

COLLECTION DEVELOPMENT
HIGHLIGHTS & PRINCIPLES



COLLECTION DEVELOPMENT IS . . .

- Integral part of library operations & serves as the unifying factor for allocation of resources to meet goals of strategic planning and the library's mission.
- At the heart of librarianship because it informs all of personal & institutional decisions concerning space, time, dollars, and personnel.
- That aspect of professional practice which provides the opportunity to put into practice one's philosophical beliefs about the purposes of a particular library.

THE CD GOAL IS:

- To provide information, literary & leisure resources that meet the needs of the library's client population within the limits of its fiscal & personnel resources so that each segment is developed with an application of resources consistent with its relative importance to the library's mission & the needs of its clients.



ENVIRONMENT FOR CD TODAY

- Variety of formats with constant changes.
- Tremendous media influence on information & entertainment interests of clients.
- Clients want more but often understand less about us.
- Technology puts many new demands on library staff.
- Materials & information become obsolete quickly.
- Quality is harder to obtain.
- Change and communication is faster and faster.



COLLECTION MANAGEMENT ACTIVITIES

- Mission, Planning & Policy
- Selection & Acquisitions
- Cataloging & Processing
- Maintenance & Preservation
- Assessment & Evaluation
- Accountability & Feedback



KNOWING WHAT WE HAVE

We all think we know what we have but our vision is quite selective and based on anecdotes.

Nothing presents a more persuasive case to convince yourself, your staff, your board members, your funding bodies, and your public than real numbers that can be graphed and compared.

With this information you can make changes, get better and show how well you manage your resources.



KNOWING WHAT "IS"

- Written descriptions – especially for:
 - Individual format or genre collections
 - Collections for which there are no use statistics (i.e., newspapers & reference resources)
 - "Special" collections or rare book collections
 - Evolving or dying collections
- Statistical descriptions for all segments of collections
 - Print: nonfiction, fiction/genre, magazines (if circulating)
 - Media: DVD, video, audio recordings (CD or other), etc.
 - Online resources: homepage hits, individual databases, & other electronic resources



DEFINING COLLECTIONS

Think of it as "putting a fence around them" or defining their parameters using words.



Take a moment: Define your magazine, DVD or "South Dakota" collection in no more than 3 sentences or a short list of phases.

NARRATIVE STATEMENTS

For each particular collection to be described, definitions & limits should be clearly stated so as to be understood by all. For example:



Newspapers: Describe the collection in terms of the intent (purpose), the extent (approximate # of titles & from what types of places), the currency and/or back files/holding period, when they are withdrawn & what happens to them then.

For special collections, define geographical boundaries covered or use other means to fence the collection.

PIECES FOR STATS

First define the segments of your collection:

- Fiction/nonfiction
- Individual media formats
- Adult/juvenile/young adult

Then subdivide them into increments:

- Genres
- Classification
- Other?

Then develop a worksheet to gather info.



STATISTICS TO GATHER

Numbers to gather to define segment of collection:

- Number of items in this segment _____
- How old? Average age of these items _____
- Percent this segment is of larger category _____
- Amount spent on new items for this segment last year _____ (if you don't know what might you do?)
- Note special or unusual or key resources that might be in electronic form or other than "on the shelf" that need to be considered as part of this physical collection: _____

You want to look for things that raise your eyebrows, make you ask "what is going on?" or in some other manner present a 

ADDITIONAL STATS & FACTS

Now gather this info to understand demand & relative costs in terms of space & use

- Number of total circulations/uses in the last 12 month period? _____
- Calculate the turnover rate _____
 (# circ ÷ # items = turnover rate)
 500 circ ÷ 1,000 items = .5 (low)
 500 circ ÷ 200 items = 5 (high)
- Extent of collection (space) _____ (could use linear feet or square feet or . . .)
- Space compared to whole collection space _____

WHAT FITS OUR COMMUNITY

- Our strategic planning process should provide us with info about what our community wants in general
- The turnover rates give us real info about what segments of our resources are most popular
- These pieces of information enable us to do better collection development by:
 - Budgeting better for acquisitions in formats & subjects based on what is in demand
 - Recognizing which collections need to be thinned or killed!
 - Recognizing which collections need to grow or be refocused
 - Reorganizing resources to better meet need & interests
 - Helping us to ask the right questions about the red flags!



