E-Resource Assessment: *Flexible, Transparent, and Sustainable Strategies*

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Learning Outcomes

1. Create a plan for assessing electronic resources which is both manageable and sustainable that includes resource prioritization, timelines, and tools for your institution.
2. Verbalize relevant and directed questions about current data collection practices and communication processes at your own workplaces.
3. Identify interested parties with which to engage in discussion and decision-making to increase process transparency and enhance feedback.

Webinar Agenda

01
Background and Context

02
Assessment Schedule

03
Future Work

04
Questions and Discussion

What is Collection Assessment?

- The purpose of collection assessment is **to ensure that the library's collection meets the current needs of the community by providing reliable, up-to-date, and attractive materials and other information sources**.

- Types of collection assessment projects: weeding, shifting collections, deciding on new purchases, renewals, cancellations, audit of current collection (age, subject concentrations, DEI-related), peer comparison, and more!

Getting Started from Anywhere

Varying experiences with Collection Assessment in Libraries- reflective of the norm?

My reality as a technical services librarian = 0 -100

Importance of starting: build confidence and increase trust for library staff

140+

Monthly Renewals (databases, journals, tools)

1,000+

Annual Reviews (journals and small packages)

1,600+

Price Increases, Publisher Changes, Deals & Offers

Necessary Prework

01

Establishing Responsibilities

PDs, student workers/interns, training opportunities

02

Creating a Cohort

Inter-departmental group, diverse range of perspectives and expertise

03

Plan for Gathering Data

What tools/methods do we have for data gathering?

04

Sharing Information

Methods for sharing information, gathering feedback and timelines

02

Responsibilities and Expectations

Laying the Groundwork

- The goal is *not* to create more or extra work
- If collection (e-resource) assessment is a priority, then work needs to be re-prioritized
- Some work could be assigned to student workers or interns (if they have access to the necessary systems)
- Good opportunity for cross-departmental training or understanding

Integrating Assessment

- **People**
  - **Systems**
    - Create assessment calendar and title info from ILS
    - Determine discoverability and accessibility of resources
  - **Processes**
    - Harvesting COUNTER stats, contacting vendors
    - Soliciting feedback and sharing information

03

Gathering Data and Tools

Both qualitative *and* quantitative

E-Resource Usage Data

When consulting COUNTER data, consistency across resources is key

- Total number of downloads, full-text views/ abstract, TOC, reference views
- Total number of content items viewed/ amount of different content items viewed
- Search activity on a certain database or platform
- Looking to upgrade, add, or swap? – Turnaway data!

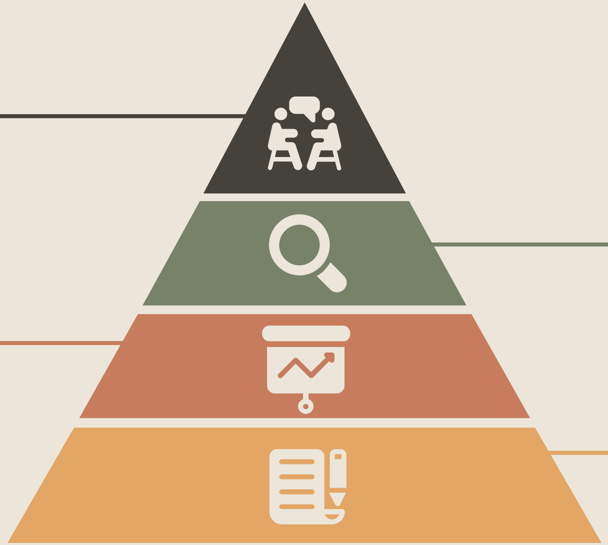
How to get COUNTER data:

- ILS
- Systems like LibApps
- Vendor admin website
- Vendor contact
- DIY

When assessing OA resources, or those from small or independent publishers

- Vendor/publisher contact
- Discovery system or website data
- Linking resources such as LibKey, Article Galaxy Scholar

Creating an Assessment Schedule



4. Discussion

Data gatherers and executive decision-makers

3. Resource Data

Accessibility, discoverability, overlap data

2. Usage Data

COUNTER statistics pulled from vendor, ILS, other. Vendor contacts or data from discovery layer

1. Resource List

Based on renewal dates or budget priorities

04

Feedback Messaging and Methods

Sharing and Feedback Methods

Internal

- Email message with timeline for feedback
- Link to share spreadsheet with data
- Consider sharing with public-facing staff, keepers of LibGuides, those who promote resources, subject specialists

External

- Town hall/forum
- Comprehensive or targeted email
- Page on website or LibGuide
- Survey portal
- Consider timelines and disruption of access
- Balance and transparency are both important!

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Example Assessment Calendar

Monthly and Yearly Reviews

Example Timeline

	Monthly and Yearly Reviews		
Quarter 01	Jan – compile list	Feb – check list accuracy	Mar – gather usage data
Quarter 02	Apr – share data with internal group	May – get feedback from library	Jun – share data with institution
Quarter 03	Jul – gather feedback	Aug – incorporate feedback	Sep – communicate with vendors
Quarter 04	Oct – share cancellation details	Nov – debrief on process	Dec – revise analytics

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Potential Issues

Common Stumbling Blocks

- Gathering and organizing past data
- Setting up and upkeeping SUSHI harvesting for COUNTER data
- Accessing admin sites
- Inconsistencies in vendor supplied data and contacts
- Garnering interest
- Setting feedback expectations with the library and larger institution

Future Work

Adjusting timeline for monthly reviews
New survey portal for feedback
Integrating open procedures
Ebook assessment

Questions?

Thanks!

Do you have any additional questions?
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Resources

- COUNTER Guide for Librarians: www.projectcounter.org/wp-content/uploads/2018/03/Release5_Librarians_PDFX_20180307.pdf
- Collections LibGuide Example: https://guides.library.oregonstate.edu/collection_development/renewals
- Organizing for Open Scholarship White Paper: https://ir.library.oregonstate.edu/concern/technical_reports/z890s312t

Alma Analytics

- Alma Analytics for SUSHI Links:
  - SUSHI Vendor Check (is there a complaint vendor that we don't have enabled?)
    - Criteria – vendor name, has corresponding SUSHI account in CZ but not in institution, Portfolio
    - Filters – has corresponding SUSHI account.. = Yes
  - Outdated SUSHI Links Check (where are our links out of date, and which reports are being pulled currently?)
    - Criteria – vendor code, load file status, load file upload method, load file counter report type, load file SUSHI account, load file Counter release