The Balanced Collection 2
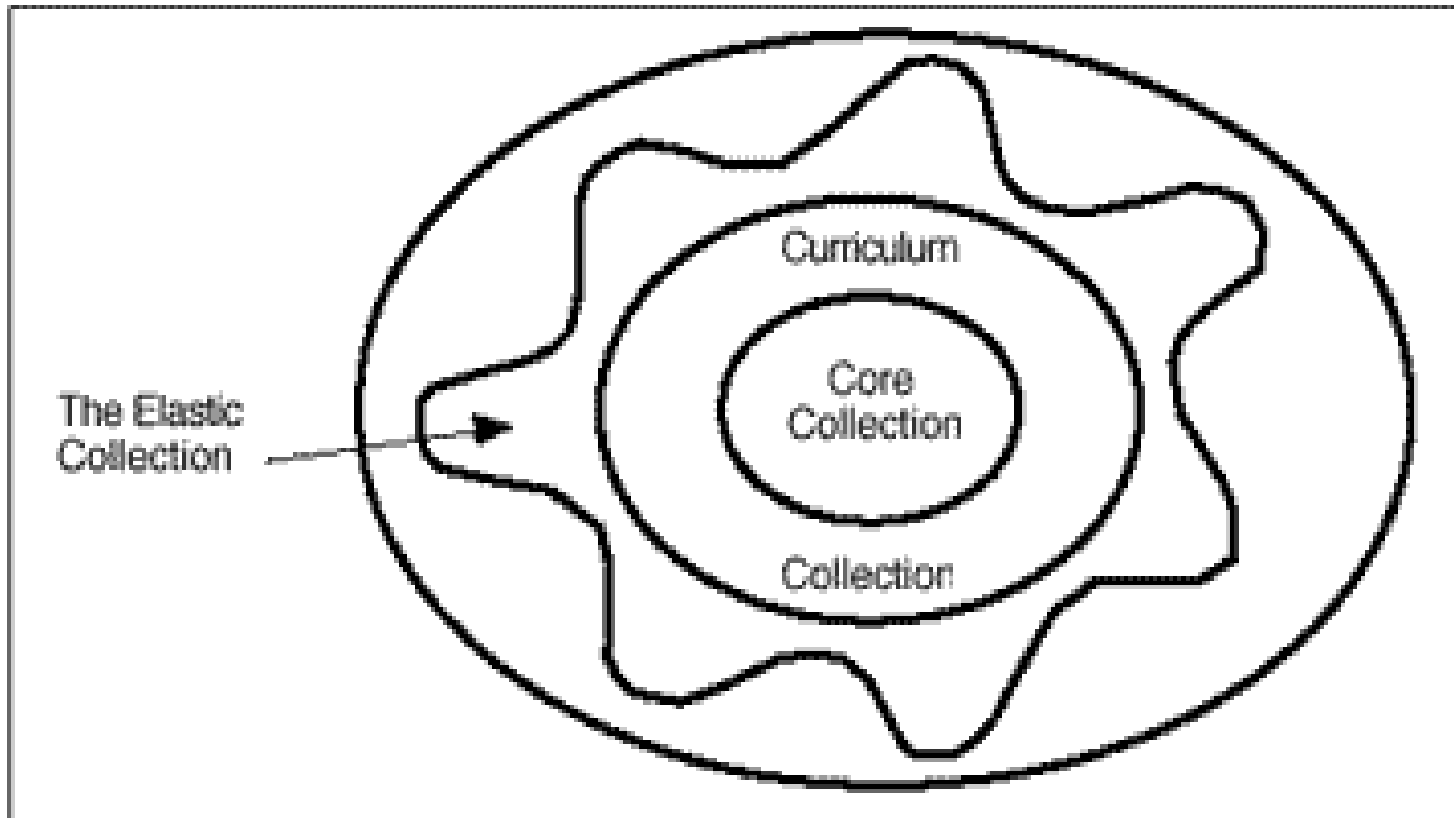
Managing your collection in the electronic environment

Facilitators: Dr. Janet Murray & Dr. Mary Carroll

At the conclusion of the session participants will :

