Monitoring and Evaluation of Library Resources

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“A very short examination of a library is sufficient to enable one to describe the owner in general and unmistakable terms.”

Author Unknown
Workshop Engagement

- It is expected that all of us:
  - contribute constructively;
  - respect each others opinions;
  - ask questions and actively debate;
  - challenge conventional thinking and practices;
  - enjoy
Nature of the Workshop

- Concept presentations
- Discussion groups
- Feedback sessions
Aim

- Established an understanding of:
  - What is CDM (diverse aspects)
  - CDM Policy & Guidelines
  - IR Grant

- Identified core challenges and strategies
  - Identified impacting factors
    - External (Global Trends etc.)
    - Internal
  - Identified stakeholders
    - Relationship management
  - Identified best practices
    - Procurement & Asset Management
  - Identified and agreed to roles and responsibilities

- Identified mechanisms for monitoring and evaluation
Overview of Collection Development

- Basically
  - Identify what has/is to be done
  - By whom
  - For what purpose
  - How do we know that what we've done was done effectively and efficiently
What are your expectations of this workshop in view of the current challenges that libraries are facing?

- Video: https://www.youtube.com/watch?v=6bofpsEciiQ
- Expectations:
  - Reporting on impact / value
  - Opportunities
  - Environmental impact e.g. buildings versus digital / virtual environment
Group Work 1: CDM Basics

- Groups:
  - Mixed groups
  - 5 Persons per group

- Exercise:
  - What is collection development and management? (10 minutes)
  - Identify core activities associated with each of the broad processes (10 minutes)
  - Identify stakeholders (5 minutes)
  - Identify user community (5 minutes)
  - What have you done differently due to the current circumstances (5 minutes)
  - Feedback (5 minutes per group)
Group Work 1: CDM Basics

1. User needs analysis
   - Initial analysis of user needs
   - Identifying emerging trends and policies

2. Resource management
   - Management of library policies and security
   - Admin - shelving, patron updates

3. Staff, students, and community members
   - Internal users

4. E-reader, Wi-Fi hotspot, SAAS

Current trends will determine what we can do differently.
Group Work 1: CDM Basics

Core activities:
- Needs analysis
- Selection process
- Budgeting
- Acquisition
- Processing of materials
- Procurement of Information Resources (it need to be relevant to our individual user need)
- Process where we need keep in touch with our users needs.
- Select, Weeding, Procure, Weed, Update/Maintain/Identify gaps
- Community, school children, Lecturers, Researchers, MPLs, Other Departments, Board Members, Vendors, Procurement

3. Maintain long use:
   - Weeding (long use materials)
   - Stocktaking
   - Repairs (Books)
   - Replacement
   - Identifying gaps
   - Evaluation and monitoring of the use of resources

4. Researchers, Students, Faculty e.g. Academic MPLs & Staff Members e.g. Special Lib
   - Community at all e.g. Public Library
   - Some

Group Work 1: CDM Basics

GROUP 3

1. What is collection development and management
   - A constant on going examination and evaluation
   - Of information resources to ensure relevance,
   - Accuracy and value in a particular library service
   - Management of library resources
   - Management of library processes (acquisition, Cataloguing,
   - Encouraging IKS in our collection

2. Identify core activities associated with each of the
   broad processes
   - Information literacy
   - User education
   - Computer literacy
   - Outreach activities (Story telling, displays, life
   - Skills training

3. Identify stakeholders
   - Academics
   - Community members & leaders
   - N.G.O.
   - Government/Mzansi Libraries
   - Politicians

4. Identify user community
   - Researchers
   - Parents
   - Professionals
   - Students
   - Children

5. What have you done differently due to the
   current circumstances
   - Free access to WiFi
   - Access to E-RESOURCES
   - SHARING OF INFORMATION & RESOURCES
   - COLLECTION DEVELOPMENT POLICY
Feedback - What is CDM?

- Examination of resources
  - Relevance etc.
- Management and processes of resources
- Unified exercise
- Appraisal IKS
Feedback - What are the core activities associated with CDM?

