Streamlining Collection Assessment
Reusable Data for Sustainable Practices

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Context

Western Washington University

- Large, Master's-granting, public university
- 2024-25 FTE: 13,227 (12,562 Undergraduate, 665 Graduate)

Western Libraries

- ~$2.1 million resource access budget
- 1 main library building, 1 music library, no offsite storage

Collection management challenges include:

- Limited physical space
- Budget pressures

Collection management at Western

Collection development methods

◦ Approval plan

◦ Purchase requests

◦ Librarian selection

Routine collection management tasks:

◦ Firm order collection development

◦ Subscription Review

◦ Weeding

Assessment silos

Collection development and management activities are interconnected, but data and assessment activities are siloed.

Siloed processes make it challenging to:
◦ Avoid duplicate/redundant work
◦ Maintain data integrity
◦ Reuse or repurpose data and reports

Consequences for collection development and management:
◦ Difficulty approaching collection activities holistically
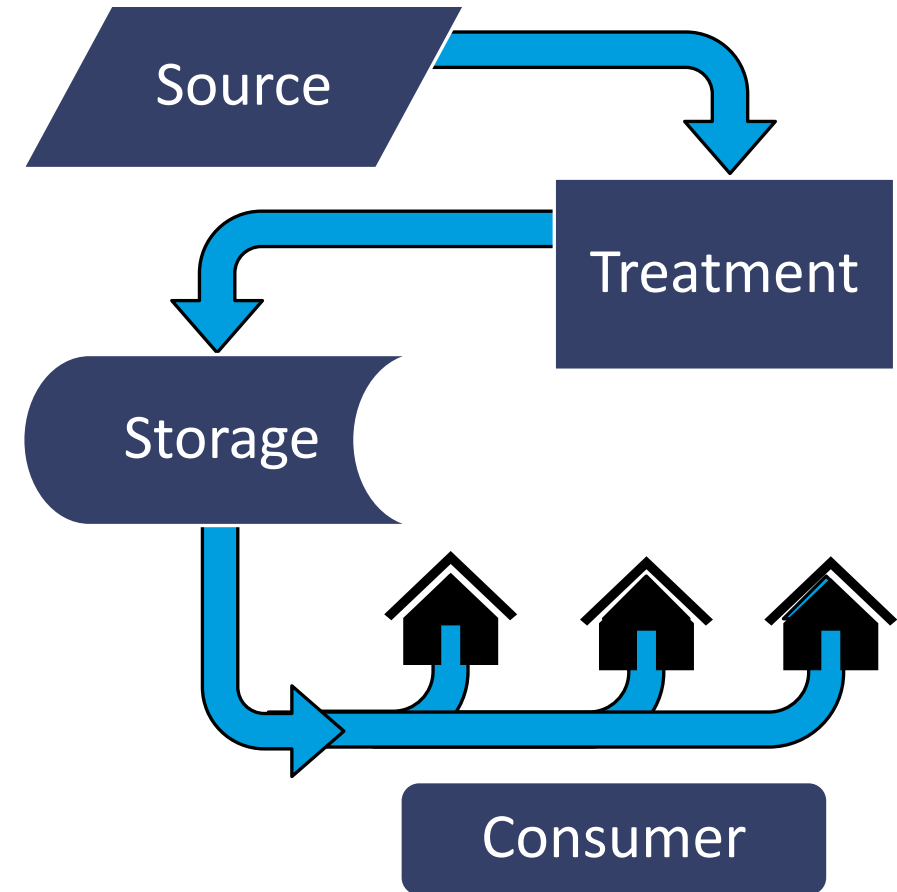◦ Missing key information for decision-making

What I mean by "data infrastructure"

Systems that make data collection, transformation, and analysis reusable.