SHELF SCANNING IS INVALUABLE

In addition to gathering these types of stats, consider going to the collection segment & looking at it!

- Note where it begins & where it ends
- How does it look? (old & ugly? inviting? dirty? empty? new?)
- Put yourself in the shoes of your clients
- Does the arrangement make some sense or does it seem random?
- Do you have to rely on "code" to find it or are there verbal/subject signs as well?
- What else do you notice?
- Make notes



These notes along with the stats will help you set collection goals for acquisitions, space planning, signage, weeding, etc.

THIS ASSESSMENT PROCESS

- Is a tool & can be adapted to our use & our needs at any given time.
- It is effective in all types & sizes of libraries.
- It teaches directors, staff members & the board about what the collection is really like.
- It enables the library to see where change is needed, to set goals & to move towards meeting those goals.
- We can do a "quick 'n' dirty" assessment or an in-depth, detailed assessment.
- We can do a few problem or "mystery" areas or the whole collection.
- It is a tool. Use it when it fits what you need to know!

SAMPLE WORKSHEET

- Use or adapt the sample worksheets in your file. (Word file named: Assessment worksheet 1 and Assessment worksheet 2)
- Make a new and better worksheet using Excel or something else.
- Gather only information that you will use.
- Goals can be general or as specific as you wish.
- Each subject or segment should be assessed every 4 or 5 years at least.
- This process helps you to determine what needs to change rather than maintaining the status quo year after year.

SELECTING FOR ALL

Selection is the process of finding the "right stuff" for your library.

There are only 2 questions for selection:

1. Is it good? (depending on your criteria & purpose)
2. It is good for this library? (use knowledge of your community, your collection & its use & the library's mission & goals)



UNDERSTANDING WAYS OF KNOWING & LEARNING

We have greatly revised our understanding of how individuals know and learn because of:

- Brain research findings
- Educational studies on learning styles
- Our own experiences



There are many ways to define or categorize how we understand things and what we consider our preferred way to learn new things. Individuals and cultures are different as are generations and genders.



What this all means for libraries is that we must provide a wide variety of formats including not only print but visual, audio and tactile resources to assist individuals depending on age, literacies, and personal preferences.

FOR ALL FORMATS

- Focus on the similarities. Do not make each "new" thing an exception to be treated like no other.
- Attend to the differences that matter.
- KISS: Keep it simple, stupid. Libraries always try to make everything complicated!
- Anticipate the next wave! Don't let it come crashing down on your head!
- Laugh – don't cry! It is just a library – not the operating room! Keep things in perspective.

WHAT WE NEED TO KNOW

- The library's mission & criteria
- What we have & what gets used
- What gets requested (ILL and/or purchase requests)
- How much money we have 
- What are priorities & goals are
- What formats are appropriate for the content
- Who produces good things
- How to identify potentially good purchases

SOME TYPES OF SELECTION AIDS

1. Reviewing journals & other library or subject specific publications (print & online)
2. Other librarians & their collections & experience
3. Ads & "junk" mail
4. Bookstores (online & physical) & best seller lists
5. Vendors & publishers/producers & their sales people
6. Items on approval from publisher/vendor
7. Clients' suggestions
8. Recommended or core lists for libraries
9. Award nominees & winners
10. Materials on "standing order" based on subject/level and/or author
11. Your experience

YOUR ASSIGNMENT

Each group will select from the "hat" a slip of paper with 2 numbers. Match the numbers with the selection aids on the previous slide.

Discuss the pros & cons for each of those as selection aids for your library.

Decide under what circumstances your group would recommend this aid.

A member of the group should be prepared to report briefly your recommendation for each aid you discussed.

CRITERIA FOR SELECTION

Specific by format/media or general criteria for all.
General criteria might include:

Relevant to mission - appropriate	High quality
Aesthetic, literary, social value	Cost effective
Authoritative (competent, reliable)	Timely, current
Realistically represents a pluralistic/ global society	
Stimulates creativity or is thought provoking	
Representative of differing viewpoint, offers balance	
Presents accurate information, impressions, images	
Offers special or unique features not otherwise available	

REVIEWS, REVIEWS, REVIEWS

What are some of the characteristics of a useful review regardless of the format of the item being reviewed?

What specifically do you want to know from a review?

