Needs Assessment Toolkit

Kathleen Murray
Assessment Analyst
Flow of Assessment Deliverables

1. Needs Assessment Toolkit
   - Survey
   - Focus Groups
   - Interviews
   Data Collection: 11/05

2. Common Collection Planning Framework
   - Guidelines
   - Tools
   Data Collection: 3/06

3. Collection Plans
   - User needs
   - Policies
   - Goals
   - Practices, etc.
   Data Collection: 7/06

4. Survey of Archive Implementation Experience
   - Cost & benefits
   - Needs assessment tools
   - Technical tools
   - Best practices
   Data Collection: 6/07

5. Case Studies
   - Processes
   - Practices
   - Goals
   Data Collection: 6/07

6. Final Report
   Assessment:
   - Goal achievement
   - Tools
   - Costs & benefits
   Identification:
   - Best practices
   Data Collection: 9/07
Web-at-Risk:
Content Identification, Selection, & Acquisition Path

Curators: Assessment Responsibilities

Collection Development Overview

1. Needs Assessment Toolkit
- Survey
- Focus Groups
- Interviews
- Assessment Data Collection
  11/05

Data Analysis and Demographic Analysis

2. Common Collection Planning Framework
- Guidelines
- Tools
- 2. Common Collection Planning Framework
- 3/06

Case Study Methodology and Template

4. Survey of Archive Implementation Experience
- Cost & benefits
- Needs assessment tools
- Technical tools
- Best practices
- Survey Data Collection
- 6/07

5. Case Studies
- Processes
- Practices
- Goals
- 6/07

6. Final Report
- Assessment:
  - Goal achievement
  - Tools
  - Costs & benefits
- Identification:
  - Best practices
- 9/07
Needs Assessment Activities

1. Needs Assessment Toolkit
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   - Interviews

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   - Goal achievement
   - Tools
   - Costs & benefits
   - Identification:
     - Best practices

Data Analysis and Demographic Analysis
Case Study Methodology and Template
Survey Data Collection

Collection Development Overview
Assessment Data Collection
Collection Development Overview

- Traditional Collection Development
- Web Archive Development Process
  1. Selection
  2. Curation
  3. Preservation
### Web Archive Development Process

<table>
<thead>
<tr>
<th>Policy Setting</th>
<th>Factors: Political mandates, organizational mission, financial parameters, and technical capabilities.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Selection</td>
<td>Factors: Focus of the collection, unit of selection, web boundaries, copyright obligations, and authenticity of materials.</td>
</tr>
<tr>
<td>Acquisition</td>
<td>Requirements for crawling tools: Global or selective capture.</td>
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</tbody>
</table>
| Description    | Baseline metadata: Machine-generated  
|                | Enriched metadata: Specific to an organization; both human-generated & machine-generated metadata. |
| Organization   | Considerations: Retain or modify the organizational structure of the materials as they existed on the web. |
| Presentation   | Considerations: Mirror the web at the time of their capture or selectively present (searching & browsing). |
| Maintenance    | Functions: Training, hardware and software maintenance, performance optimization, backups, upgrades, & duplicate detection. |
| Deselection    | Reasons: Duplication, errors, legal or social considerations. |
| Preservation   | Challenges: Persistent naming, format migration and/or emulation, inventory management, volatility, replication, re-validation, & storage. |
## Needs Assessment Activities: Partner Responsibilities

<table>
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<tr>
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<th>UNT</th>
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Web-at-Risk: Content Identification, Selection, & Acquisition Path

Needs Assessment Toolkit

- Responsibilities
- Timeframes
- Participants
- Guidelines
- Consent Forms
- Instruments
  - Survey
  - Questionnaires
# Needs Assessment Activities: Timeframes

<table>
<thead>
<tr>
<th>Activity</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
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<td>1 Survey</td>
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<td>2 Focus Group: National</td>
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<td>3 Focus Group: Local</td>
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<tr>
<td>4 Interviews: End Users</td>
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<tr>
<td>5 Interviews: Content Providers</td>
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</tbody>
</table>
Survey

• Participants: 19 Curatorial Partners
• Purpose
  - End Users’ Needs
  - Curators’ Needs
  - Functional Requirements for Web Crawler Tool
• Online Survey
  - 4 Sections
  - 47 Questions
• Review Off-line First
• Available Online: June 15, 2005
• Completion Date: July 15, 2005
Focus Groups: Librarians

- National
  1. ALA-ACRL-LPSS
  2. GPO-FDLP
- Local
  - 3 Groups
  - 6-10 Participants
- Purpose
  - Librarians Needs
  - End User Needs
- Completion Date: October 31, 2005
End User Interviews

- Face-to-Face Interviews
- Participants
  - Researchers
  - 9–15
- Focus
  - End User Access Needs
- **Completion Date:** September 30, 2005
Content Producer Interviews

• Telephone Interviews
• Participants
  - 6-9 Web Publishers
• Purpose
  - Needs
  - Concerns
• Completion Date: September 30, 2005
## Needs Assessment Activities: 2005 Completion Dates

<table>
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<tr>
<td>1</td>
<td>Survey</td>
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<td>Focus Group: National</td>
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<td>August 31</td>
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<td>4</td>
<td>Interviews: End Users</td>
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<tr>
<td>5</td>
<td>Interviews: Content Providers</td>
<td>September 30</td>
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Contact Information

Assessment Website
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