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To: Toronto Public Library Board – May 12, 2003
From: City Librarian
Subject: **Collection Assessment Process**

Purpose:

To provide the Toronto Public Library Board with information on the collection assessment process and proposed future directions.

Funding Implications and Impact Statement:

The estimated annual costs of collection assessment are approximately \$100,000 in staffing costs, including both inventory and assessment. A one-time cost of \$30,000 is required to customize the inventory function of the automated library system. In 2003, \$130,000 of funding has been identified in the previously approved database remediation capital project. The Library needs to identify a long-term funding source to support this activity.

Recommendation:

It is recommended that the Toronto Public Library Board receive the *Collection Assessment Process* report for information.

Background:

As part of meeting the Strategic Plan goal of providing library materials that meet the needs of our diverse customers, the Library identified the need for a comprehensive collection assessment process. Collection assessment provides a framework within which appropriate data is identified, information from collection-centred and client-centred sources is synthesized and annual and long-term collection plans are developed to meet stated goals.

The Library currently uses a number of methods to ensure that collections are up-to-date, inclusive and reflect the demands and interests of the public. An annual collection development plan guides the allocation of the materials budget and details all collection-related initiatives. System-wide collection development projects are funded based on identified needs. For example, science and technology, law and geography collections have been assessed and developed in recent years. The location of language collections and the need for new languages are regularly reviewed through staff and community consultation and demographic analysis. The publishing and media industries are monitored for trends and new formats such as ebooks and DVDs. Award-winner and annual “Best of” lists are checked. Branch staff provide selection

profiles and scan their collections for gaps requiring replacement titles or missing subject areas. In addition, dated material is systematically weeded from collections based on specific guidelines and usage lists from the automated library system.

However, a truly comprehensive assessment process will provide the Library with a thorough knowledge of its collections against which the public's needs can be compared. Appropriate resources can then be applied to specific segments of the collection. Accordingly, the Library created an initiative in the Strategic Plan to develop this process. Extensive research was carried out in order to utilize best practices. This included a scan of the literature, surveys of other libraries and consultations with experts in the field. The surveys of other libraries showed that few have done extensive assessments and even fewer are doing them on an ongoing basis. Collection assessment is a long-term and complex process and Toronto Public Library will be a leader in this area.

Comments:

A multi-year, subject-based approach will be used to assess adult, teen and children's material in all languages and formats. The planned timeframe for the complete assessment is seven years based on the size and diversity of the Library's collections and available resources. The process for each subject area will consist of inventory, assessment and development over three years. A preliminary timetable has been developed (Attachment 1). The rationale for the scheduling of subjects and languages is a combination of use and demand, need for currency and current condition of the collection. Subjects and languages have also been grouped in order to equalize the annual workload. The timetable will be reviewed regularly and revised as needed, for example if new priorities emerge.

Collection statements will be developed for each branch. These will include a standard for collection level and scope based on tier position and size against which the actual collection will be assessed. Additional information on branch collection strengths that reflect community needs will also be provided.

Collection assessment methodologies will be both collection-centred and client-centred. Collection-centred techniques focus on the intrinsic value of the collection, for example its currency or how it compares with standard lists. These are best used for reference and comprehensive collections. Client-centred techniques focus on either the use of the collection or the user's needs. For example, circulation may be compared to collection size for a subject area or users may be surveyed to determine how well collections meet their needs. These are most appropriate for branch circulating collections although surveys are also useful for assessing reference collections.

The data collected from the assessment will be used to develop an annual system collection development plan and inform budget allocation. It will also guide branch collection development aimed at meeting local needs.

As part of the planning for collection assessment, standards against which the Library's performance can be measured have been identified. They were compiled using the performance measures of the upper quartile of large North American libraries and selected U.S. State and

U.K. Public Library standards (Attachments 2 and 3). A preliminary evaluation indicates that the Library's collections are performing well.

Conclusion:

The successful implementation of a collection assessment process will not only ensure excellent service delivery to the public, but also enhance the Library's ability to manage its collection in an informed, cost-effective and efficient manner. Annual benchmarking against standards will measure the success of the process and allow for comparison with other major library systems.

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City Librarian

List of Attachments:

Attachment 1: Collection Assessment Cycle

Attachment 2: Collection Performance Measures

Attachment 3: Collection Performance Measures for Large Libraries