End Users/Use Statistics
Moving the Library: Bringing Resources to Students (Using a Learning Management System)

Karen Venturella Malnati, Acquisitions Librarian at Union County College

Steven Shapiro, Electronic Resources Librarian, Montclair State University

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Abstract

Students are increasingly finding library resources online due to the explosion in online courses and the use of course management software for all courses, whether fully online, hybrid, or traditional face-to-face courses. Librarians from Union County College (a two-year community college) and Montclair State University (a large research library) discussed the various approaches used to promote and market library services and resources using their institutions’ library management system (LMS). A representative from Gale Cengage presented how Gale is connecting library content to the classroom while helping libraries raise their profile on campus.

Promoting Library Resources in Canvas (Union County College)

The Union County College experience was presented by Karen Venturella Malnati. The presentation focused on the library’s use of Canvas to promote library resources to teaching faculty. The philosophy is in telling the teaching faculty about library services and resources that can be shared in Canvas the teaching faculty will in turn encourage students to use the library resources. Libraries need to spread the word on what exists as well as simple directions on how to provide links in the LMS to the resources. Ways the Union County College is using the LMS to bring resources to students include an embedded librarian program, demonstrations to faculty on how to provide links in their online course shells to e-book chapters, scholarly articles, LibGuides, and streaming videos. A one credit course titled “Methods in Library Research” is offered to students to emphasize the importance of developing information literacy skills.

Various methods have been used to reach faculty such as speaking at faculty professional development workshops on topics such as “library tools for student success” and “the embedded librarian program.” Giving a presentation at adjunct orientations has been a way to reach a large group of new faculty members to let them know about library services and resources. Canvas conferencing has been a tool to reach faculty who predominantly teach online to demonstrate how to link to library resources in Canvas.

Creating a Library Community in Blackboard (Montclair State University)

The second presenter, Steven Shapiro, electronic resources librarian at Montclair State University, discussed another way of embedding the library in an LMS by creating a community (group forum) in Blackboard, which supports such functionality. Communities in Blackboard are similar to courses, allowing you to post announcements, documents, and multimedia as well as send e-mails, conduct asynchronous discussions, and perform a host of other activities. At the same time, both require members to be enrolled by a system administrator or leader/teacher. While the community can be an effective tool for marketing the library to faculty, students, and staff, it is particularly well suited for connecting with students. Academic libraries, such as Montclair State University, usually have many methods for communicating with faculty, including listservs, liaison programs, campus-wide committees, and working relationships. On the other hand, there are fewer methods for communicating with students.

At Sprague Library at Montclair State University, the original strategy for reaching out to students consisted largely of using the library website, social media, and library instruction. Unfortunately, these methods of communication tend to be passive depending on the
students to come to the library’s website or Facebook page. The staff wanted to try something less traditional but also more embedded in the virtual environment frequented by students. Montclair’s LMS at the time, Blackboard, seemed to be the appropriate place to establish a library presence. The goal was to create a platform for more aggressively disseminating information about the library.

In the spring of 2011, the Blackboard system administrator created the library community entity and designated a leader (Steven Shapiro) to create content areas, which include text and links, or tools (e.g., announcements). Everyone with a Blackboard account (all students, faculty, and staff) was batch enrolled into the community. After that, batch enrollment would take place once a year (initially it was twice a year) to add any new Blackboard accounts. This meant that over 18,000 individuals were registered for the community.

The primary purpose of the library community was to publicize resources, services, and programs while also providing a fun and entertaining side to attract and keep our target audience, students. When students logged into Blackboard, library community announcements appeared by default on the main page in a box labeled “My Announcements.” If they selected the community tab from the interface and then entered the library community, they could also view “Library Announcements” as the initial screen or menu item. Announcements usually consisted of news items focusing on new resources, events, workshops, faculty or staff achievements, changes in library hours, and/or new services.

Other sections or menu items created included “Library Info,” which listed quick facts (e.g., updated hours and information on popular services such as laptop loan) that addressed student needs; the “Featured E-Resource,” which profiled underutilized or new e-resources; “Librarian Spotlight,” which provided a personalized and up-close bio of a librarian or staff member; the “Newsroom” section that was devoted to freely available Internet resources and digital collections; and the “Library Trivia” section that contained items to test students’ knowledge of Sprague Library’s collection and the library world. In addition, a “Discussion” section was established for any future asynchronous Q&A sessions.

The marketing impact of the community was enhanced by the ability to text and e-mail announcements to mobile devices. This was accomplished by using the University’s RAVE cell phone alerting service to relay messages from Blackboard via a “building block,” enabling the LMS to communicate with RAVE. All students needed to do was to register on the MSU phone apps site to receive library community announcements as either text messages or e-mails on their mobile device.

Usage statistics generated upon completion of the community's first semester in existence (spring 2011) were encouraging. There were over 3,200 page views during this time. The menu items most visited were Announcements (1,895 hits), Library Info (333 hits), the Newsroom (275 hits), Library Trivia (201 hits), Featured E-Resource (173 hits), and Librarian Spotlight (137 hits) (Shapiro, 2011).