- **Have reconsidered selection criteria for print & electronic resources;**

- **Be aware of the need to update the collection management policy;**

- **Developed a tool for collection evaluation;**
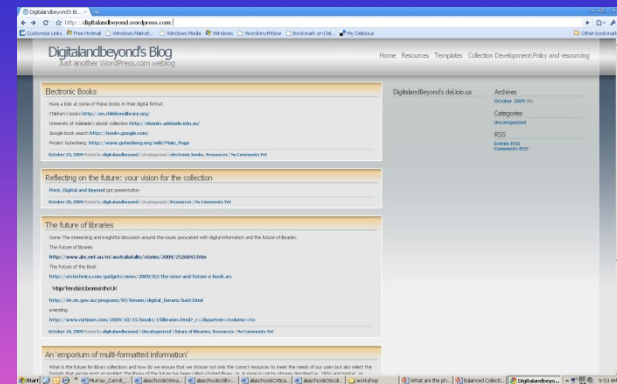
- **Be aware of effective budgeting approaches.**

The Elastic Collection

The Elastic Collection

Curriculum

Core Collection

Collection

From Loertscher, D. 2003, p.6

Selection topics covered in session one 2009 included

- Collection evaluation and needs analysis
- Evaluate content according to prescribed criteria
- Critical success factors
- Collection Assessment

Documentation available at

http://digitalandbeyond.wordpress.com/templates/

The phases of collection development include:

- Learning Community Analysis

- Collection Analysis

- Selection

- Budgeting Process: Budget Planning, Acquisition, Accounting, Funding Sources

- Technical Processing

- Maintenance

- Reconsideration

- Evaluation

The question we need to ask is…

Does format matter?

Selection of electronic material-- considerations

1. Your audience

What do they want?

Consider:

What do you know about your user group?

What you know about their user preferences when seeking information?

Ask yourself…

– do they always use the same type of resource to answer their research and information needs or is it context dependent?

– Do different groups have different needs and preferences?

– Are you making assumptions about their preferences without investigation?

– Do budget or other pressures and constraints force decisions about choice of format

Discussion: Information consumption

'Information' is considered a consumable.

On the list provided rank from 1-13 the chief sources of consumed information.

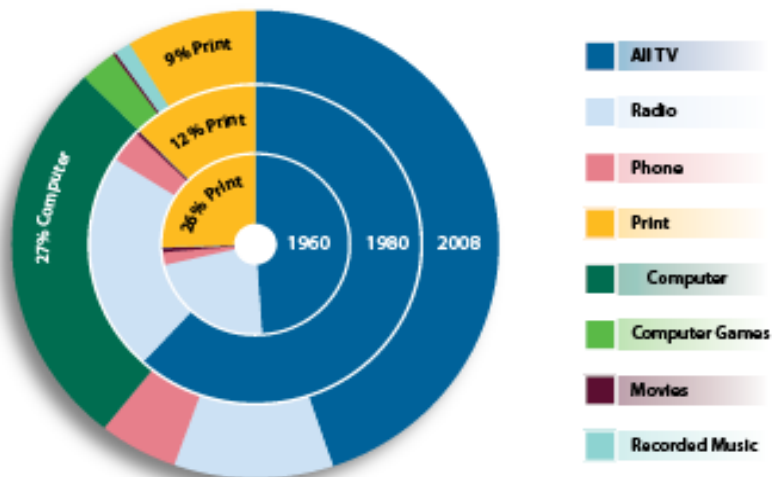Reflect: What are the implications for libraries and their collections?

Information consumption
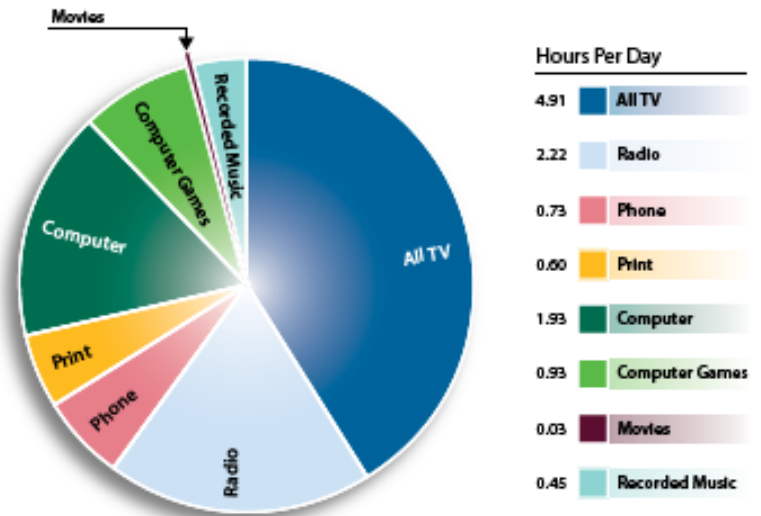
How much information? 2009

http://hmi.ucsd.edu/howmuchinfo_research_report_consum.php

Figure 6: Evolution of Reading
Fraction-of words INFO$_w$ from different sources

Legend: All TV, Radio, Phone, Print, Computer, Computer Games, Movies, Recorded Music

