cost of $[redacted]. One series in this collection, 'Lecture Notes in Computer Science,' received over 5000 uses for 2015 publications. Unfortunately, this series cannot be purchased separately through Springer or Coutts as an eBook or DDA title. With such high usage, purchasing print copies will be unsatisfactory for users and prohibitively expensive
- 'BioMedical and Life Sciences', 'Medicine', and the other 6 collections under Taylor will not be purchased nor added to DDA. These collections were deemed not a priority for these disciplines. Instead, librarians will purchase new titles by request. Librarians will not be able to individually select e-books belonging to series, reference work or textbook collections.
- Taylor librarians do not anticipate a significant number of requests because most faculty are journal-focused and they will continue to have access to titles from previous years through perpetual access
- The eBooks in 'Behavioural Science', 'Business & Economics', and 'Humanities, Social Sciences and Law' will be made available through DDA. Again, librarians will not be able to individually

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select e-books belonging to series, reference work or textbook collections, although print will be available.
- As a result, the DDA budget will remain in a more sustainable position with the additional of titles from only 3 Springer collections

The decision not to purchase the full collection for 2016 will result in a savings of ~$150,000 in our central serials budget. The cost to purchase the 'Engineering' and 'Computer Science' collections is $[redacted]. Our net savings for serials will be ~$100,000. Going forward, individual title purchases will be paid from monograph funds (either DDA or subject funds). The deadline for feedback is still March 4.

Special thanks to Shawn and Debbie from Taylor for finding additional savings and revising this recommendation in short order.

Thanks,

Samuel (on behalf of CFRRSC)

February 24, 2016 (to IRSC)

Dear IRSC Colleagues,

This message contains important information about the cancellation of the Springer E-book package. The deadline for responses is March 4, 2016.

CFRRSC has completed the analysis of the Springer E-book package and is making a recommendation to cancel this product and buy back selected individual subject collections, based on the following evidence:

- Springer usage statistics are flawed and inflated, as Springer only provides full text section requests (BR2 data) and counts all title sections for each title downloaded (e.g. if a title is downloaded once, and the title has 20 chapters, Springer counts this as 20 uses)
- Springer usage statistics show that purchasing the 'BioMedical and Life Sciences,' 'Engineering' and 'Medicine' subject collections would result in a savings of 75k versus purchasing those used titles via DDA
- The projected cost of acquiring all other titles via DDA (87k) plus the 3 subject collections (76k) would not be significantly higher than the total cost of the Springer E-book package (162k vs 161k, respectively)
- Considering the inflated usage statistics, the projected worst case scenario of relying on DDA would only result in a similar cost to the total package cost, carrying the potential upside of additional savings (due to the flawed/inflated Springer stats)
- DDA can be disabled at any point in time
- Ryerson took a calculated risk in 2014 and cancelled the Springer E-book package, saving 2/3 of the package cost

The takeaway from this analysis is that, because acquiring e-books via DDA provides cost containment flexibility, and other Universities are finding significant savings by opting out of the Springer deal, Western would be waging very little risk to potentially realize great savings by making this cancellation. Users should not be significantly impacted, as access to 2016 titles will still be available via aggregate DDA platforms (e.g. EBL). Previously purchased Springer titles will still be available via the Springer platform and Scholars Portal.

Attached are various cost scenarios in addition to pricing files provided by OCUL. Note that all pricing is confidential to Western.
Please forward any questions or concerns to cfrrsc@uwo.ca, and **indicate if you support this recommendation to irsc@uwo.ca by March 4, 2016**.

Thanks,

Samuel (on behalf of CFRRSC)

YALE UNIVERSITY LIBRARY
2015 Charleston Conference presentation (excerpts)
http://www.slideshare.net/DanielDollar/collections-as-a-service

