Choose Your Own Adventure
A Thrilling Journey of Collaborative Collection Assessment

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Cast of characters: Our Research Team

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Information Resources Coordinator

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Librarian for Collection Development and Evaluation

Caroline Muglia, University of Southern California
Co-Associate Dean for Collections/Head, Resource Sharing & Collection Assessment

Jeremy Whitt, Pepperdine University
Scholarly Resources Librarian
Prologue: Getting to Know Each Other

- To watch you crash and burn - the whole idea of multi-institutional collection assessment seems like a terrible idea and my lunch plans were canceled
- I’m interested in the idea of multi-institutional assessment, but haven’t tried it myself
- I have experience with multi-institutional assessment and can’t wait to share it with everyone in the room during the discussion
True story
The Adventure Begins...
Choose Your Adventure:

Does this sound like a good idea?
Choose Your Adventure: Does this sound like a good idea?

<table>
<thead>
<tr>
<th>Page 75</th>
<th>Page 21</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes - let's do this thing!</td>
<td>Not so fast.</td>
</tr>
<tr>
<td>We'll learn as we go along.</td>
<td>What are we getting ourselves into? Have any of us done this before? Don't we have other work to do?</td>
</tr>
<tr>
<td></td>
<td>Proceed with caution, if at all.</td>
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YES! Let’s do this thing. Why?

- To learn from one another
- To learn more about facets of our individual collections
- Examine data to support conversations about print vs. E in our libraries
- SCELC -- piloting the idea of informal research groups under the consortial umbrella. We are within driving distance to one another and we see each other face-to-face. Proximity helps.
- Findings that art books were used in a specific format and we wanted to investigate if that was true for our institutions.
Research questions

- What is the relationship between e-book usage in Art & Architecture and that in the print collection in the same call number range(s)?
- Does usage reveal a user preference between electronic and print format for Art & Architecture?
- Have usage patterns changed over the past 5 years in Art & Architecture?
- Does access model or DRM impact e-book usage in Art & Architecture subject areas?
- Is usage by publisher consistent across print and electronic formats?
- Is it possible to generalize trends in e-book usage in Art & Architecture, or is there too much variability among institutions?
Data Collection Parameters

- Art and photography books: LC call numbers N - NX and TR
  - E- and print
- Circulation / usage data from 2010-2015
- Title
- Publisher / Imprint
- Publication year
- ISBN
- OCLC no.
- Vendor (e)
- Access model - owned or subscription? (e)
- License / DRM (e)
What are we talking about when we’re talking about usage?

PRINT

● circulation check-outs
● renewals
● “soft” (in-house) check-outs for non-circulating materials

E-BOOK

● COUNTER BR2 usage reports - section requests
Other considerations we could have (should have?) made...

- Communication (in person / online live / email)
- File sharing (email vs. shared cloud collaboration)
- Naming conventions
- Data logs
Choose Your Adventure:

Data Collection & Merging
<table>
<thead>
<tr>
<th>Page 32</th>
<th>Page 107</th>
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<tbody>
<tr>
<td>We’re farther along than we were when we decided to undertake this project, but we should run a proof of concept study with a sample set of data from each institution.</td>
<td>These parameters make sense.</td>
</tr>
<tr>
<td></td>
<td>Let’s run the reports and dump them into a giant shared Google spreadsheet!</td>
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</tbody>
</table>
Data Collection (Page 107) : The Fire Swamp
Struggles (AKA, The Fire Swamp): Collecting & Combining Data

- Identifying data sources for our project (ILS reports, COUNTER reports, non-COUNTER reports)
- Remapping data
- Lack of standardized, accurate, or comprehensive data
- In-house data collection practices and their effect on circulation reports
Struggles (AKA, The Fire Swamp): Three Different Integrated Library Systems
Struggles (AKA, The Fire Swamp): Three Different Integrated Library Systems

- Three ILSs used in project:
  - OCLC Worldshare Management System (WMS) - Claremont Colleges Library & Pepperdine
  - Innovative / Sierra - Loyola Marymount University
  - SirsiDynix Symphony - University of Southern California

- Answering the question, “Was a title used within the last five years?” proved to be especially difficult for each of us

- Issues accessing historical data
Struggles (AKA, The Fire Swamp): Institutional Considerations

- SCELC a unifying factor, but each institution had its unique qualities, which were revealed over the course of this project and affected the results
- Claremont Colleges: Unique organizational structure
- USC: R1 Doctoral university (highest research activity), graduate programs in the arts
- Pepperdine & LMU: Similar size, focus, missions
- Claremont & LMU: Similar collection sizes & budgets
- Pepperdine & Claremont: Same ILS (OCLC WMS)
Struggles (AKA, The Fire Swamp): Research Parameters

- Our project analyzed use of collections we had in common, but not specific titles. We could have focused on the overlap in collections at our four institutions.
Struggles (AKA, The Fire Swamp): Mental Bandwidth

Key: Avoiding burnout from the research process

How?

- Embracing research creativity and experimentation
- Most of us are free from tenure deadlines
- Using experiences as teachable moments for professional growth
Choose Your Adventure:

Should we carry on with the project?
Choose Your Adventure: Should we carry on with the project?