- IL, CL
- Outreach activities, life skills
Feedback - Who are your stakeholders?

- Community members
- NGOs
- Politicians
- Academics
- Tax payer
- Patron (ultimately)
Feedback - Who are your user community?

- Researchers
- Parents
- Scholars
- etc
Feedback - What have you done differently over the past two years?

- Free access to resources
- Free access to wifi
- CDM policies - reflect
- Other?
Collection Development & Management - Defined

- The Library is vested with the responsibility to build and shape collections that not only demonstrate contemporary relevance, but are sufficiently responsive to the information needs of today and tomorrow’s library users.

- Resources should be relevant to and support the institution’s strategic and cultural imperatives.
CDM Policy and Guidelines
Purpose

- Expression of our perception of our mandate and philosophy
- Tool to describe an individual library’s objectives in developing its collections” (ALA, 1996)
- “Social contract” between library and its “clientele”
- Demonstrate accountability for how IR Grant is being spent
- Communication tool
Section A: Policy

Overview: context, philosophy and principles

*Information resources funding*

- Information Resources Budget
- Fisher Bequest Fund
- Humanities Library Research Fund
- Research Grants

*Responsibility for collection development*

Access to collections

The Cory Library for Historical Research

Rhodes University Research Institutes, Centres and Units

Review of the Collection Development & Management Policy and Guidelines
CDM Guidelines

Section B: Guidelines

8. Collection development: selection guidelines

8.1 General criteria for selection of all materials

8.2 Library materials and collections

8.2.1 Audio-visual material
8.2.2 Electronic resources
8.2.3 Government publications
8.2.4 Loose-leaf publications
8.2.5 Maps
8.2.6 Microform
8.2.7 Monographs
8.2.8 Music scores
8.2.9 Newspapers
8.2.10 Out-of-print materials
8.2.11 Prescribed and recommended materials
8.2.12 Reference collection
9. Collection management and maintenance - general guidelines:

- 9.1 Location and organisation of materials
- 9.2 Duplicates
- 9.3 Replacements
- 9.4 Acquisitions for new courses, research programmes
- 9.5 Disinvestment
- 9.6 Gifts and donations
- 9.7 Short Loan collection
- 9.8 Loan of Research Grant material
- 9.9 Binding
- 9.10 Classification and reclassification
- 9.11 Inventory control and shelf maintenance
- **9.12 Evaluation and assessment**
Workshop: next steps

- We have now looked at the basics concepts (our mandate)
- We need to look at what we have been doing (in support of the mandate)
Group Work 2: Monitoring and evaluation

Groups:
- Mixed groups
- 5 Persons per group

Exercise:
- How do you assess the relevance of your materials?
- How do you assess the completeness of your collections?
- How do you assess the validity of your collections?
- Which tools do you use to monitor and evaluate your resources?

Feedback (5 minutes per group)
Group Work 2: Monitoring and evaluation

GROUP 1

1. Circulations
   - In-house usage
   - Requests - clients

2. Statistics
   - Survey - requests
   - Networking - professionals
   - Specialized
   - Usage & return
   - Update - regularly
   - Networks - publishers

3. Suggestion boxes
   - Statistics
   - Weeding & de-duping
   - Requests

GROUP 2

1. How do you assess the relevance of the materials?
   - Collection development policy will guide you
   - House work, faculty / student
   - Donations to other institutions
   - Curriculum currency

2. Assessing the completeness of your collection
   - Subject coverage
   - Target clients
   - Millennium recommends
   - Interlibrary requests

3. Assessing the currency of your collection
   - User surveys
   - Authorship
   - Currency: esd, editorial, public list date
Group Work 2: Monitoring and evaluation

GROUP 3

1. How do you assess the relevance of your materials?
   - In-house usage
   - Enquiring about it
   - Circulation statistics
   - Survey

2. How do you assess the completeness of your collections?
   - User feedbacks / Staff feedbacks
   - Surveys
   - Exhibitions

