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

Taylor Ralph (she/her)
Collection Assessment Librarian
Oregon State University
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

Creating a Cohort
Inter-departmental group, diverse range of perspectives and expertise

Establishing Responsibilities
PDs, student workers/interns, training opportunities

Plan for Gathering Data
What tools/methods do we have for data gathering?

Sharing Information
Methods for sharing information, gathering feedback and timelines
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
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

1. Resource List
   - Based on renewal dates or budget priorities

2. Usage Data
   - COUNTER statistics pulled from vendor, ILS, other. Vendor contacts or data from discovery layer

3. Resource Data
   - Accessibility, discoverability, overlap data

4. Discussion
   - Data gatherers and executive decision-makers
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!
Example Assessment Calendar

Monthly and Yearly Reviews
<table>
<thead>
<tr>
<th>Quarter 01</th>
<th>Monthly and Yearly Reviews</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Jan – compile list</td>
</tr>
<tr>
<td></td>
<td>Apr – share data with internal group</td>
</tr>
<tr>
<td></td>
<td>Jul – gather feedback</td>
</tr>
<tr>
<td>Quarter 02</td>
<td></td>
</tr>
<tr>
<td>Quarter 03</td>
<td>Oct – share cancellation details</td>
</tr>
<tr>
<td>Quarter 04</td>
<td></td>
</tr>
</tbody>
</table>
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?
taylor.ralph@oregonstate.edu

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Resources


• Collections LibGuide Example: [https://guides.library.oregonstate.edu/collection_development/renewals](https://guides.library.oregonstate.edu/collection_development/renewals)

• Organizing for Open Scholarship White Paper: [https://ir.library.oregonstate.edu/concern/technical_reports/z890s312t](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