After the university migrated to the Canvas LMS, one of Montclair’s librarians created a community called “Academic Research Explained,” which gave faculty the ability to incorporate library research instructional content, including tutorials, into their Canvas courses by simply copying and pasting. Moreover, faculty didn’t need to use entire content modules within the community but could select those portions pertinent to their course. Over 40 faculty from the first-year writing program belong to the community, and the library intends to expand access to a larger number of academic departments.

Sprague Library is also experimenting with a library portal that was created on the campus engagement network provided by OrgSync. The MSU network is referred to as HawkSync and is utilized by members of student organizations including the student government association (SGA), fraternities, sororities, clubs, and other groups. Like the original library community, the portal includes announcements, news items, video clips, and information about library programs and services. Content added to the site can also be emailed to portal members.

Gale Cengage as a Library Partner and Advocate (Sara Tarpley)

Sara Tarpley, the third presenter, discussed Gale Cengage’s role as a library partner and advocate who continually analyzes the trends and behaviors of not only libraries but faculty practices and student preferences. Monitoring these trends and practices helps Gale define a product development strategy to
ensure it is building tools and resources that are commensurate with ways that libraries can continue to enhance the value they bring to their institution. Gale has done a great deal recently in developing tools and resources that can empower learning outcomes through the library.

"In 2015, Gale conducted a survey with Library Journal to better understand the relationship between academic faculty and librarians. The survey of roughly 500 academic librarians and 500 faculty revealed just how big the gap is. The numbers themselves are eye-opening, with a little under half of faculty (49%) indicating that they embed library resources or links into their LMS or syllabus. In addition, 27% of faculty think that there is no need for campus librarians and faculty to consult with one another” (Mason, 2016).

"Up against perception challenges like this, it’s clear that libraries need to continually show faculty and administrators how they support better learning outcomes, and one specific way to do this is to show how the content the library has can directly support in class instruction and discussion” (Mason, 2016).

The tools and products Gale develops are increasingly designed to mimic the patterns and needs of faculty and students and include capabilities to increase collaboration between librarians and faculty across campus. Examples of such tools include Gale Researcher, a curriculum tool that fosters the development of information literacy and critical thinking skills by providing students with a clear path to research materials aligned to the scope and sequence of general education courses, as well as our partnerships with Google and Microsoft, and finally joint initiatives in higher education with our parent company Cengage Learning, who is a leading textbook provider.

Gale Researcher not only provides a clear research path for students who are sometimes overwhelmed with starting their research, but it also provides the ability to support faculty who are looking to embed digital resources into the classroom via their learning management system. Blocks of content from Gale Researcher are easily able to be embedded as web links via durable, bookmark URLs. Further, designed within the resource is an opportunity for librarians to work with faculty to customize Gale Researcher to incorporate documents, links, open access materials, and videos that instructors might utilize regularly as part of their teaching practice. This customization is available to help further cement collaborative relationships between faculty and the library and thereby promotes the value of the library in support of curriculum design. Because Gale Researcher is so closely aligned to the learning objectives of the most highly enrolled courses on campuses across the United States, it is likely that the materials held within could support open educational resources initiatives on campuses whose definition of such programs include limited-restricted content such as library subscription databases, thus making learning opportunities more affordable and increasing students’ academic success.

Ultimately, though, Gale is keenly aware that it is not enough to simply design content aligned to curriculum. Gale has also incorporated workflow tools that mimic the student and faculty members’ natural workflow. An example of this is our partnerships with Google and Microsoft, in which we have designed sign-ins within our library resources to encourage classroom utilization. Instructors can leverage Google Classroom, an open-source learning management system, to assign documents from our research solutions. Students and faculty have found tremendous value in leveraging their campus-based Google or Microsoft accounts to inspire collaborative research projects. Students may continue to use these research tools as they matriculate into the workforce after college.

A Cengage Learning Fall 2015 Engagement Insights Study also indicates that students want library resources more closely embedded in their courseware. Gale has established a way to bring library content to the student by allowing library resources to be accessed through Cengage Learning’s MindTap. MindTap is a personalized learning program of digital products and services that engages students with interactivity while offering students and instructors choice in content, platform, devices, and learning tools.

As a strong advocate for the value that libraries bring to the learning process, Gale will continue to enhance solutions to empower learning. Gale seeks to make library solutions that can be easily integrated into the classroom. With this alignment of research and content to curriculum, libraries may benefit with increased usage of collections, stronger relationships with faculty and administration, and an improved perception of value of their services on
Faculty will have an opportunity to bring more scholarly material into their courses and student workflow. The goal is for students to interact with quality research materials earlier and more often, promoting critical thinking and discovery.

Conclusion

These different approaches share the goal of aiding students’ research efforts. As students are increasingly using an online LMS to access courses, it is critical that libraries reach out to students and faculty in their LMS and for library vendors to provide research material that can be accessed and integrated into the LMS. According to the ACRL Standards for Distance Education (2016), “Academic libraries must . . . meet the information and research needs of all constituents, wherever they may be.” Now that students are increasingly online, it has become crucial for libraries to reach students using their institution’s learning management system. This panel focused on various ways to bring resources to students in their LMS as well as to promote and market library resources.

