


DEVELOPING A SUSTAINABLE COLLECTION STRATEGY



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COLLECTION PROFILE TEMPLATE

Subject Discipline:

Librarian/Curator:

Budget:

Endowments

Grant activities

Description of Collection:

Size

Call number range

Scope

Years

Related subjects

Online/Print

Approval/Standing

Just in Time/Case

Strengths/Weaknesses

Peer libraries



COLLECTION ASSESSMENT TEMPLATE

- Usage & circulation
 - # of print by firm order
 - # of print by approval
 - Funds expended

- Usage & cost per use
 - # of e-books
 - # of e-journals by package or membership
 - # of streaming video
 - # of databases

- Usage per title: of OA/OER
 - # of e-books
 - # online journals





SIMPLIFIED CHECKLIST

Phase 1

- a) College/Department to support
- b) Number of Faculty
- c) Number & Type of Students
- d) Number & Type of Researchers

Define collection & budget profiles

Phase 2

- a) Summary statement / collection goals
- b) Call number ranges / related subject areas
- c) Budgets for monos/serials/other resources
- d) Number of monos/serials/other resources
- e) Resources received annually via:
 - i. *Multidisciplinary packages & databases*
 - ii. *Open Access / OER*
 - iii. *Memberships (e.g. HathiTrust)*

Phase 3

Conduct quantitative analysis

- a) Circulation and usage stats
- c) Cost-effectiveness studies (e.g. cost per use)
- d) Open Access/OER usage

Phase 4

Conduct qualitative analysis

- a) User surveys / interviews
- c) Use studies

Phase 5

Revise parameters / fund management

- a) Set new objectives / reallocate budgets
- c) Revise approval plan/DDA profiles
- e) Prioritize databases/resources & wishlists

Phase 6

Communicate to stakeholders

- a) Know your audience - tailor the message
 - i. *Library colleagues*
 - ii. *College/university faculty and deans*

SIMPLIFIED CHECKLIST = 6 PHASES OF ASSESSMENT

- ① Define users**
- ② Define collections & budget**
- ③ Conduct quantitative analysis**
- ④ Conduct qualitative analysis**
- ⑤ Revise parameters/budget**
- ⑥ Communicate to stakeholders**



PHASE 1: IDENTIFY USERS

- ① What is your mission for service?
- ② Define your user base
- ③ Determine user needs

An underwater photograph of a coral reef. The scene is dimly lit, with a blue-green tint. In the foreground, there are large, dark, rounded rocks. To the right, a vibrant coral reef is visible, featuring various types of coral in shades of red, orange, and yellow. The background shows more of the reef structure and some smaller fish swimming in the water.

PHASE 2: DEFINE COLLECTIONS & BUDGETS

- ① Analyze collections: physical & online
- ② Determine budget and allocations
- ③ Techniques & Tools: OA/OER; social impact; vendor reports; Google Analytics

PHASE 3: QUANTITATIVE ANALYSIS

- ① Generate usage and circulation reports
- ② Determine budgets spent on collection by format
- ③ Review cost per use and other metrics
- ④ Compile lists of resources rec'd from memberships, approval/DDA plans
- ⑤ Develop method for analyzing OA/OER resources




PHASE 4: QUALITATIVE ANALYSIS



① User surveys

② Face to face interviews

PHASE 5: REVISE COLLECTION PARAMETERS / BUDGETS

- 
- ① Re-allocate budgets
 - ② Revise approval / DDA plans
 - ③ Cancel underused/non-used journals
 - ④ Prioritize resources – develop wishlists

PHASE 6: COMMUNICATE TO STAKEHOLDERS

- ① Know your audience
- ② Marketing vs P.R.
- ③ Tell a story



KNOW YOUR AUDIENCE

□ **Colleagues:**

- **Lots of story, lots of info**
- **Less background/definitions/explanation**
- **More time on new information and what it means**

□ **Library Administrators:**

- **More story, more data with explanation of key points**
- **Comparisons of similar institutions**

□ **Institution Administrators:**

- **Overview, simpler story**
- **Comparison of similar institutions**
- **Creating a scaffold for more advanced understanding**

TELL YOUR ASSESSMENT STORY: WHAT, HOW, WHY, NEXT



- ① Be accurate
- ② Be clear
- ③ Be concise

TAKEAWAYS:

- ❑ Use a template or checklist so data collection are consistent.
- ❑ Qualitative/quantitative assessments are challenging and time consuming.
- ❑ Studies currently suggest that OA/OER resources serve as a compliment to subscriptions. Not all disciplines are OA/OER heavy.
- ❑ Understand the components of how to communicate the “who, what, how, when”.

IMAGE CREDITS: CREATIVE COMMONS

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