Who are the authors of the reviews? Credentials?

How much can you trust reviews?

A GOOD BOOK REVIEWER . . .

Is knowledgeable about:

- Topic
- Its literature at appropriate levels
- The industry (books, or other format -- film, music, etc.)
- How types of libraries vary regarding mission
- Quality of illustrations (when appropriate) or technical quality
- Added value issues: indexes, tables, maps, etc.
- Other?

Skillful in:

- Using critical judgment
- Writing succinctly & clearly
- Telling what is important
- Being objective without bias or an ax to grind
- Other?



STANDARD REVIEWING JOURNALS

Many of these have both paper & electronic versions.
They are not free.

- *Library Journal*
- *School Library Journal*
- Booklist
- New York Times Book Review
- Horn Book
- Publishers' Weekly
- *Voya*

Learn:

What is used in your library? Why? Look at those available.
Find them online and learn about these and others!

FINAL SELECTION INFO

1. It is necessary to wear your CD hat all the time!
2. Be willing to explore possibilities for sources & items.
3. Make mental note of producers of quality.
4. Recognize that "pre-owned" is okay for the collection even if you buy it that way!
5. Be highly critical of gifts. It is okay to look a gift horse in the mouth!!!





GIFTS: NEVER FREE!

- Gifts are not free. They cost lots of time & space. Be realistic about those costs.
- They may also have long term consequences. Generally, do not accept gifts with "strings" or conditions.
- Only take materials in useable condition. Garbage disposal is not cheap. Let them be responsible for their own. Don't use taxpayers' money to toss out someone else's trash!
- There can be legal, tax & liability issues to consider.
- Accept nothing without transfer of ownership to the library.

BE HARD HEARTED!



- Have a clear policy.
- Have a clear & efficient process.
- Do not let them accumulate.
- Receipt & acknowledgement is important.
- Do not put any value on gifts. It's the law!
- Have board approved guidelines for disposal.
- Have policy regarding bookplates. (Don't use for donated used items no matter how good!)
- Selection criteria is the same for gifts as for purchased materials. Weeding criteria also applies to donated items the same as for purchased ones.

THINNING & WEEDING

Benefits:

1. Save space (real estate & bricks & mortar are very costly).
2. Maintain a core collection & improve quality.
3. Ensure vitality & currency.
4. Increase circulation.
5. Improve functionality.
6. Save time in shelving, finding, identifying, etc.
7. Improve library's credibility & make it more appealing.
8. Receive feedback on collection strengths & weaknesses.
9. Have continuous check on need for repair & replacement.
10. Make money selling useable discards.



WEDDING GUIDELINES

- Use patterns
- Physical condition
- Age (obsolete, out of date, misleading)
- Inappropriate language (dated, unclear)
- Duplicates no longer needed based on demand & circulation statistics
- Redundant coverage
- No longer appropriate
- Incomplete set
- Mistakes (often gifts!!!)

These are guidelines
-- not rules!

[see additional handout word file: weeding guidelines]

DESELECTING THOSE OTHER THINGS

- Magazines
- Films (in whatever format)
- Audio recordings (in whatever format)
- Furniture
- Equipment

Be decisive enough to let go when appropriate.

Think of library materials as supplies not investments!

DISPOSING OF WEEDED ITEMS

- Sell it – Friends or library book sale, occasionally or on-going.
- Donate it – nursing homes, prisons, jail, hospital.
- Recycle it – Check for recycler in your area.
- Destroy it – in a way that your ownership stamp is not obvious.
- Look on the Web for disposal of weeded or used books.

Do what works best for your library. Be efficient!

TEN COMMANDMENTS OF CD

1. Know your client community.
2. Know what you have before you buy, weed, or sort gifts.
3. Write policy. Fight it out on paper ahead of time!
4. Decide what you want to have and do – set goals.
5. Use the same criteria in doing selection & weeding for purchased items and gifts.

COMMANDMENTS CONTINUED

6. Design new process models for a new environment – change!
7. This is both art & science. Requires imagination & creative problem-solving as well as scientific methodologies. Use them all to do CD well.
8. Success is having what users want before they ask for it!
9. Remember that quality is not a function of quantity. It is a function of appropriateness.
10. Quality collections/libraries do not happen by accident!

THANKS FOR JOINING ME!

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