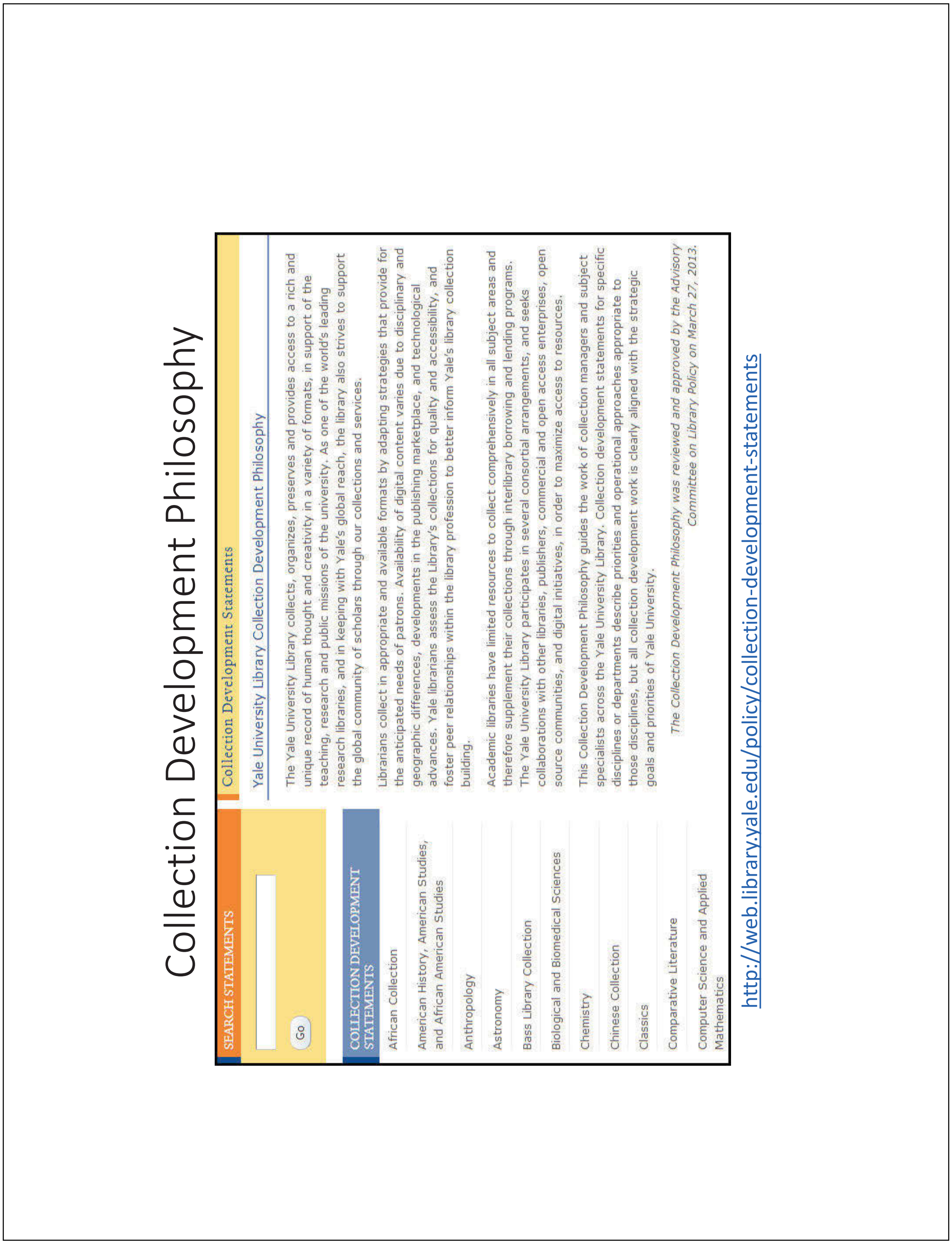
Collections are a service

Charleston Conference, 2015

Daniel Dollar
Director of Collection Development
Yale University Library
November 6, 2015

