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Creating a Framework for Comprehensive Collection Assessment

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Creating a Framework for Comprehensive Collection Assessment

This recipe outlines the objectives, project management framework, and deliverables created by the University of Connecticut's Electronic Resource Services Unit to enable a comprehensive review and assessment of the library's e-resources.

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NUTRITION INFORMATION

The purpose of the Comprehensive Collection Assessment Framework was: first, to create a system to collect and disseminate e-resource collection data that facilitated the timely renewal/cancellation and assessment of all e-collections; and second, to provide library staff who have collection development responsibilities with the information necessary to complete a data-informed review of collections and implement annual reviews of e-resources.

DIETARY STANDARDS

ACRL Standards for Libraries in Higher Education (2011) Principle 5; Principle 2, Indicator 2.5

COOKING TIME

160.75 hours (≈ 51 journal packages, 650 individual journal subscriptions, and 250 databases)

COOKING TECHNIQUE

Scrum, commonly used in software development, is a project management methodology that we used to streamline data collection and preparation as a framework for completing this recipe.

The E-Resources Services Unit used Scrum to keep the project on task and gain aptitude at breaking each element of the project into reasonable, doable tasks. Scrum simplified time prediction for various tasks, tracked time expended on the project, and distributed tasks equitably, all of which increased team members' morale. In addition, using this methodology strengthened the project's deliverables.

INGREDIENTS

Glossary of Terms

To ensure that collection reviewers understand common descriptive terms and that such terms are used consistently, develop and distribute a glossary of e-resource terms.

Journal Package Overview Guide

A master list of all journal packages that includes applicable information such as: Publisher/Provider, Package Name, Annual Cost, Sum of Most Recent Full Calendar Year of Usage for all Journals in Package (e.g., JR1), Cost Per Use, Usage Notes, Approximate Number of Titles Accessible, Current Subscription Type (e.g., All or Nothing Package or Title by Title Package), Access Model, Perpetual Access, Consortia, Annual

% Increase/Price Cap, License Expiration, Required Notification Period for Cancellation, Transfer/New Title Options/Title Swaps, Cancellation Allowance, Payee/Coast Share, and Notes.

Resource Profiles

For our comprehensive review, we developed fifty-three resource profiles: one for each journal package that listed all individual journals in a package, one for databases, and one for individual journal subscriptions.

Ingredients for each resource profile varied depending on the resource type. For example: resource name, past and current cost, annual percent increase, usage from the most recent calendar year, cost per use, perpetual access, consortia acquisition if applicable, license expiration, notification period for cancellation, payee, cost share, list price, alternate access (e.g., aggregate databases), and overlap analysis. Journal package resource profiles included all elements from the Journal Package Overview Guide plus subscribed titles and usage by title.

THE ASSESSMENT

Cooks are library staff with access to and familiarity with data used in the resource

profiles as well as Microsoft Excel and Access skills.

Using the Scrum project management framework, develop a glossary of terms pertinent to the e-resource collections being reviewed, a journal package overview guide, and a resource profile document (e.g., Excel file) that includes a list of resources and appropriate ingredients for databases, individually subscribed journals, and journal packages.

For journal packages, we imported usage reports, entitlement lists, and prices lists into Access and then merged data based on ISSN into a single query. The container or format for each deliverable is determined by an assessment of skill sets and tools readily available (e.g., Excel, Access, etc.), ease of user, and end user needs.

ALLERGY WARNINGS

Data preparation (e.g., usage reports with print ISSNs and entitlement lists with eISSNs) is very time-consuming, but necessary in order to merge usage, entitlement, and price lists into one file.

When creating an Access query, it is necessary to adjust the join properties between tables so that all data is included from a list, even if there is not an ISSN match in one of the other lists. Also, usage reports often list usage for unsubscribed titles due to trials, open access, etc.

CHEF'S NOTE

Data for each resource are often in various disparate sources. Developing this framework is *extremely* time-intensive; however, the resulting deliverables enable a library to systematically and holistically review and assess their collections.

RESOURCES

Chilton, Galadriel, and Chenwei Zhao. *E-Journal Subscriptions: Glossary of Terms*, 2015. <http://www.slideshare.net/gchilton/e-journals-glossary-of-terms-july-2015>

Sims, Chris, and Hillary Louise Johnson. *Scrum: A Breathtakingly Brief and Agile Introduction*. Foster City, Calif.: Dymaxicon, 2012.