References


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Liaison Librarians in the Know: Methods for Discovering Faculty Research and Teaching Needs

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Abstract

Libraries constantly seek information from their faculty partners on what, precisely, is needed from the library to support their teaching and research needs. This paper uses a case study from the University of South Florida (USF) as a framework to explore methods for determining the curriculum and research needs of faculty across disciplinary boundaries and ways for promoting library resources and services to departments across campus. Using syllabus analysis, website analysis, focus groups, and interviews, this project sought to evaluate faculty needs without relying on surveys. The data gathered from this case study will allow the liaisons at the University of South Florida to better serve and support the evolving needs of faculty and will also provide a framework and methodology for liaisons at other institutions to determine the specific needs of faculty at their universities.

Introduction

At the 2014 Charleston Conference, a panel of faculty members spoke on “What Faculty Want Librarians to Know” (Fair, Johnson, Richerme, & O'Donnell, 2014). In this plenary session, each faculty member discussed the challenges faced when trying to conduct research at university libraries, with the hopes that the audience (composed primarily of librarians) would take heart and action. The takeaways from this session align with what libraries know about faculty needs from standardized assessment metrics such as LibQUAL+ and Ithaka (e.g., Jones & Kayongo, 2008): Faculty need access to information sources across an increasingly broad range of disciplines and topics, and barriers to access, be they paywalls or restricted access via reading rooms, are problematic.

Large-scale surveys of university faculty, however, are perennially unpopular, particularly for the faculty who are asked to respond to them; low response rates are common, and representative response rates are difficult to come by, leading to potentially skewed results (Thompson, 2000). Further, marketing research suggests that both faculty and students in American higher education institutions are constantly surveyed on every aspect of their lives, leading to survey fatigue and thereby compounding problems with representative response rates (Groves et al., 2009; Porter et al., 2004).

In order to avoid the common pitfalls associated with surveying vast numbers of faculty members, the University of South Florida began a year-long project to investigate the diverse needs of faculty members across disciplines, encompassing both curricular and research support. This year-long project sought to pull from existing datasets as well as develop new methodologies for gathering data from a variety of sources in order to better inform the USF liaison model. Among these, two teams were formed in order to address both the curricular and research needs of faculty. Each team was tasked with identifying key questions or concepts to address and to develop a methodology for gathering both quantitative and qualitative data to answer questions and offer insight into departmental needs across the USF campus.

Measuring Faculty Needs From the Library at the University of South Florida

The University of South Florida (USF) is a large, publicly funded state institution, with its main campus located in Tampa and separately accredited campuses located in St. Petersburg and Sarasota. In 2016, over 40,000 students enrolled at the Tampa campus of USF at the undergraduate or graduate level, and instructional faculty members numbered 1,790 (USF, 2016). One main library on the Tampa campus serves all of the university, with the exception of USF Health, which has a separate library facility. The Tampa campus library employs a lean
liaison model, with 13 liaison librarians (where “liaison” is defined broadly to include librarians with other primary duties, such as copyright and resource sharing or special collections) for these 40,000 students and 1,790 faculty members.

Given its lean liaison model, it is imperative for the USF Tampa Library to know what the faculty at the institution need to support their teaching and research. Like libraries at many academic institutions, USF has participated in campus-wide surveys, including LibQUAL+™ and, most recently, the Ithaka S+R faculty survey in 2015. While large-scale assessment surveys such as these are crucial for institutional decision making, they are impractical for gathering continuous data to inform day-to-day activities and support. Therefore, we sought methods for gauging how the library could help meet the research and teaching needs of faculty across a wide range of disciplinary boundaries without relying on survey responses.

The case study offered in this paper derives in part from a year-long process to re-envision liaison service models at USF. As part of this process, two committees were tasked with creating methodologies for assessing faculty needs of the library; the curriculum committee was charged with assessing needs to support teaching and learning activities, while the academic needs committee was charged with assessing library support required for research.

**Measuring Curriculum Needs**

The curriculum committee was charged with gathering and analyzing data regarding the presence of information literacy skills within colleges and departments at USF. As part of this process, two committees were tasked with creating methodologies for assessing faculty needs of the library; the curriculum committee was charged with assessing needs to support teaching and learning activities, while the academic needs committee was charged with assessing library support required for research.

While many institutions maintain a central, publicly accessible repository of syllabi to facilitate the assessment of transfer credits, USF does not; syllabi instead typically reside in departmental archives. In order to access syllabi, the curriculum committee worked with USF IT to obtain read-only access to syllabus files in Canvas, the university’s course management software. We used a three-pronged approach to gather syllabi. First, we targeted high-enrollment degree programs to pilot whether this approach would work. After the pilot’s success, we turned to courses that satisfy general education requirements, since information literacy is a key dimension of USF’s general education program, and all undergraduate students take a subset of these courses. Finally, after completing these smaller studies, we embarked on a large-scale review of the curriculum requirements of all degree programs at the undergraduate and graduate level at USF.