Key principles
◦ Modular workflows
◦ Cross-project data use
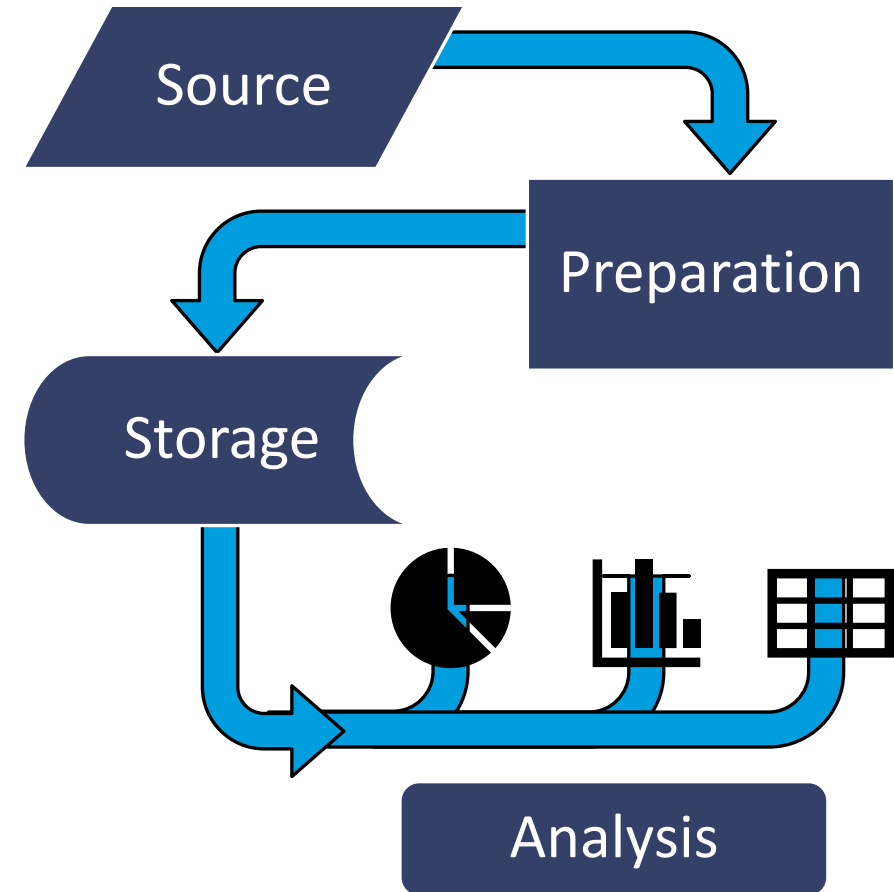◦ Automation

Analogy: Water distribution system

Source

Treatment

Storage

Consumer

Data distribution system (pipeline)

Source: Data source (ILS, e-resource platforms, other systems)

Preparation (Treatment): Filtering, cleaning, other transformations

Analysis (Consumer): Reporting process, collection workflow

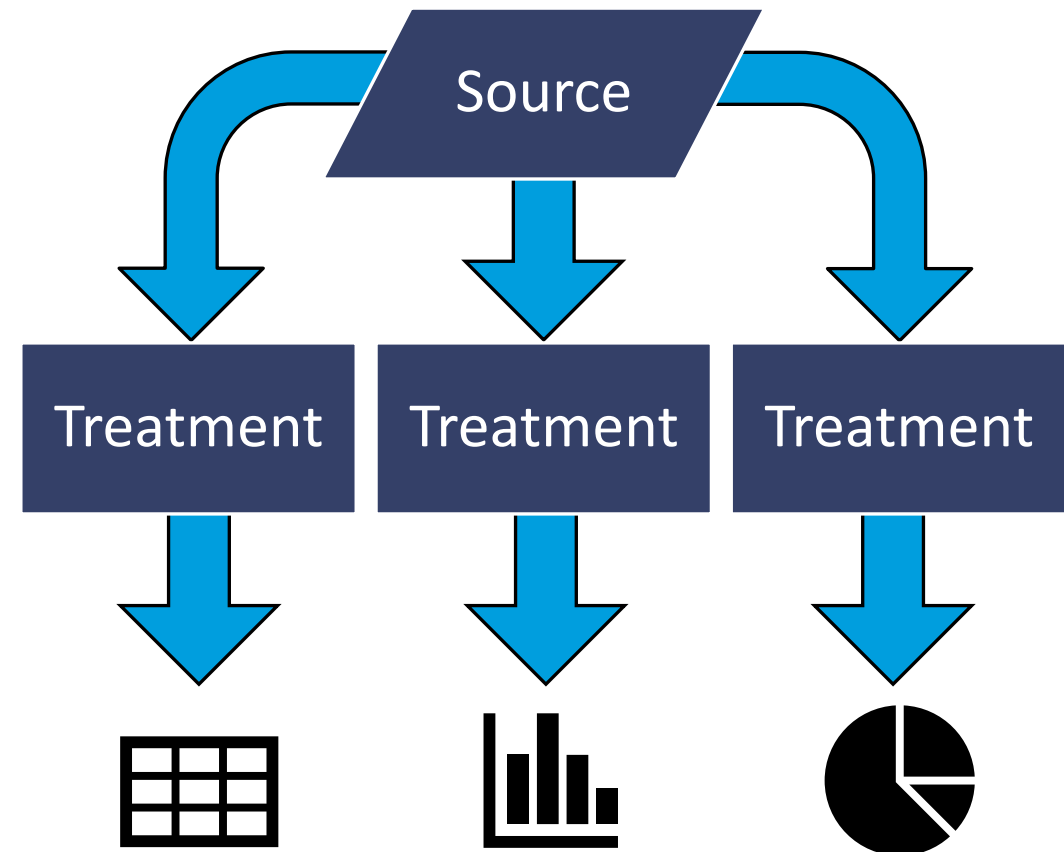Source → Preparation → Storage → Analysis