2015 Charleston Conference presentation (excerpts)

http://www.slideshare.net/DanielDollar/collections-as-a-service



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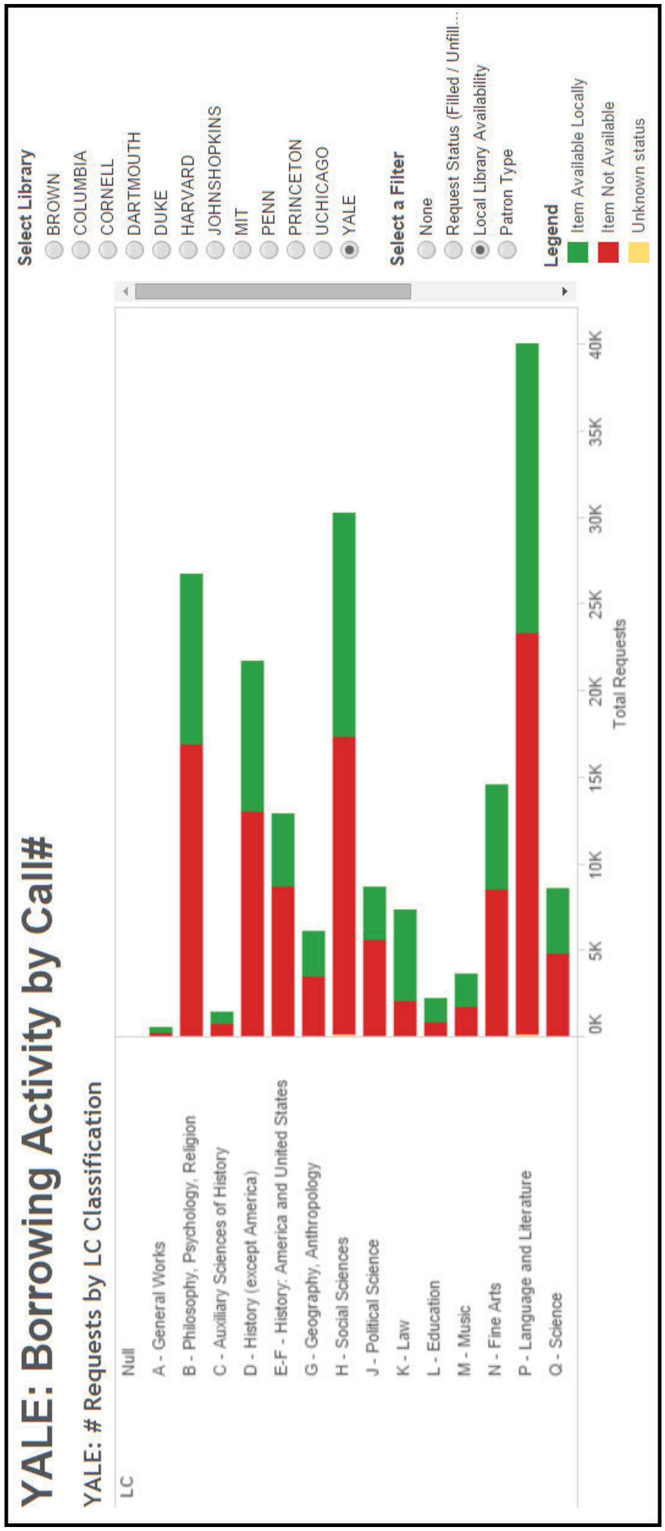

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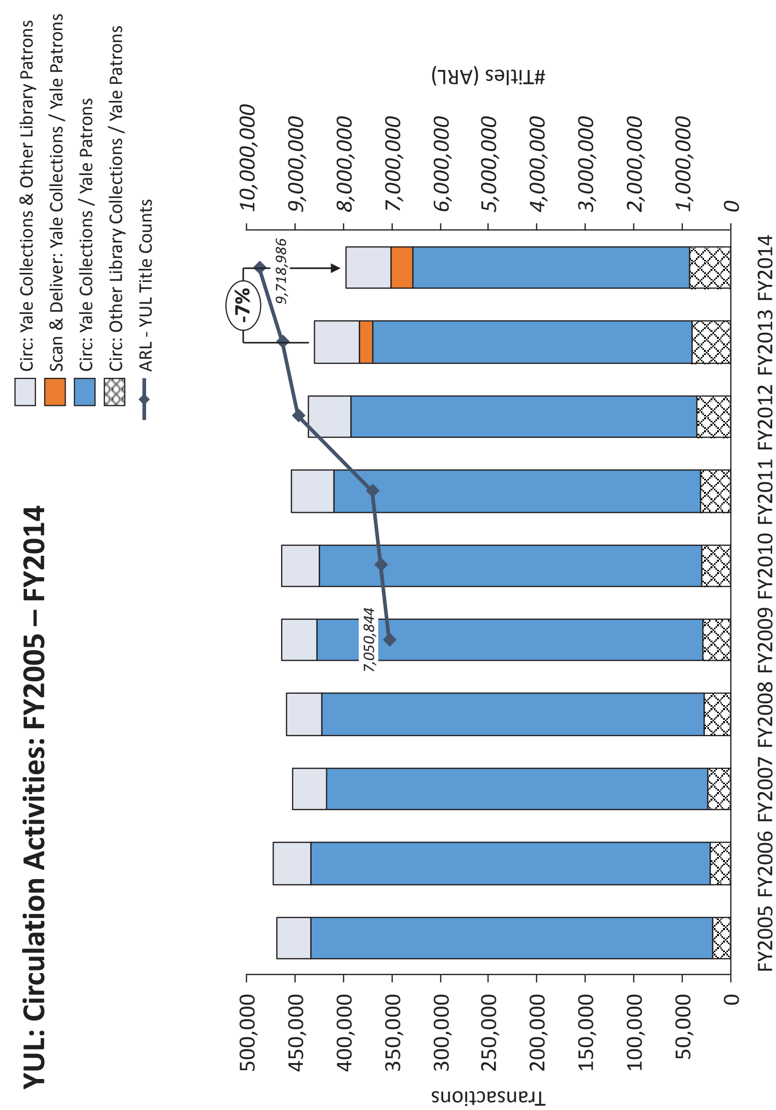