The workflow the committee created is not foolproof: The list of degree programs and course requirements were harvested from department websites, many of which are out of date. As noted above, not all syllabi are created equal. Some contain much more information than others, and some courses do not even have a syllabus loaded in Canvas, despite a university policy. It does, however, provide a workable solution to the problem of needing access to current information about the institution’s curricular requirements, and it helps ensure that our data sample is representative of the full range of departments and disciplines represented in the curriculum.

**Measuring Research Needs**

In addition to gathering data on faculty’s instruction needs, this project sought to establish methodologies and processes for determining how the library might meet faculty research needs across disciplines. The academic needs committee was tasked with gathering qualitative data that speaks to the research needs of departments and colleges as well as other units on campus such as institutes, labs, centers, and interdisciplinary units. The primary challenge for this activity was that no unified or strategic method for gathering qualitative data about faculty’s research needs across disciplines existed at USF before this project began. Naturally, reviewing faculty curriculum vitae (CVs) allowed for individual liaisons to gather data on the research
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needs of particular faculty members; however, the larger project sought to gather a broader sample from which to make decisions about collection development and the library’s role in faculty research support.

Short of interviewing the roughly 1,800 individual instruction faculty members who work at USF, this subcommittee worked to create a plan and set of methodologies that provide the greatest impact without overtaxing the workload of its five members. Specifically, the academic needs committee began its project by gathering data first from existing web sources (e.g., departmental websites) before moving on to a more time-intensive approach.

To normalize the data gathered from departmental websites, the academic needs committee developed an online form for assessing various aspects of each website using the same criteria (see Appendix A), choosing a randomized sample of five departments from the College of Arts and Sciences (CAS), USF’s largest college, in order to test a proof of concept before moving on to the entirety of the university. In addition to being the largest college at USF, CAS houses the School of Humanities, the School of Social Sciences, and the School of Natural Sciences and Mathematics. The academic needs committee chose this college to test its proof of concept given the diversity of departments and broad representation of faculty across disciplines within CAS.

Unfortunately, given the array of departmental websites that had been developed without a uniform set of standards, this method proved less effective than anticipated. Specifically, many departmental websites led with outdated information or left large gaps of information, including missing faculty lists, no references to grants or awards, and no specification of particular research interests within the department. Therefore, the committee decided to remove this aspect of the methodological approach for determining faculty research needs from the overall plan.

After the departmental website scrape proved unfruitful, the academic needs committee considered what additional information was needed to flesh out the picture of research needs at USF. To this end, the committee developed a list of questions both for the committee to investigate as well as those which could be directed toward various colleges within the university, the answers to which would determine where gaps in support existed.

First, these questions were developed on a general level in order to assess many facets of the overarching charge and, upon reflection, then broken into categories based on audience. Specifically, questions targeted audiences in administration, department chairs, faculty groups, and for the committee itself (see Appendix B). These questions evolved over the semester, breaking away from the library-centric approach and morphing into a more faculty-oriented question set. In order to test our proof of concept for informational interviews, the academic needs team focused on key individuals within CAS, including the vice provost for student success, the associate dean of the office of graduate and undergraduate studies, and the chair of the philosophy department before advancing on to other administrators, chairs, and faculty members. This is an ongoing process, and the academic needs committee is currently in the process of determining which departments to approach next as well as is working to develop faculty focus groups to gather data on a more granular level.

Results and Actionable Items

This project resulted in the accumulation of massive amounts of data, some of which is still under review and analysis. Both committees, however, have begun to identify trends and patterns that will affect liaison services at USF.

Trends Identified

Undergraduate courses appear to be moving away from the traditional research paper and requiring more project-based and service learning opportunities. Therefore, the traditional information literacy components that librarians have historically helped support are now evolving into projects that may not require extensive research or even utilize any library resources. The data has also suggested departments and programs that require library-intensive projects and papers of its students with which liaison librarians do not currently have strong relationships; this assessment, therefore, provides information to support targeted outreach. Furthermore, the informational interviews conducted reveal that various campus-wide
initiatives impact the research and instructional needs of faculty across departments. Specifically, the university’s emphasis on student success, including a focus on freshmen retention rates, student persistence, and the six-year graduation rate, has heavily influenced a restructuring of courses across departments. Additionally, USF’s Global Citizens Project has become an integral component of core classes. As a result, classes across departments are now required to contain at least one major project that ties into global citizenship, and the library needs to assess its collections and services in light of these changes.

**Action Items Identified**

Given the larger trends that are shaping the evolution of course development and faculty research at USF, the library has identified a series of steps it can take in order to better support faculty through this transition.

This project revealed that liaisons need to make a concerted effort to tap into campus-wide initiatives, such as textbook affordability and student persistence. This may come in the form of partnering with various nonacademic units to find new avenues for providing outreach to students struggling to afford textbooks or attempting to find proper and effective sources for conducting their research. Additionally, as the university transitions to offering more and more classes online, the library can develop an online toolkit for supporting faculty as they transfer content to the online sphere. This may include tapping into Canvas courses in order to develop research modules and online learning objects to replace the traditional face-to-face one-shot.