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<th>Page 59</th>
<th>Page 5</th>
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<tbody>
<tr>
<td>Press on.</td>
<td>It’s time to abandon all hope.</td>
</tr>
<tr>
<td>Merge all the data!</td>
<td></td>
</tr>
</tbody>
</table>
Press on!

But... remember all of these research questions? (So many questions!)

- What is the relationship between e-book usage in Art & Architecture and that in the print collection in the same call number range(s)?
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- Is it possible to generalize trends in e-book usage in Art & Architecture, or is there too much variability among institutions?
Press on!

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**Drawing Comparisons**

Analyzing Art & Architecture Print and E-book Usage

**Institutional Demographics & Collections**

<table>
<thead>
<tr>
<th>Institution</th>
<th>Student Population</th>
<th>Faculty</th>
<th>Library Collections</th>
</tr>
</thead>
<tbody>
<tr>
<td>University A</td>
<td>10,000</td>
<td>100</td>
<td>10,000</td>
</tr>
<tr>
<td>University B</td>
<td>20,000</td>
<td>200</td>
<td>20,000</td>
</tr>
<tr>
<td>University C</td>
<td>30,000</td>
<td>300</td>
<td>30,000</td>
</tr>
<tr>
<td>University D</td>
<td>40,000</td>
<td>400</td>
<td>40,000</td>
</tr>
</tbody>
</table>

**Methodology**

To develop our dataset, we exported and merged holdings with usage data (2010-2015) from each institution with the following parameters:

- **Art & Architecture Print**
  - Report holdings and usage data in the following types:
    - LC Call Number
    - Circulation (including checkouts, holds, and checkouts in progress)
    - Title
    - Author
    - Publisher
    - Date of publication

- **Art & Architecture E-books**
  - Report E-BOOK Holdings and usage data in the following categories:
    - Title
    - Author
    - Publisher
    - Date of publication

**Results**

- **Chart A**: Average usage by IC Class
- **Chart B**: Average usage by IC Class

**Research Questions**

- In the Art & Architecture number range (H-H and P-H), what is the relationship between print and e-book usage?
- How do the following variables affect usage?
  - IC class/subject within the library
  - Publisher
- Can we generate an overall usage based on our aggregate data, or is there too much variability between institutions?

**Conclusions**

Comparing print and average usage data from 130,000+ books reveals surprising insights.

- Despite this, we were able to identify several patterns:
  - Usage "trends" by IC Class
  - Usage "trends" by Publisher

In our combined dataset, we identified 200 titles with overlapping holdings in both print and e-book, with the vast majority in the Visual Arts (IC class [H]).

- Many print books tend to be on more general topics, while most e-books focus on more specific, research-based topics.

**Further Questions**

- What might we learn by further analyzing the ratio between print use (click) and e-book usage (downloads)?
- How can the findings from our collaborative project be translated to our individual institutions?
- How can we leverage and utilize institutional usage data with aggregate data?
- What might we learn about format preference (e.g., "trends") by analyzing the usage for titles owned both in print and e-book?
- What might we account for the lack of overlap between the most-used print and e-book titles?
- What can we learn from looking at these results alongside turnover data for the collection?
Choose Your Adventure: Write the Article?
Choose Your Adventure: Write the Article?

<table>
<thead>
<tr>
<th>Page 32</th>
<th>Page 48</th>
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<tbody>
<tr>
<td>Yes - we made it through the fire swamp - we should definitely keep going with this project.</td>
<td>We have so many other things on our plates.</td>
</tr>
<tr>
<td>Back to Google Docs - let’s go!</td>
<td>No thanks, not now!</td>
</tr>
</tbody>
</table>
We wrote, and submitted the article.

“Unfortunately, I think you may have taken too big a bite.” - Reviewer #2
“I do think there is a remote possibility that you could drastically rewrite this article”

“To start with, what was it you were comparing?”

“I would strongly recommend you include an art librarian”

“I have a lot of sympathy for how difficult this turned out to be”

“I still think the concept is good, and solidly researched this would be a tremendous study”
Choose Your Adventure:
RE-write the Article?
Choose Your Adventure: RE-Write the Article?

<table>
<thead>
<tr>
<th>Page 93</th>
<th>Page 66</th>
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<tbody>
<tr>
<td>We guess so.</td>
<td>No. We’re over it.</td>
</tr>
<tr>
<td>Back to the drawing (comparisons) board.</td>
<td><em>But maybe there’s another path somewhere...</em></td>
</tr>
</tbody>
</table>
We chose NO

- Re-frame the project
- Reflect, re-group mindfully
- Don’t worry, we are still writing an article!
Recommendations...(almost the final chapter)

- Why collaborate?
- Scope of your research and “scope creep”
- Think like a project manager
- Label people!
What adventures do you have in store?

What will you choose?
Share Your Adventures

- Has your ILS stopped you from doing a project that you wanted to do/that would benefit your library?
- How many of you have had experiences similar to those discussed in our presentation?
- How many of you are interested in collaborating in a multi-institutional collection assessment?
- Has collaborative assessment made an impact/led to a specific decision?
Keep in touch!

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