A Scalable Model for Monograph Assessment: A Case Study at Musselman Library

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A Scalable Model for Monograph Assessment: A Case Study at Musselman Library

Abstract
The evolution of monograph assessment in Musselman Library resulted in a model that sustains concurrent assessment initiatives large and small, as well as time-bound and ongoing, with the purpose of shaping collections in support of the academic and creative interests at Gettysburg College. This presentation outlines the design of the 2012 assessment model that has become the foundation for assessing our circulating monograph collection, along with how the original model has been adjusted to assess more focused targets and larger initiatives, each with rapidly approaching deadlines. Finally, this presentation summarizes the workflows needed to support continuous decision making and provides a sample of the results from the assessment initiatives described.

Keywords
Academic Libraries, Collection Assessment, Collection Mapping, Monographs, Collection Evaluation

Disciplines
Collection Development and Management | Library and Information Science

Comments

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A Scalable Model for Monograph Assessment: A Case Study at Musselman Library

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Director of Technical Services

CPC Assessment Workshop
March 24th, 2016
Meet Musselman Library
Musselman Library’s Assessment History

- 4 waves of books moved
- Outdated formats
- Print serials and Electronic Resources
- 98% Full in 2007
  - MusstAssess
  - Muss2Knouse
  - The Great Unread
Can we develop and implement a sustainable collection assessment process of our print monographs that would combine data-driven decisions with liaison input?
New Models

• Collection Mapping Model (2012)
  ✓ Ongoing
  ✓ Small chunks
  ✓ All Subject Liaisons

• Knouse Assessment Model (2014)
  ✓ Time-Bound
  ✓ Larger Lists
  ✓ All Subject Liaisons
1. Identify and provide a range-level data
Range-Level Data Examples
Range-Level Data Examples

1589 items
After 1992
57%

1196 items
Before 1992
43%
Collection Mapping Model: The Design

1. Identify and provide a range-level data
2. Apply automatic keep criteria
Automatic Keep Criteria

- Recently purchased title within the last 8 years
- Not superseded by a newer edition [Policy]
- Circulated in the last academic year
- Circulated within the last 8 years
- Anything that has been on Reserve within the last 8 years
  - RCL Web title
  - Included in a subject specific core title list
  - Significant author – author has 10 or more titles in catalog
- Topic with high circulation statistics (20+)
  - Current Faculty members
Automatic Keep Criteria

- Assessed based on Keep Criteria: 1678 (56%)
- Remaining for Liaison: 1340 (43%)
Collection Mapping Model: The Design

1. Identify and provide a range-level data
2. Apply automatic keep criteria
3. Meet with Liaison to determine focus of assessment
4. Small carts of items are pulled and title-level data is captured on an assessment flag
5. Liaison decisions are captured on assessment flags
6. Carts are returned to Technical Services and a new cart is delivered to the liaison
Liaison Decision Time

**ASSESSMENT**
*Research Slip*

Forwarded to: ____________________________
Liaison on: ____________
Total usage: ____________
Last checked out: ____________

Do we have another copy of this book? YES / NO
If so, circle: Same edition, Different edition

Included in RLGWeb? YES / NO
Worldcat holdings = _____ libraries
Replacement cost:
    New: ________ Used: ________
Newer edition? YES / NO Cost: ________
Total books by this author in library? ________
Included in HathiTrust? YES / NO / n/a

**Liaison Use**

- This book is still needed.
  - [ ] Keep in stacks
  - [ ] Send to remote storage
- This book isn't needed now. Withdraw.
  - [ ] This edition's outdated but the topic is still important. Let's order a new edition.
  - [ ] Consider for Special Collections
    - If rejected by SC: Remote storage? Or Withdraw? [Circle one]

Initials: ________

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Gettysburg College
The Results

- Started with 2,785 titles in JK

```
<table>
<thead>
<tr>
<th>Category</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Goners</td>
<td>497</td>
</tr>
<tr>
<td>Total Keepers</td>
<td>2,288</td>
</tr>
<tr>
<td>Auto Criteria</td>
<td>1,678</td>
</tr>
<tr>
<td>New Titles added</td>
<td>451</td>
</tr>
<tr>
<td>Liaison Decision</td>
<td>159</td>
</tr>
</tbody>
</table>
```

Legend:
- Red: Total Goners
- Teal: Total Keepers
- Orange: Auto Criteria
- Purple: New Titles added
- Blue: Liaison Decision
Knouse Assessment Model: The Design

1. Limited title-level data is collected via ILS
2. Spreadsheets provided to each liaison
3. Liaisons schedule 2 hours/week for 12 weeks each summer
4. Items are flagged to indicate liaison decisions
5. Items are pulled and funneled through the assessment workflows that corresponds with each colored flag
The Results

- 31.5K items to start
  - Assessed 66%
  - Reduced the total number of items by 34%

- 2 Summers
  - 23 weeks
  - 46 hours/liaison
  - 644 hours total
Current Initiative

Collection Mapping Model

+  

Knouse Assessment Model

=  

Assessment 2.0
Assessment 2.0: The Goal

- Assessment 2.0 (2016)
  - Time-bound: Spring 2018
  - 40K in 2.5 years
  - Staggering Subject Liaisons
- Assessment 2.0 (2016)
  - Time-bound to each semester
  - 8K per semester
  - Staggering Subject Liaisons
Assessment 2.0 Model: The Design

1. Looked a range-level data for our circulating collection
2. Limited title-level data is collected via ILS
3. Meet with Liaison to present targets and timeline
4. Spreadsheets provided to each liaison
5. Liaisons schedule their own time
6. Items are flagged to indicate liaison decisions; or,
7. Liaisons record decisions on the spreadsheet
8. Items are pulled and funneled through the assessment workflows that corresponds with each colored flag
Assessment 2.0 Model: In the Stacks
The Results
What did we learn?

• It’s not just about weeding, stop saying that!
• Both models are applicable across whole collection
• Both models require staffing from multiple departments
• Use processes already in place
• Insert mini-assessments that evaluate the efficiency and effectiveness of the processes
• We know our collection better today than yesterday
• We are discovering amazing treasures and total duds
• Space is still a concern, but you can move beyond crisis
• Communication throughout the process
• Just do it, really.
Thank you.

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Bibliography


Bibliography