Further, additional perspectives are needed to inform the library’s understanding of faculty research needs, and the library will continue working with faculty and chairs in order to assess department-wide research needs across disciplines. Indeed, although the initial round of interviews led to various vital pieces of information, it became clear that the view from the top was focused more on instruction and student success despite the specific questions designed to elicit information about research needs. The academic needs committee anticipates that faculty focus groups will provide more data regarding these specific research needs, however, which will allow the liaisons to respond on the departmental and individual level.

**Next Steps**

As librarians, we recognize that understanding faculty research and teaching needs is an ongoing endeavor that must be repeated throughout our time serving various departments. This project was large scale, but the librarians at the University of South Florida hope to adapt it to inform the smaller scale through the ongoing process of data collection going forward.

In the meantime, the members of the curriculum and academic needs committees are working to answer several primary questions to arise from this project: How do we share all this information with our administrators, chairs, and faculty, and students? How do we incorporate these insights into our daily work? And how do we ensure that we are meeting the current research and instruction needs of our faculty?

To begin, we are restructuring our existing liaison program in order to provide a more consistent level of service across departments, including evaluating our instruction program to see how we can better support faculty in research-intensive courses. We are also rolling out new marketing and outreach strategies that are informed by this data, including revamping our new graduate orientation program through partnership with other on-campus organizations. Specifically, we tapped into the departmental demographics of our new students and created tailored sessions and handouts for these audiences that provided information to support graduate students both as students and as instructors.

Rather than simply hoping that library resources and services effectively support the diverse needs of faculty and students, this methodology allows the librarians at the University of South Florida to systematically evaluate trends in teaching and research in order to adjust support and services in accordance with current faculty needs.

**Conclusion**

As liaison librarians, it is our duty to recognize the diverse needs of our faculty and students and to respond to those needs with the proper support. In this ongoing process, it is necessary for liaison librarians to develop an action plan for assessing the
needs of their subjects during the tenure of their liaisonships. Although developed to serve the population at a large, research university, the methodologies outlined here could be easily adapted for gauging faculty needs for research and instruction across different disciplines at other institutions. We anticipate that these techniques will allow the library liaisons at the USF Tampa Library as well as librarians at other institutions to better support academic units even as they pursue new and emerging practices within their disciplines.

References


Appendix A: Departmental Website Evaluation Form

- What are the areas of specialization for the department (particularly for PhD students)?
- What areas of research can you identify with regard to the department? The PhD program?
- What are the specific curricular areas of concentration in the doctoral program?
- What collaborations with other units on campus are highlighted?
- What news items are featured on the front page?
- What activities are unique to this department compared to others?
- How many regular faculty are listed on the website? How many research faculty? How many visiting faculty? How many postdocs? Affiliated faculty? Courtesy faculty?
- What information is available about research awards (national level) and grants?
Appendix B: Academic Needs Guiding Questions

For Administrators

1. What are the research needs of tenure earning faculty? Of instructors? Of adjuncts?
2. How are research needs changing? What are the challenges faced by faculty? Adjuncts? Students?
3. What do faculty perceive as the educational gaps in their students and the needs of their adjuncts and colleagues?
4. How could the library support pre-eminence?
5. How do you feel the faculty would like to receive information from the library?
6. What data points determine the success or failure of a department?

For Chairs

1. What are the research needs of tenure earning faculty? Of instructors? Of adjuncts?
2. How are research needs changing? What are the challenges faced by faculty? Adjuncts? Students?
3. What are the unique differences in research needs between yours and other disciplines?
4. What frustrations do you perceive your colleagues struggling with in relation to teaching and research?
5. What are the obstacles your students face in finding information and conducting research?
6. How do you feel the faculty would like to receive information from the library?

For Faculty

1. What do you perceive as the educational gaps in your students’ research, writing, and information skills?
2. What are the obstacles your students face in finding information and conducting research?
3. What are the unique differences in research needs between yours and other disciplines?
4. What are the obstacles you face while preparing instruction and/or conducting research?
5. What frustrations do you perceive your colleagues struggling with in relation to teaching and research?
6. What are the most important resources you need for your research?
7. How do you select external partners for grants? Do you seek out other USF units/colleges?
8. Does your research inform your instruction or vice versa?
9. If you had more time, what resources and services would like for your instruction or research activities?
10. How can the library support your research and instruction?
11. How do you hear about library services and resources?
12. How would you like to receive information from the library?
13. Should your department have an academic librarian liaison?

For Committee

1. How do we find out what the faculty needs are?
   a. Look at currently available qualitative information.
   b. Meet with administrators for informal talk about their perceptions of departmental needs.
   c. Ask faculty directly.

2. What is the makeup of the faculty at USF?
   a. Ask data gathering and analysis committee’s information.
   b. Check USF Info Mart.

3. What current qualitative data about faculty trends/needs is available to us?
   a. Ithaka.
   b. LibQUAL.
   c. Articles on similar research studies.
   d. Department and faculty websites.
4. What level of input should we seek first (administrators, department chairs, faculty, etc.)?
   a. Administrators first.