9% Print, 12% Print, 26% Print, 27% Computer; 1960, 1980, 2008

Figure 2: INFO$_H$ Hourly Information Consumption

Movies, Recorded Music, Computer Games, Computer, Print, Phone, Radio, All TV

Hours Per Day	
4.91	All TV
2.22	Radio
0.73	Phone
0.60	Print
1.93	Computer
0.93	Computer Games
0.03	Movies
0.45	Recorded Music

What do we know about information choices?

Group activity

- In small mixed groups discuss and then put order of user preference the resource or information types listed on the sheet.

- Consider carefully any exceptions or generalisations you may be making and comment.

- What are you basing your decisions on?

- Have we got enough information about our users to make informed decisions about resource and research preference?

PEW REPORT: Information Searches That Solve Problems

In a national (US) phone survey, respondents were asked whether they had encountered 10 possible problems in the previous two years, all of which had a potential connection to the government or government-provided information. Those who had dealt with the problems were asked where they went for help and the internet topped the list

• 58% of those who had recently experienced one of those problems said they used the internet (at home, work, a public library or some other place) to get help.

• 53% said they turned to professionals such as doctors, lawyers or financial experts.

• 45% said they sought out friends and family members for advice and help.

• 36% said they consulted newspapers and magazines.

• 34% said they directly contacted a government office or agency.

• 16% said they consulted television and radio.

• 13% said they went to the public library.

• Gen Y members were the most likely to use libraries for problem-solving information and in general patronage for any purpose.

Information Searches That Solve Problems *by Lee Rainie, Leigh Estabrook, Evans Witt* **Dec 30, 2007** http://www.pewinternet.org/Reports/2007/Information-Searches-That-Solve-Problems.aspx

Hmmm…!

A survey of advertising format preferences

- 79 percent say that if they had a choice, they'd rather look through the ads in the newspaper than watch advertisements on TV

- 70 percent say that if they had a choice, they'd rather look through the ads in the newspaper than view advertisements on the Internet.

(Newspapers DEAD? Print still big medium for advertisers11/02/2009)

Marketing research into print vs email as a delivery method

- 57 percent of consumers surveyed by Zoomerang for InfoPrint stated that mail remained the preferred method of delivery for "must-read" documents like statements or bills

- the survey found that, while 71% of respondents "always" open email containing a monthly bill, this jumped to 92% of consumers who received statements by mail.

- Likewise, while 60% "always" open an email containing a bank statement, this jumps to 83% when the bank statement comes in the mail

A poll of executives over new source preferences

- 73% said that print was not becoming obsolete and 59% said they trusted print more than online publications
.

- Roughly 60% said they turned to print when they wanted in-depth information.

- Those polled also said they paid more attention to ads in print rather than online ads.

http://www.bizreport.com/2007/10/poll_executives_prefer_print_to_online_news.html (2007)

Information seeking

Everyday Life Research	Big Picture	Language	Situational	Information-Gathering
Google (i.e., for finding sites other than Wikipedia)	1745 / 99%	1137 / 99%	897 / 98%	1081 / 98%
Wikipedia	1600 / 92%	1043 / 92%	816 / 90%	952 / 88%
Friends	1480 / 85%	972 / 86%	746 / 84%	906 / 84%
Personal collection	1336 / 79%	894 / 81%	734 / 83%	892 / 84%
Government sites	1196 / 73%	827 / 76%	683 / 79%	832 / 80%
Scholarly research databases (e.g., EBSCO, JSTOR, ProQuest)	994 / 57%	709 / 63%	618 / 70%	772 / 72%
Social networks (e.g., Facebook)	986 / 58%	660 / 60%	560 / 63%	606 / 57%
Instructors	889 / 52%	639 / 58%	581 / 66%	672 / 63%
Other search engines (i.e., other than Google, e.g., Ask, Yahoo!)	903 / 52%	641 / 56%	575 / 63%	644 / 59%
Encyclopedias	834 / 49%	607 / 55%	517 / 59%	618 / 58%
Blogs	764 / 48%	530 / 51%	424 / 51%	481 / 49%
Library shelves	721 / 42%	534 / 48%	467 / 53%	573 / 54%
Librarians	454 / 26%	375 / 33%	346 / 39%	374 / 35%

