

Collections Assessment: Your Competitive Advantage

As the general collections in our libraries become more homogenous and widely shared and more information seeking happens online and in common, virtual spaces, libraries are turning to their special collections as signifiers of distinction and value. Yet at the same time, budgets are static or decreasing and our traditional operational models are challenged as teaching, learning and research change rapidly. The call to demonstrate greater impact in judicious and efficient ways has never been greater. A thoughtfully conceived collections assessment can be your competitive advantage in furthering your library's mission, securing extra resources and more strategically connect your collections with your constituency. For all these reasons, the Ohio State University Libraries is undertaking a survey of its under processed special collections.

[Slide 2]

Like many other libraries, OSU is in the midst of significant change and in 2011, the time seemed right for an assessment of our distinctive collections.

OSU Libraries Context:

- Long history of building strong special collections and engaging communities of scholars in their acquisition and use. But not one of processing, description and digitization, resulting in a backlog.
- The main library was completely renovated, requiring all the staff and every collection to move out, rethink their operations and move back in to what is essentially a brand new building in 2009.
- In 2010, a new library director came onboard. Hired a whole new administrative team in 2011. The new director comes from a production oriented, technical services background, values data driven decision making.
- Staff with long careers retiring means a potential loss of institutional memory.
- And like every other university, we are defining new strategic directions in the face of rapid change in higher ed.

So we are at the precipice of a major transition.

[Slide 3]

As a library, it is critical that we face this transition in the context of the university's strategic plan. Alignment and value to the broader enterprise is key to increased support and actual

success. Whether it's the library or special collections it can only be a benefit to get into the flow of the larger institution.

How do you do that? Take up the university's mission, vision, plan and pick it apart looking for areas of resonance.

Excellence to eminence = in the creation and dissemination of knowledge.

Values:

- Collaboration – President Gee, creating one university, outreach and collaboration -- we will work together towards a common goal, silos are no longer accepted, we will align with academic programs
- Change and innovation -- Gee, research prominence -- in ways that connect collections to scholars in areas of research strength
- Simplicity in our supporting processes -- Gee, operating with fiscal soundness and simplicity -- we must operate with efficiency and purpose with our work, we must un-complicate processing, for example
- Openness and trust -- Gee, putting students first -- which I'm going to connect with accessibility of collections

OSU's core goals are pretty easy to align to and typical for a big research library.

Point out that resource stewardship is highlighted here, which connects us back to doing a collections assessment, so that you know what you have, can prioritize action, so that you can have impact on the mission.

The discovery themes are not so straight forward.

[Slide 4]

The Libraries' strategic plan aligns with the university as mentioned above but is also critical context for where special collections takes its direction.

Pulled out some of the pervasive ideas woven into the specific wording: digital collections, access, distinctiveness, impact, user oriented, alignment with campus initiatives, high value, assessment. All of these echo the universities values: change and innovation, openness and access, research prominence, operating with fiscal soundness and simplicity.

[Slide 5]

These days, it is critical that Special Collections respond to these larger contexts and I think it's easy for us to do so with some reframing and small effort.

- Our distinctive collections should be tied directly to areas of research prominence at the university. Special collections might be the future of the research library but only in response to core needs on campus.
- It is no longer acceptable to have collections that no one can discover or know about. Collections are valuable because they are used. By focusing on connecting our collections to the faculty and students on our campus, we deliver some of the libraries' most distinctive services. What makes special collections distinctive today is what we do with them: mobile, discovery, digitization and partnerships.
- We need to get more stuff out to our users faster, providing self sufficiency, and getting materials into users pathways. With trends profession wide on efficient processing, digitization and online discovery we connect with the universities' and libraries' drive toward innovation, simplifying practices and being better stewards of resources.
- Special collections are at the core of what the library wants to be for its campus, an intellectual crossroads: a physical and virtual place for cultivating intellectual inquiry and the development of critical thinking skills, promoting academic discourse, and fostering lifelong learning and knowledge enhancement.

[Slide 6]

So why do a collections assessment?

- Such a long and strong history of collecting generates a huge backlog.
- Second, given the limited resources and changing context we need to identify where one collections align with needs on campus so that we can identify distinctive services, engagement opportunities and what content to expose and digitize.
- Third, remember these guys? [slide] production oriented, data driven decision makers with resources regardless of how limited they are. Administrators want strategic, efficient solutions, prioritization, articulation of impact, how much and how many and which collections should go first to get the most attention. A thoughtfully constructed collections assessment can provide the evidence needed.

[Slide 7]

So we took a little money from a vacant position and hired a temporary project archivist. Not necessarily a solution that will work for everyone - note local context: hiring freeze/vacancies, one AD was actually pushing for it. Your resource allocators may have different drivers but all want fodder for data driven decision making.

We also pretty quickly identified that there was a model and a tool out there that we could use that wouldn't have us reinventing the wheel, we stole PACSCL's database.

The rest of these strategies were possible because of my authority as AD, but ground roots may have similar success, depending on environment.

Asked the curators to put the time in, that this was a priority and the way they would get resources.

[Slide 8]

- Give project archivist authority to force the hard decisions

[Slide 9]

- Definitions = access focused. Can a user find something online, on their own without help from a curator?

[Slide 10]

[Slide 11]

[Slide 12]

- Forced them to rank collections in terms of research value so that we can prioritize when we are done. In context of alignment.

It's too early for findings so I can't tell you what we've found or if this methodology actually works or not.

By September, we will know way more about our collections in the aggregate than we have ever known and will begin to see trends of what kind of work needs to be done.

[Slide 13]

What are we going to do with our findings?

- Hire a special collections cataloging workflow manager
- Hire a special collections processing coordinator
- Articulate solutions to discovery challenges

- Digitize like crazy
- Talk to faculty to identify priorities
- Write grants
- (possibly) Deaccession

[Slide 14]

Why are we going to be successful?

IT'S IN THE STRATEGIC PLAN

Plus:

- Data driven, production oriented administrative team (*technical services oriented director*) -- *know your audience*
- Ownership by at the AD level -- get a champion
- It is aligned with other elements of the strategic plan which we can't achieve without this foundation.
- Leverage innovation
- We will be ready to take advantage of opportunities

[Slide 15]

What should you do?

- Decide why you want to do a collection assessment, don't do one just to do one
- Consider your driving forces (strategic plan, resource allocation)
- Engage stakeholders (resource allocators, audience, staff)
- Use available tools (read the report)

The solution needs to fit your local situation. Take advantage of your environment.

[Slide 16]

One last thought. We should stop coming at this from a collections centric point of view. Instead of pushing our treasure collections, to be successful special collections needs to be responding to trends on campus, needs of the faculty, strategic directions of the library and addressing the big challenges of higher ed (self service learning/discovery, deep engagement/learning, critical thinking, skill building, student satisfaction). We should undertake collections assessments to better align our collections with the broader environment, not just because they are there.