5. How do we find out recent trends in colleges and departments (the trajectory of the department)?
   a. Ask administrators and faculty.

6. How do we identify differences in user behaviors among the disciplines?

7. How do we create relationships in order to have conversations about curriculum needs?

8. How do we identify gaps in what the library offers compared to what the faculty and students need?

9. How do we determine the needs of nonlibrary users?

10. Which colleges/departments/programs are heavy library users, and which are less dependent on library resources?

11. How do we identify departments that seemingly are afraid to ask for library assistance?

12. Are there inequities of library support because of lack of liaison coverage?

13. Are their inequities of library support because of lack of department interest/understanding of the library?

14. How are we best going to communicate information to our departments?
Strengthening Regional Collections One Request at a Time: Using Resource Sharing Technology to Facilitate Coordinated Collection Development

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Abstract

There can be many barriers for success in Coordinated Collection Development (CCD) projects. Delivery and ownership are major concerns, and libraries are committing institutional funds, often to contribute to group or consortial collections, which requires trust and a consistent measuring of whether the CCD venture is a good use of scarce collection dollars. CCD efforts often require advance agreement on policies, collection areas, and dedicated funds, which can lead to decreased overall satisfaction. In many CCD projects, mutual trust is not built through a shared practice and workflow that allows for choice and data-driven decisions but is established through CCD agreements that are often complex and difficult to adjust. To address as many areas as possible that can prevent success with CCD ventures, the IDS Project and St. John Fisher College created a CCD tool that focuses on building diverse group collections through communication and efficient workflows connected to resource sharing and demand-driven acquisitions. Key to the project is finding how to most effectively share relevant information and provide opportunities for building diverse collections while also ensuring that purchased items fit local collection needs. Using real-time consortial and institutional resource sharing data, libraries could know what items are being requested that fit the institution’s desired areas to build collections. The goal of the program is for libraries to use real-time information to purchase titles that fill user demands across a consortium, leading to more diverse collections and stronger and more flexible CCD projects.

Introduction

When focusing on cooperative or collaborative collection development (CCD), there can be many barriers for success, especially with print materials. Delivery and ownership are major concerns, and libraries are committing institutional funds, often to contribute to group or consortial collections, which requires trust and a consistent measuring of whether the CCD venture is a good use of scarce collection dollars. In addition, data about group-wide resource sharing requests, group-wide ownership, and whether items are in subjects of collection need are often not available in a timely manner. CCD efforts often require advance agreement on policies, collection areas, and dedicated funds, which can lead to decreased overall satisfaction with the project. In many CCD projects, mutual trust is not built through a shared practice and workflow that allows for choice and data-driven decisions but is established through CCD agreements that are often complex and difficult to adjust.

To address as many areas as possible that can prevent success with CCD ventures, the IDS Project and St. John Fisher College created a CCD tool that focuses on building diverse group collections through communication and efficient workflows connected to resource sharing and demand-driven acquisitions. Key to the project is finding how to most effectively share relevant information and provide opportunities for building diverse collections while also ensuring that purchased items fit local collection needs. Using real-time consortial and institutional resource sharing data, libraries could know what items are being requested that fit the institution’s desired areas to build collections. The goal of the program is for libraries to use real-time information to purchase titles that fill user demands across a consortium, leading to more diverse collections.

About the CCD Project

Through the use of a common software platform, IDS Logic, the resource-sharing requests and all related data for all IDS Project consortia members are gathered on a nightly basis and can be used to provide near real-time resource sharing usage data. In addition, the resource-sharing data can be used to conduct dynamic queries against live interlibrary loan (ILL) requests, so that if a library wants to use the resource-sharing data to automate decisions for acquisitions or CCD, the data is available and responsive enough to communicate with ILLiad to
facilitate enhanced resource sharing workflows. In addition, IDS Logic as a platform connects with many different Web services to pull relevant data about resource-sharing requests, and it can pull data from external systems or data such as total ILL requests across a group to help staff make data-driven decisions. For the CCD Project, the IDS Logic platform pulls all ILL book requests and then uses the Worldcat Search API to determine IDS Project group and local ownership, checks what libraries have indicated they would like to collect in areas related to the call numbers of requests, and also pulls the number of ILL requests placed both locally and within the IDS Project within the last year. Finally, since relying on checking single ISBNs or Online Computer Library Center (OCLC) numbers would lead to inaccurate data about ownership and ILL requests, the CCD tool within IDS Logic uses the OCLC ISXN and Worldcat Search APIs to pull all ISBNs and OCLC numbers related to the requested edition of a book, and it uses these variant ISBN and OCLC numbers to perform highly accurate searches of resource-sharing request volume and ownership. As many books have dozens of associated ISBNs and OCLC numbers associated with single editions, linking the different unique identifiers is essential to accurate CCD activities and analytics.