How College Students
Seek Information
in the
Digital Age

1. Big picture: Finding out background for defining and selecting a topic.
2. Language: Figuring out what words and terms associated with a topic may mean.
3. Situational: Gauging how far to go with research, based on surrounding circumstances.
4. Information-gathering: Finding, accessing, and securing relevant research resources.

Course-Related Research	Big Picture	Language	Situational	Information-Gathering
Course readings	1903 / 97%	1624 / 97%	1434 / 97%	1787 / 97%
Google (i.e., for finding sites other than Wikipedia)	1891 / 95%	1622 / 96%	1444 / 97%	1769 / 95%
Scholarly research databases (e.g., EBSCO, JSTOR, ProQuest)	1823 / 93%	1562 / 94%	1375 / 93%	1758 / 95%
OPAC	1791 / 90%	1544 / 92%	1360 / 91%	1725 / 93%
Instructors	1662 / 87%	1433 / 88%	1272 / 88%	1548 / 87%
Wikipedia	1675 / 85%	1439 / 86%	1267 / 85%	1552 / 84%
Government Websites (i.e., .gov sites)	1381 / 74%	1186 / 75%	1055 / 76%	1333 / 77%
Classmates	1362 / 71%	1195 / 73%	1088 / 75%	1264 / 70%
Personal collection	1288 / 69%	1128 / 71%	982 / 70%	1218 / 70%
Library shelves	1312 / 69%	1148 / 70%	980 / 68%	1290 / 72%
Encyclopedias (print or online)	1188 / 61%	1030 / 62%	940 / 65%	1112 / 61%
Friends	1088 / 57%	952 / 58%	867 / 60%	1000 / 56%
Other search engines (i.e., other than Google, e.g., Ask, Yahoo!)	1022 / 52%	892 / 54%	814 / 55%	964 / 53%
Librarians	865 / 45%	784 / 48%	695 / 48%	848 / 47%
Blogs	474 / 25%	423 / 26%	385 / 27%	448 / 25%

2. Format specific consideration Policy

Overview of a CDP

1. Vision, Mission and Objectives
2. Responsibility for selection
3. Criteria for selection
4. Collection evaluation and assessment
5. Withdrawal
6. Scope of the collection
7. Gifts and donations
8. Statements on issues such as censorship, information literacy and intellectual freedom
9. Statement for reconsideration of material

Additional information for electronic material

Any policy statement about electronic information should be linked clearly to the guiding principles of the overall CDP.

Additional Information which may be required

Introduction: A clear statement of the relationship between electronic material selection and the generic principles associated with overall selection

Definition: Provide a scope note indicating what materials fall under the definition of "electronic" material

Selection: Outline any specific consideration which will apply to the selection of electronic material

Groups involved in the selection process include: Who will be involved in resource selection? Who will make decisions

Specific Format Criteria: criteria in considering the purchase of off-line electronic resources.

•Have you the necessary amount of staff time to provide access, training, and assistance for new electronic resources
•What improvement or enhancement that the resource will give to existing print materials
•the long-term usability of a resource's data (10 years or more)
•the broad accessibility of the resource under present copyright laws and licensing agreements
•the compatibility of the resource with existing hardware about to be purchased or already in the Library
•the availability and adequacy of documentation
•the user-friendliness of the resource
•the ability to network the resource if deemed appropriate
•the replacement policy of the publisher in the event of damage or theft.
•Archival access to information over the long-term
•Legal and licensing arrangements

Collection Evaluation Questions

1. Is the collection current?
2. Does it cover all components of the curriculum?
3. Ratio of online subscriptions v. hard copy?
4. Access to PCs v. Access to print resources?
5. Are resources in a variety of formats
6. Are e-resources relevant and cost effective?