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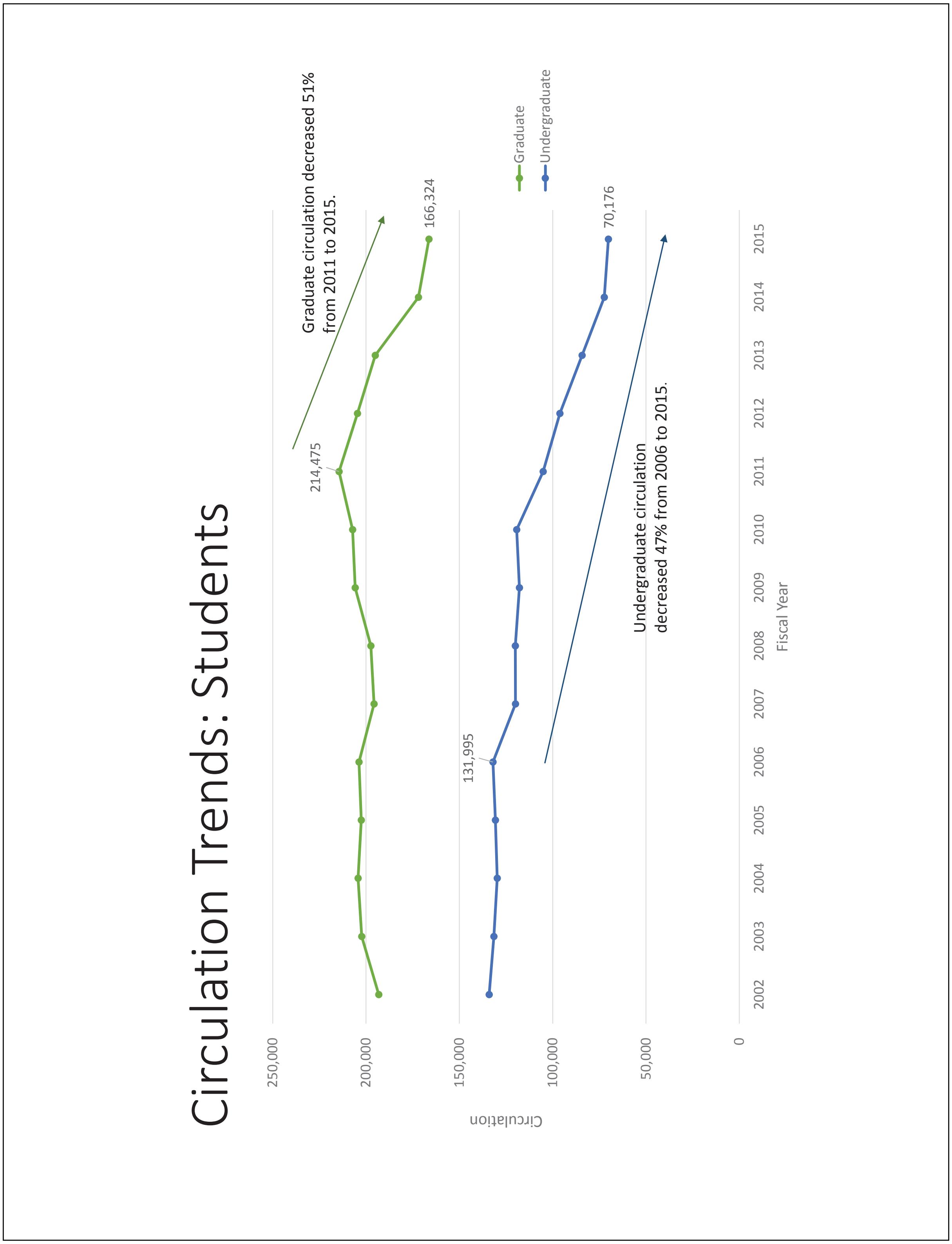

