

**SUNY Potsdam
Administrative Unit
Assessment Summary Form**

Administrative Unit: *College Libraries & Archives*

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PURPOSE

This annual assessment summary form provides the opportunity for units to follow-up on their assessment plans, track progress toward goals, and to highlight actions taken to improve processes and/or efficiencies in functioning that lead to outcomes that benefits students, staff, or the college. These could be process changes or improvements in efficiency, skill level of staff, opportunities for the college, or other aspects over which the unit has a certain amount of control.

SECTION 1: ASSESSMENT PLAN FOLLOW-UP

A key component of the continuous improvement assessment process is regularly following up on [your assessment plan](#). Please review your plan and select one-third of your unit goals, along with related desired outcomes and objectives to report on the progress made.

Selected Goal

Goal #3 Optimize our library management system (Alma/Primo) by completing the technical configuration settings. This includes creating workflows and documentation for acquisitions and invoice data, cataloging and records clean-up, terms-of-use analysis for fulfillment (circulation) services, creating reports within the analytical software to evaluate collections, and clarifying both crosswalk and trouble-shooting responsibilities and workflows for the transfer of data between other university systems and our Alma/Primo system.

Desired Outcomes/Objectives

- Enter invoices into the Acquisitions system to give the library and campus a better picture of library costs and expenditures of resources over time.
2. Update Terms of Use (TOU) tables and library notifications for library materials in the fulfillment (circulation) portion of the Alma system. This will benefit students and faculty who access their records and receive overdue notices.
 3. Clean up obsolete records from the system, including both cataloging records and old patron records.
 4. Work with other departments to clarify crosswalk responsibilities between Alma/Primo and other campus systems. The outcome will provide a timely, regular, efficient, and accurate transfer of student data into our Alma/Primo system.

Related Targets/Measures

1. Using Alma Acquisitions module, create workflows to enter invoices and expenditures. Create reports in Alma analytics that can be shared with administration. Target will be to have complete invoices in Alma from 2021 onwards by the end of summer 2023 and to create five on demand reports.
2. Work with our new Access Services Librarian and library staff to review TOUs (terms of use) and complete the configuration of the Alma Fulfillment module. Completing this step will result in better customer service, including SMS notifications to library patrons. The target for this work will be by September 2023.
3. Obsolete record identification and removal requires analysis of metadata within the Alma system. Using this data, we can remove out-of-date patron records and cataloging records of materials that have not been in the collections for many years. While portions of the work will be ongoing for many years, we will clean up approximately 5,000 out of date patron records and 10,000 bibliographic records by the end of 2023.
4. The successful outcome of crosswalk data will be verified with continuing and consistent successful loads of student information into our Alma/Primo system. Workflow for these responsibilities will be created by the end of summer 2023

Describe the progress made toward the selected goal and the related desired outcomes and objectives. Be sure to include steps taken and any information/data collected and results.

For target 1 listed above, we have been working on the workflow for getting the invoices loaded and connected to expenditure reports. This work has been slowed by organizational changes throughout the past year. We have moved the target date out to summer 2024 for completion of the process of loading the invoices from the past 3 years and institution of a process for future tracking of invoices and expenditures in our library management system (LMS) Alma.

Work on target 2 was done. The TOUs were reviewed, and the configuration of the Alma Fulfillment module was adjusted with changes that resulted from the review. Our email notification system for reminders regarding due dates and overdue notifications is now functional. Before we had turned off notifications because they weren't configured properly. We have not accomplished the SMS portion of the goal as the phone number information from Banner is not consistent. Work left to do on this target is to assess the feasibility of getting SMS notifications to function with the present data that is imported from Banner or to have the email notifications be the primary notification path for patrons regarding their library accounts.

We have made the most progress on target 3. We have cleaned up the patron records so that it is easier to find the correct patron accounts. We were able to clean up over 25K bibliographic records in 2023. We worked on assessing the data from the Technical Migration reports and making sure that those records matched the physical holdings records. When we migrated from the Aleph LMS to the ALMA LMS some of the old records from previously withdrawn materials showed as available when they were imported. This cleanup allows for easier searching and retrieval of the items that are available.

For target 4 we have had success during the spring 2023 semester with less issues and the fall 2023 semester with no issues with patron data loading from Banner to Alma. The Access Services librarian that we hired in Fall 2022 was able to pick up this ongoing project and create a workflow for executing the

crosswalk process at the beginning of each semester. Part of the process is the ongoing monitoring and testing that the systems work together, so that the patron accounts are updated correctly each semester.

Based on the assessment data and information shared above, what planned actions were or will be taken as a result?

For target 1 we need to complete the work of loading the data into the Alma system and identify what the most useful reporting will be once the data is accessible. For target 2 we will need to make a schedule for reviewing the TOU's and make sure that updates to the system don't affect the notifications process. We will also need to decide about whether it is feasible to pursue SMS notifications for patrons or have email be the only notification channel as the data from Banner for emails is more consistent and easier to evaluate. Because of the progress that we have made on target 3, we should work to tell the story about the process with data from the project and what its impacts are for the end users. Target 4 requires ongoing monitoring and testing and keeping updated on system changes generated by the vendors of Banner and Alma. Sometimes updates to one or both systems (Banner or Alma) can cause crosswalk issues, so finding a process for keeping apprised of the updates and anticipating possible issues will help with quicker issue resolution.

SECTION 2: ADDITIONAL ASSESSMENT ACTIVITY

We used data to track the impact of our themed book displays (1-2 per month throughout the academic year) on circulation of the collection and whether the work done to put together and collect the stats for the lobby book displays was worth the impact. We collected stats on circulation of the books in the book display (materials checked out by patrons) and observed whether patrons were browsing and interacting with the displays, whether or not they checked the materials out. In the end, we decided the amount of time making the monthly book displays was worth the impact because the circulation rate was higher than that of the regular collection and we could see people interacting with the displays even if they weren't checking the books out. We also kept the book displays as part of the recruitment effort because admissions tours walk through that area of the Learning Commons and the displays add interest and feature the library collection.