CCD Background in New York State

New York State libraries are poised for further library CCD activities. A long-standing New York State regulation and grant program, Coordinated Collection Development Aid or CCDA (http://www.nysl.nysed.gov/libdev/ccda/index.html), provides funding for New York libraries to purchase materials in specific areas that will diversify collections. The Empire State Library Network (https://www.esln.org/) regional councils oversee the program to facilitate subject agreements. Individual libraries use funds to build specialized collections that will benefit the whole through mandated availability of items through resource sharing. A state-wide courier system, Empire Library Delivery, provides quick shipping of physical materials for a single annual flat rate. The large 64 campus State University of New York (SUNY) system has a strong culture of coordinated collecting, and the IDS Project serves to connect most of the SUNYs to private university libraries throughout New York. Additionally, there is a shared print program, Empire Shared Collection (http://empiresharedcollection.org/). The interest, infrastructure, networks, and structural connections exist in New York. Providing tools to facilitate decision making will help New York libraries expand collections and access.

The IDS Project is a growing library cooperative that has, for the past 15 years, focused on bringing advances to libraries that cross the boundaries of departments. Although the IDS Project has remained focused on resource sharing, building collections collaboratively and integrating purchase-on-demand and collection development into resource-sharing workflows has been a key component of IDS. Most notably, the IDS Project created the Getting it Systems Toolkit (GIST). Through customizations of the ILLiad software product, GIST allowed libraries to factor in group ownership, collection strengths identified through a conspectus, and purchase availability and cost information, all in one interface (Pitcher et al., 2010, p.226). The CCD project sought to take the spirit of GIST, add in additional information (including resource sharing data, aggregate conspectus information for the group, and alternate edition checking), and allow other libraries to see this information cooperatively. Where GIST worked well for a single library, the CCD project can work well as a selection tool to allow for better data-driven purchasing by groups.

Literature Review

Existing coordinated collection development activities take many different forms. Some CCD programs rely heavily on effective resource sharing for success, while others rely on prospective collection building. There are often hybrid approaches in which access, collection building, and local and group needs are balanced. At the center of all approaches to CCD is a need for effective communication, methods to build and sustain trust, and tools for efficiently making decisions.

Successful cooperative collections based on effective resource sharing such as those facilitated through the Borrow Direct program still find obstacles to success, such as “no single library wants to be the first to appear to be ceding their collecting duties to outside entities, even (or perhaps especially) peer institutions. Overcoming this taboo requires collaboration, communication, and information.” (Collins, 2012, p. 102). For Collins (2012, p.103), “[t]he prospect of cooperative collecting must be founded on a reliable resource sharing system, but collection development requires more than just
library-to-library transaction data,” and he cites Metridoc as a system that will help integrate all the data points that will help those interested in CCD make informed decisions, such as ILL and circulation transactions in addition to catalog searches, database and journal usage, course offerings, and other information.

Obstacles to CCD have long been ingrained in “institutional competitiveness” and the “desire for autonomy,” which Deborah Lynn Jakubs (2015, p. 655) indicates were issues considered when the RLG Conspectus system was established, and which are challenges with larger CCD ventures. Jakubs (2015, p. 661) further asserts that “[t]o be successful, collaborative collection development should build in flexibility and adaptability.” Kinner and Crosetto (2009, p. 428) identify one challenge with consortial or group activities among libraries, which is that “as long as libraries have participated in collaborative endeavors, when faced with the possibility of giving up autonomy and funds, the spirit of collaboration and actual participation becomes challenging.”

To engage in CCD where libraries identify areas to collect, a certain knowledge of its collections is essential. Libraries should evaluate their collections and curriculum, which “allows the individual library to be a more effective partner in any resource-sharing venture” (Kinner & Crosetto, 2009, p. 421). Two major issues with the collection building approach to CCD are balancing the interplay between the local and the group collection and determining the best method to develop an understanding of the most effective use of funds to continue to develop collection strengths. When libraries join consortia and share collections, “individual libraries can focus on the unique needs of the local curriculum and research” (Kinner & Crosetto, 2009, p. 425).

There are also a variety of hybrid approaches to CCD, and many libraries indicate that they participate in multiple CCD activities with different goals for each program. Booth and O’Brien (2011, p. 149) identify three major approaches to CCD, with one popular model identified as the demand-driven or patron-driven model, in which local and group ownership are factored in addition to comparing the item to collection policies and areas of interest. However, a hybrid approach of demand-driven cooperative collections “seems to be a fruitful approach to explore because it accommodates shrinking acquisition budgets at the same time as leveraging improved discovery/fulfillment technologies and procedures” (Booth & O’Brien, 2011, p. 151). Booth and O’Brien provide multiple examples of how demand-driven cooperative collections can be built, including models where libraries purchase for each other, with ownership and access as equal priorities. One long-term benefit of CCD is to continue to keep both ownership and access costs as low as possible through the most diverse collection possible, “as UB’s materials budget shrinks and we are able to buy less materials, and as the SUNY aggregate collection becomes more homogeneous, we are forced to borrow more and more outside of SUNY at a considerable cost. What benefits all of us, small or large, is to make the SUNY collection more heterogeneous” (Booth & O’Brien, 2011, p.152). To help manage costs while encouraging coordinated collections, CCD tools such as GIST have configurable elements that help to reduce “the amount of duplication already present within particular groups of libraries” while also helping staff efficiently find the most cost effective option (Pitcher et al., 2010, p. 226). With tools such as GIST available to integrate purchase on demand and factor in consortial or group holdings, and resource-sharing initiated purchasing similar to turn around time for borrowing material, there is now ability to proactively build diverse group collections through resource sharing models (Pitcher et al., 2010, p. 230). Programs such as Not-Bought-in-Ohio at OhioLINK also seek to build diverse collections, enabling increased access through free resource sharing (Kinner & Crosetto, 2009, p. 427). Finally, institutions may participate in several different CCD programs at once to build collections with diversity at as many levels (local and statewide) as possible. As CCD programs and coordinated collection building are becoming much more common, continuing to develop effective tools such as GIST are key to making CCD parts of workflows such as resource sharing and acquisitions that will be affected.

