From where we are to where we need to be

Assessing special collections

Merrilee Proffitt
Senior Program Officer
OCLC Research
@merrileeiam
Everything

Changes

The Network
So what about special collections?

• Large backlogs
• Expensive processes
• Increasing demand

• Libraries are not shifting away from print (yet) and demand for electronic
• …all against a backdrop of diminished resources
What is collections assessment?

• Systematic, purposeful gathering of information about archival collections
  – “Census” of collections
• Can consist of both qualitative and quantitative data
• Designed to help institution act strategically
Why collections assessment?
Why collections assessment?

Too much to do, too many possible directions!

- Cataloging & Processing (backlogs)
- Digitization
- Preservation
- Collection management

However, *what to tackle* highly dependant on *local context*

Priorities shaped by resources and opportunities
Why collections assessment?
Why collections assessment?
What we know about collections assessment

Taking Stock and Making Hay: Archival Collections Assessment

Martha O’Hara Conway
Associate Director, Special Collections Library
University of Michigan

Merrilee Proffitt
Senior Program Officer
OCLC Research

(pro tip! Google “taking stock and making hay”)
The Practice, Power, and Promise of Archival Collections Assessment

In the ongoing transition from institution-centered collections to a user-centered world of networked information, the role of the research library has changed dramatically. "Rather than focusing on acquiring the products of scholarship," a recent ARL issue brief noted, "the library is now an engaged agent supporting and embedded within the process of scholarship." Successful collections management in this new environment has become a juggling act requiring careful consideration of a number of factors including the proliferation of shared print repositories, the shift to patron-driven acquisitions, the role of digital surrogates in discovery and use, and the importance of redirecting effort from bringing the "outside in" (acquiring local inventory) to pushing the "inside out" (surfacing distinctive collections). Accompanying this transformation is a recurring theme in which the role of special collections is increasingly prominent. If research libraries are successful in realigning general print collections, and if indeed their focus is now more oriented to building and exposing collections of rare and unique materials and collections of "local" importance—those that support the teaching, learning, and research mission of the institution—then research libraries must assess their existing special collections with the goal of reducing cataloging and processing backlogs, effectively disclosing existing collections, and strategically acquiring new ones.

What we know about collections assessment

- You can do this!
- There are models, techniques and tools for you to use
- A growing community of institutions and practitioners
- Doesn’t require special skills
What we know about collections assessment

• A range of institutions have used collections assessment for
  – Dealing with the backlog (processing, cataloging)
  – Prioritizing for preservation
  – Collection management
  – Making a case for funding
What we know about collections assessment

• Opportunities spaces?
  – Digitization and risk analysis
  – Assessing “born digital” needs
  – Collaborative uses
What we know about collections assessment

Foundations program: “…grants of up to $40,000 will support planning, assessment, and pilot activities that incorporate expertise from a mix of professional domains.”
Merrilee Proffitt
proffitm@oclc.org

Questions?

[Thanks to Martha O’Hara Conway, Don Waters, and Christian Dupont]