3. How do you assess the validity of your collection?
   - Feedback
   - Surveys
   - Circulation Stats
   - Stock taking

4. Which tools do you use to monitor & evaluate your resources?
   - Stock taking
   - Weeding
   - 3M System (detector machine)
   - Library software systems
   - Recommendation wish lists from lecturers

Tools you use to monitor & evaluate your resources:

- Collection analysis
- Benchmarking with other institutions
- Quantitative - Stack
- Qualitative - feedback, usage
- Academic staff

Subscription or databases - e-resource

[Handwritten notes on the right side of the page]
Feedback: Relevance of Collections

- Relevance as example...
  - Feedback from users
  - Extent of collections
  - Age of collections
Relevance: Feedback via LibQual

- “Some books are kind of outdated and cannot be useful with the dynamic world”
- “Bit frustrating because of a limited number of books and a large number of students”
- “Books are often missing which is unacceptable”
- “The library needs a wider variety of books in the Social Sciences”
- “I wish if the main library could stock more prescribed textbooks”
Extent of collections

- Number of physical items (books, periodicals, multimedia): approx. 450,000
- Print periodical title subscriptions: 446 titles
- Electronic resources: access to 126 databases; we also subscribe to 293 individual online journal titles
- Information Resources Budget: R11,922,748.31 in 2012 with 80% allocated to e-resources (databases and individual e-journals)
- Estimated 20 000 not on system!
Relevance: Age of Collection

Overall Collection Age

% of Stock

3 Areas for Discussion

- IR Grant
- Responsibility for Collection Development
  - The role of the librarian
- Assessment and Evaluation
- Reporting
CDM: IR Grant

- IR Cycle
- Communication
- Responsibilities

- Fiscal Responsibility - Good Faith
- Redefine Libraries - Community Centre
  - Issues - Illiteracy
  - Poverty
IR Grant: Cycle

- Library Committee agrees the Library Services Division Budget 1\textsuperscript{st} draft (3\textsuperscript{rd} Quarter)
- University Budget process (4\textsuperscript{th} Quarter)
- University Budget approved by Council (December)
- Grant funds made available to Library by Finance Division (February)
- Library Committee Collection Development Sub-committee recommendations approved by first Library Committee (February/March)
- Grant letters to Heads of Departments (after first Library Committee meeting)
- IR Grant Information Sessions for HoDs, Departmental Liaison Staff & Faculty Librarians (late March)
- New book & selective re-ordering from previous year (1 Feb to 30 September)
IR Grant: Cycle

- LC Collection Development Sub-committee reviews next year’s journal & database subscription budget (June-July)
- Journal & database subscription cancellations for next year (August) & bulk renewals (September)
- Last book orders accepted from departments (30 September)
- Last book orders placed with suppliers/publishers (31 October)
- Outstanding orders & commitments cancelled (from 1 December)
- Remaining funds transferred by Finance Division to Retained Income account (15 December)
IR Grant: Communication

- Regular correspondence re:
  - Status of orders
  - Status of grants
  - Continual interaction between staff
CDM: Evaluation & Assessment

- Evidence-based management requires the use of metrics to assess performance and measure the value and impact of services.
- Incorporating evidence in CDM processes
Group Work: Evaluation & Assessment

Groups:
- Mixed groups?
- 30 minutes

Exercise:
- What management information (reports) do you need that demonstrates the value of collections, and the return on investments?
- Indicate the unit that is responsible for supplying the information?
Feedback: Reports required to express ROI and value

- Use of Collections:
  - Usage Statistics of e-resources, including turnaways
  - Circulation statistics of materials
  - In-house use / browse

- Above defined in relation to:
  - Community needs
  - Investment
  - Outcomes (impact)
Additional

- Additional identified:
  - Training?
  - Additional Information Sessions
  - CDM Policy & Guidelines – rework
  - Marketing

- Rhodes Collection Development & Management Policy and Guidelines
  - Under review
  - Available online
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