**Getting the Right Local Fit: Configuring Collection Areas Through an Easy-to-Use Conspectus**

One area of CCD programs that is key to success is allowing individual campuses the ability to configure the areas that they would like to purchase materials and have some flexibility in refining these areas. An easy-to-use conspectus interface was created that
libraries can access through the IDS administrative tool (http://my.idsproject.org). The interface allows libraries to select call number ranges they would like to build their collection using a simple toggle button, as shown in Figure 1. Setting up and modifying the conspectus is intended to be simple so that libraries can add and remove subject areas in response to recommendations. The conspectus and the notifications are meant to be used in tandem to fine tune information used to strengthen both local and consortial collections, while still allowing for independent decision-making.

**CCD Communication Tool**

Communication and relevant information can make CCD projects more successful. Providing CCD participants with the data to make decisions builds trust by allowing local control and encouraging CCD activities based on up-to-date information. The CCD communication tool is configurable to send e-mails to CCD participants either daily or weekly (either or both option can be selected). Reports of titles matching selected conspectuses are sent with relevant holdings and ILL request information included, as shown in Figure 2.

Figure 1. my.idsproject.org conspectus interface for St. John Fisher.

![Conspectus Interface](image1.png)

Figure 2. Example of weekly CCD report e-mail for St. John Fisher.

![Weekly CCD Report](image2.png)
The report can be exported in a variety of formats for further analysis, as shown in Figure 3.

Although creation of a metric was not initially something developed, feedback from librarians indicated that they wanted a metric that would allow them to quickly scan reports and e-mails to identify the best CCD titles to consider. This metric can be customized if the library participates in multiple CCD initiatives. The metric uses the following data, which can be weighted and configured to reflect shared policies and practices.

- Number of requests for item at borrowing site
- Number of requests for item within consortia (IDS by default)
- Whether item is owned at borrowing site
- Number of holdings within consortia
- Whether item matches conspectus at site
- Whether item matches conspectus within consortia

Future use cases of the recommendation metric would be to help facilitate automated real-time CCD in resource sharing, batch acquisition checking of requested materials for CCD compliance, or analysis of large purchases such as e-book packages with large batches of ISBNs (as alternate ISBNs would be analyzed). As real-time use of the CCD data was another goal of the CCD project, an application programming interface (API) was built to leverage the data and analysis gathered by the libraries participating in the CCD project. The CCD API accepts both OCLC numbers or ISBNs as input and will return information that is currently held in the CCD application. The data returned is in real-time (up to previous day) and reflects current CCD data. A summary of the data returned from this API is:

- Related ISBNs and OCLC numbers.
- Number of requests for item from the borrowing library and all of IDS Project.
- The match of the conspectus for both the conspectus of the requesting library and any other CCD participating sites.
- Recommendation level (configurable metric that factors in number of requests at site and consortia, matches of conspectuses, and number of local and consortial holdings).

Figure 3. CCD borrowing report for St. John Fisher.
As many libraries in the IDS Project and NY State currently participate in some type of CCD but may not be interested in participating in the CCD program, the general consensus was that they should still benefit from the aggregate data collected for the CCD project so that either selectors or collection development staff could see real-time usage of titles across the consortia, in addition to ownership to make the best decision possible. For example, although a CCD agreement may indicate that only three copies among a group of libraries should be purchased, if dozens of resource-sharing requests are being placed for the title, it may be reasonable to make an exception to the CCD rule. A CCD search tool was created that provides ownership, ILL requests, and conspectus matches across the entire IDS Project. This tool is now available for anyone in the IDS Project to use as a CCD tool.

**Conclusion**

Since flexibility, communication, trust, and assessment are keys to CCD success, building a tool that is flexible and allows for local decision-making without loss of efficiency in the process is a key to building a successful CCD tool. The CCD API tool provides libraries and staff with information in an easy-to-understand format and facilitates communication about CCD decisions within the tools and workflows that they use every day. By continuing to build the CCD API and related tools, staff will be able to efficiently make decisions that will allow for quick patron service and increase the diversity of coordinated collections.

**References**