Example: Course reserves usage data

Processes
- Weeding
- Subscription Review
- EBA selection

Shared source

Duplicate preparation

Streamlining

Information gathering
- Identify key data tasks and workflows
- Articulate fundamental assessment questions

Develop "modular" procedures
- Pinpoint where workflows must specialize
- Focus on reusable "upstream" processes

Create multi-use datasets and reports
- Save and share ready-to-use data
- Design reports that support multiple decision-making processes

Identifying key data tasks

Create a timeline of routine collections work

Highlight recurring data workflows

For each workflow, identify:
◦ Data source
◦ Transformation/calculation steps
◦ Deliverables

Example: Usage data

Subscription Review

E-book Usage

Annual Subject Liaison Meetings

Print Circulation

E-book Usage

Weeding

Print Circulation

Finding core assessment questions

Information need
- ◦ Define what the data is trying to measure
- ◦ Clarify how findings will inform decisions

Workflow application
- ◦ Identify the process it supports
- ◦ Determine the audience

Parameters
- ◦ Decide what level of collection segmenting is required
- ◦ Find minimum necessary update frequency

Example: Title-level circulation data

Annual Subject Liaison Meetings
- Recent acquisitions

Assessment of niche collections
- Subsets of circulating collection

Weeding
- Entire circulating collection

Information needs
◦ Do our users need this item?
◦ Will this item be used in the future?

Workflow
◦ Tasks: Selection/Deselection
◦ Audience: Subject liaisons

Parameters
◦ Segmenting: Circulating monographs
◦ Timeframe: 2013 - present

Modular procedures and reusable data

Find overlapping key data tasks
- ◦ When do workflow-specific needs emerge?
- ◦ Which "upstream" steps can be combined?
- ◦ Where does this fit on a timeline of collections work?

Methods
- ◦ Start with available tools
- ◦ Plan to regularly evaluate and adjust methods

Example: Consortial holdings data

Weeding

- **Deadlines:** April and October
- **Scope:** Main monograph stacks, items acquired 5+ years ago

Annual Subject Liaison Meetings

- **Deadline:** August
- **Scope:** Recent acquisitions

New process

- One-time collection of holdings data for entire main collection.
- Upload CSVs to SharePoint, create Power BI dataflow.
- Monthly, lightweight process to update data.

Reusable reports

Build deliverables that support multiple workflows
- Projects that ask the same fundamental questions
- Overlapping scope

Align reporting timeline with project deadlines

General enough for reuse, with option to specialize as needed

Example: Collection summary

Weeding

- Analysis of entire circulating monograph collection, including:
  - Bibliographic data
  - Holdings at other libraries
  - Circulation
- Collection overview report used for planning and strategy

Reuse potential
- Collection development
- Outreach

New collection summary report
- Start with weeding reports
- Add new filters
- Regular data refreshes

Example: Acquisitions assessment

Background: Planned projects to assess the effectiveness of approval plan, purchase requests, and title-by-title selection have been deferred for multiple years.

New approach:
◦ Combine into single assessment project
◦ Build on existing data workflows
◦ Re-use existing reports
◦ Create "general purpose" reports as project deliverables

Outcomes

Improved efficiency
- Workflow automation
- Simplify troubleshooting

General support for assessment work
- Wider range of data points available to enrich existing processes
- Starting point for development of new processes
- More capacity for large/one-time assessment projects

Questions

What types of collection data do you find yourself preparing repeatedly for different projects? How might that data be shared or structured differently to support multiple uses?

What kinds of silos exist in your library's assessment or collection practices? Are they technical, organizational, or something else?

If you could automate or standardize one recurring collection assessment task, which would it be? What would it free you up to focus on instead?