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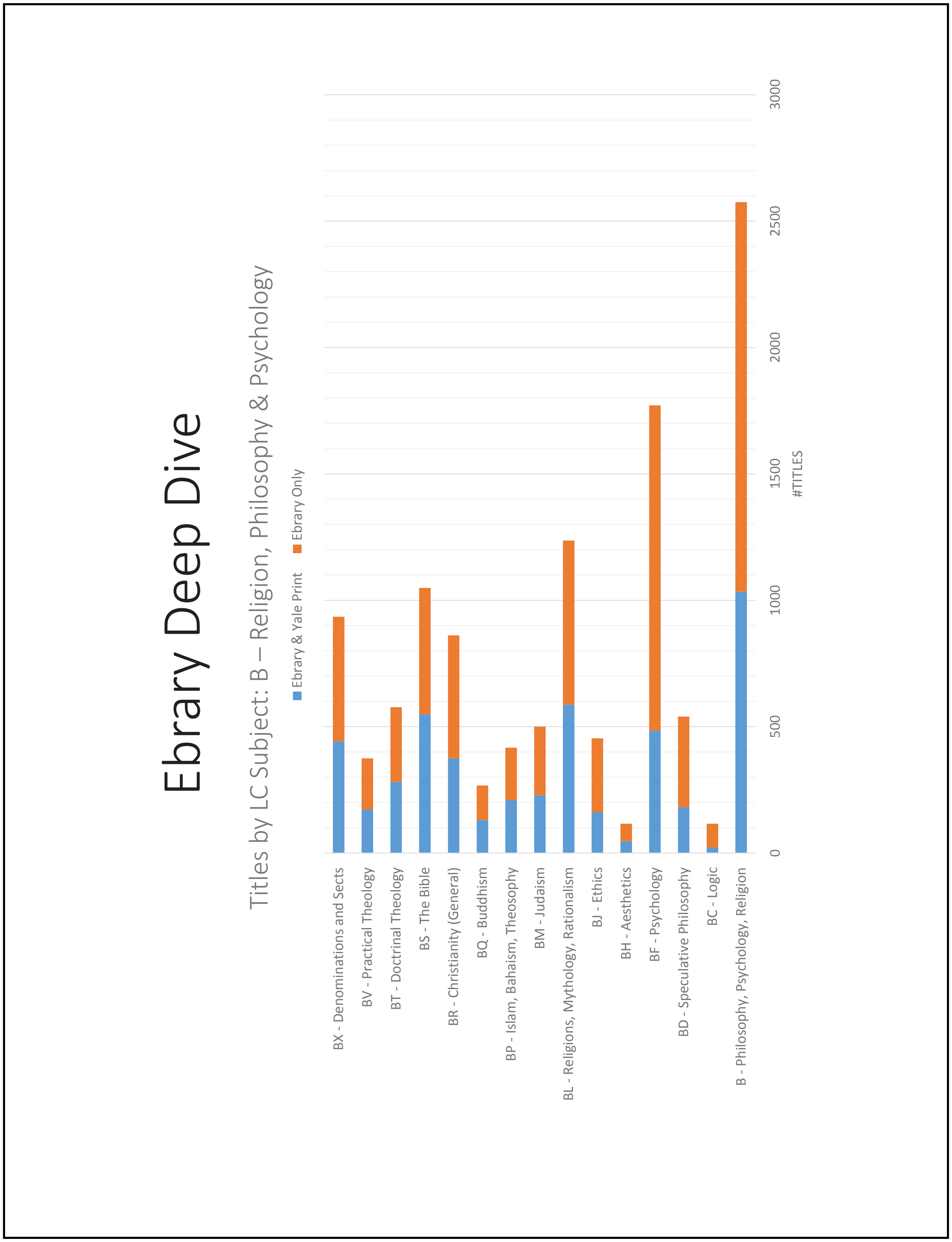