Collection Evaluation Methods

- **Direct evaluation**
- **Collecting/compiling statistics**
- **Checklist method**
- **Applying standards**
- **Collection turnover**
- **Collection mapping**

Direct Evaluation

- **Superseded or out of date materials**
- **Unnecessary duplicates**
- **Worn or damaged items**
- **Materials in subject areas which are no longer important**
- **Materials which are unacceptable**
- **Direct examination of the collection by library staff or experts (i.e. subject teachers);**
- **Might ask experts to look at weeded materials before disposal.**
- **Weeding must be carried out in all formats – including electronic.**

Compiling Statistics

- **Numbers of titles in the collection**
- **Number of titles added each year**
- **Acquisitions expenditure**
- **Circulation statistics**
- **In-house use statistics**
- **Unfilled requests and filled requests**
- **Usage of databases and e-resources**
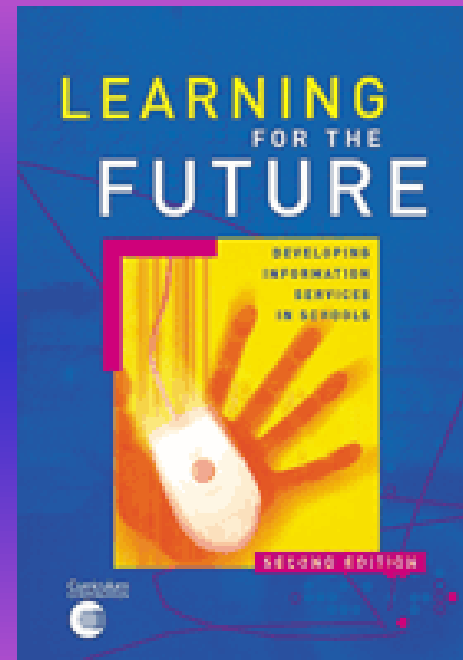- **Collection turnover (Loans / Number of items in collection or part of collection)**

Checklist Method

- **Collection is checked against standard lists and bibliographies**

- **Both qualitative and quantitative**

- **Has to be used with caution as checklists go out of date quickly**

-

EXAMPLES?

Applying Standards

- **Learning for the Future 2nd. ed.**

- **Overseas standards i.e. AASL with caution**

Collection Mapping

- **Graph of the collection showing holdings in major curriculum areas, by date of publication;**

- **Highlights strengths and weaknesses of the collection as related to the curriculum.**

Indicators of Excellence

- **Written collection development policy;**
- **Collection map indicating strengths and target areas;**
- **A current collection in a variety of formats that is relevant to needs;**
- **Budget planning.**

Budget Formulation

- **Present collection size**
- **Average item cost**
- **Expenditure needed for new curriculum**

- **Expenditure for collection gaps**
- **Costs for processing materials /or shelf ready costs**
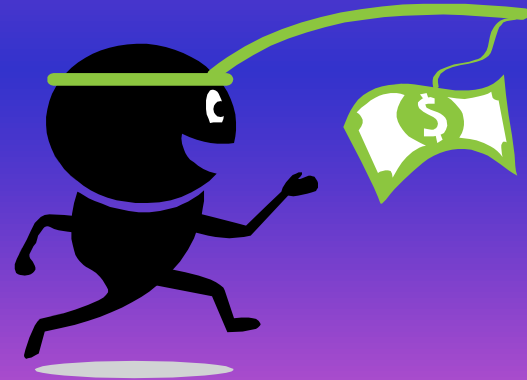
Itemised Costs

- **Cost of library service per student per annum**

- **Cost per book loan**

- **Cost per use of a database**

- **Cost per item – averages for books & other formats etc**

Budgeting – Sharing Ideas

In small groups consider:

- **Using "free" resources i.e. ERA**

- **Using consortia membership effectively**

- **Budget formulae**

- **Can each member of the group contribute a budgeting tip?**

MCT February 2010

Terminology

Communicate the budget as an INVESTMENT not a COST!

Blog Resources

http://digitalandbeyond.wordpress.com/

Delicious.com/DigitalandBeyond

Includes:

- Collection evaluation awareness criteria

- Collection assessment form sample

- Resource evaluation form

MCT February 2010

Forward Planning

- **Revising the collection development policy**

- **Formulating the budget**

- **Creating a benchmark**

- **Use the blog and deli.cio.us as a resource**
  http://digitalandbeyond.wordpress.com/

  Delicious.com/DigitalandBeyond

  MCT February 2010

Print, digital and beyond: Collection Development in the 21st century

The Balanced Collection

Facilitators: Dr. Janet Murray & Dr. Mary Carroll