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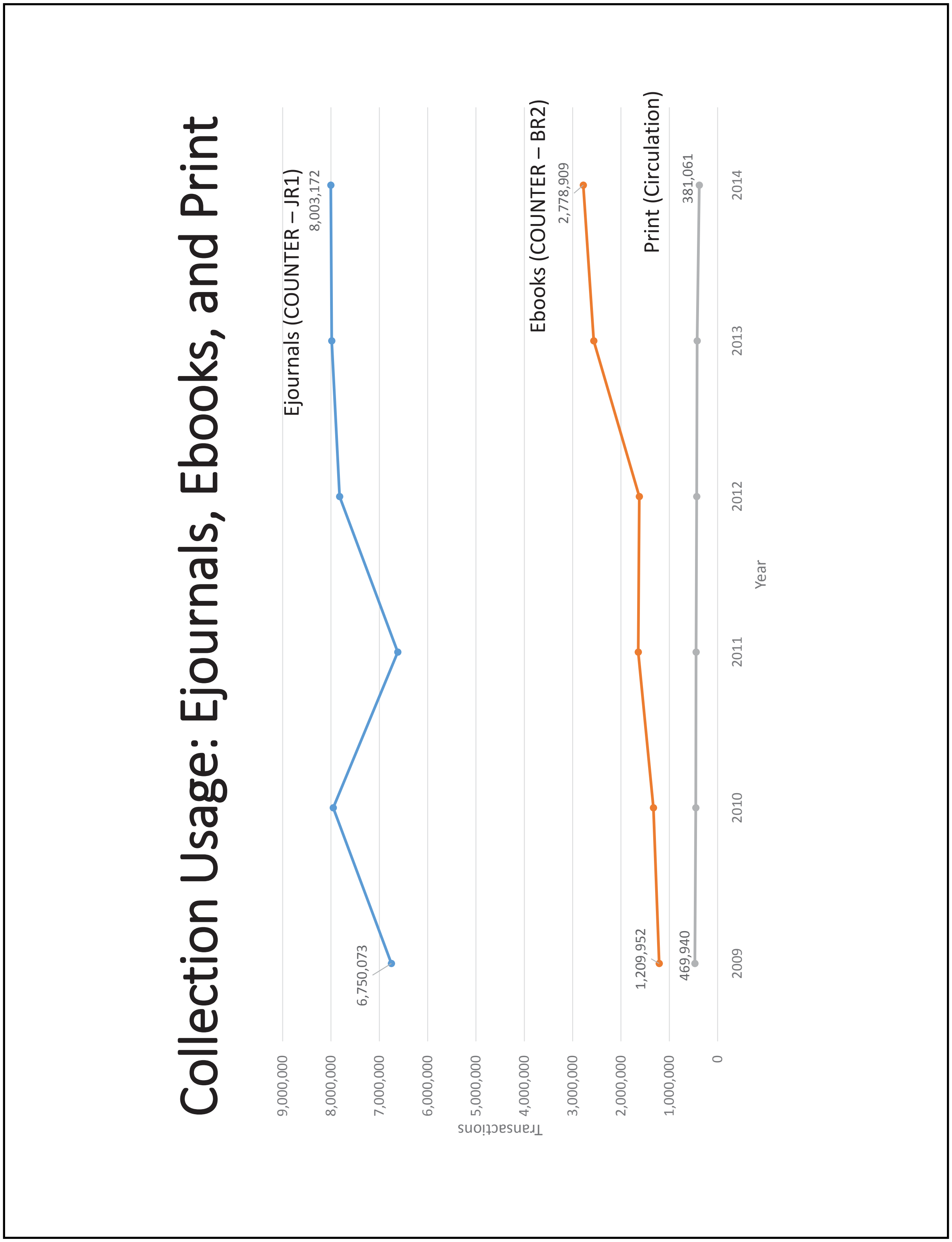

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