GRAPPLING WITH CHANGING REALITIES

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Abstract

Imbued with the sense of mission to serve as cultural and intellectual bastions, research libraries have continued to build collections to meet both immediate and anticipated future scholarly needs across a broad range of disciplines. While this mission may still stand as a guiding precept today, the issues facing collection development librarians have changed immensely since the millennium. Some important questions remain: How do we continue to meet the mission of building research collections in an era marked by considerable budget constraints, technological innovation, new publishing models and changing expectations from users? How do we engage these changing realities?
Over the last several years the University of Kansas (KU) Libraries have developed several methods to enhance traditional collection development practices in an effort to grapple with the continuing challenge of building research collections relevant to modern scholars and students. This presentation will provide an overview of these strategies, which have included improved ways both to develop and manage collections. Such methods have included improved ways to manage resource expenditures (spending deadlines, database steward program, approval plan review), engaging in collection building (e-book acquisitions, purchase on demand) and collection management practices (serial review, WorldCat Collection Analysis, significant analysis of recent monographic and database usage), among other approaches. In addition, we have guided our work with ideas gleaned from the perspective of institutional and library leadership about the future of research library collections and where such collections may be headed. The audience will be asked to share methods that we, as collection development professionals, can adopt to balance collection development practices within the institutional framework.   Attendees can expect to learn how research libraries are adapting collection development strategies to meet the changing needs of users, ongoing budget constraints, and the vision of the future of collections as articulated by our library leadership.

Introduction

Research libraries are addressing the changing environment in collection development in several significant ways. If one views the changes affecting this activity from a very broad historical perspective, it is possible to see that recent strategies used to build research collections are part of a long continuum of change. Indeed, the very words "continuum of change' were recently used by the KU Libraries Assistant Dean for Collections and Scholar Services, to describe the milieu in which libraries generally exist today.

As the authors interviewed the Dean of Libraries and the Assistant Dean for Collections to gain their insights about the future of collection development in academic libraries, several of the following themes emerged. Librarians must thoughtfully consider how to maximize hard won monetary resources to build research collections that are both highly accessible and useful to scholars and students living in a networked world.   Libraries today are significantly challenged to find the best methods to select, promote, deliver and preserve deep and varied collections of scholarly materials in several formats for

the divergent constituencies they serve. The ubiquitous nature of computing, coupled with the sophistication of mobile devices, allows patrons access to parts of library collections in ways not imagined in the past. Patrons, no longer bound to buildings or schedules, are free to use digital materials and online collections that support numerous disciplines when and where they choose to use them.   While the KU Libraries have no plans to stop acquiring print materials, it may be that the print collections that will be built will be more specialized than before.

In addition to building collections in multiple formats, KU Libraries have expanded their activities to better manage collection expenditures and the collections themselves; engage in building relevant research collections in traditional and digital formats; promote new approaches to acquiring and preserving scholarly materials; and engage the wider community in thinking about the challenges associated with the evolving scholarly landscape and the modern challenges linked to it. These activities must be simultaneously engaged, prioritized, and articulated as meaningful strategic directions to the communities they serve.

Managing Resource Expenditures

Some of the strategies that KU Libraries have used to manage resource expenditures include database stewardship, monitoring spending deadlines, and engaging in a review of the approval plan with YBP Library Services. For the database stewardship model at the KU Libraries, subject librarians are assigned responsibility for assessing the electronic resources supported by their disciplinary funds and reporting their findings annually to the Head of Collections.   Database assessment includes evaluating usage statistics, obtaining feedback from users and library staff, and gathering information about possible alternative products.   A database steward's review of a resource may result in a recommendation of cancellation or with a recommendation to replace it with an alternative resource. Database stewards also have responsibilities related to product promotion, offering instructional assistance in its use, and maintaining awareness of any technical or usability issues associated with the database.

As mentioned above, monitoring spending deadlines represents a management approach used at KU Libraries in an effort to spread purchase orders for monographs more evenly throughout the fiscal year. This practice serves to ensure that a percentage of each librarian's firm order subject funds are committed or expended at regular intervals throughout the year.   The central benefit of establishing spending deadlines has been that monographic ordering by subject librarians has been more evenly distributed during the year, thus alleviating the workload on the acquisition staff.

In conjunction with database stewardship and the imposition of spending deadlines, KU Libraries also conducted a major review of its approval plan with YBP Book Services in 2008. Such a review had not been done since the early 1990's, although individual subject librarians had made minor changes to individual profiles over the years. Meetings with the YBP representative were set up initially with a trial group of librarians and subject areas, primarily in the Social Sciences.   Acquisitions staff provided reports detailing information on books received through the approval plan during the previous fiscal year (2007-2008) to share with each affected librarian. These reports were based on data regularly supplied by YBP and contained information such as:

- LC classification
- Aspect (geographic, interdisciplinary descriptors such as "historical")
- Content Level (advanced-academic, general-academic, professional, popular, or basic studies)

- Category (basic essential, basic recommended, continuations, research-essential, research recommended, specialized, or supplementary)
- Format (biography/autobiography, collection (one author) collection/new, conference monograph, correspondence, diary, interviews, or museum publication)
- Reference type (non-reference, directory, encyclopedia, or yearbook)
- Publishers and average costs of books purchased from each publisher

To facilitate the process, meetings were held with several librarians in groups with similar subject areas or types of collections. In reviewing the information with the YBP representative, librarians were able to make changes in the types of materials selected through the approval plan. For example, depending on disciplinary needs, some librarians elected not to automatically receive textbooks or conference proceedings older than two years. Others set parameters to receive more slips, ensuring that books would not come automatically without their selecting them. Yet other librarians wanted to reduce the number of slips they were receiving. The review also helped raise awareness of the costs of books received from certain publishers.

In fact, the initial work with the original pilot group was so successful that the Head of Collections decided to include all subject librarians in the approval plan review and the entire process was completed by the end of the fall 2008 semester. As a result of the changes made as part of this review, the Libraries' collection budget achieved significant savings and reduced spending for the approval plan by 25%, even after post-review adjustments in some plans were made.

In addition to the YBP profile review, the KU Libraries' Collection Development Department undertook several other projects to gather and analyze statistics about how circulating book collections were being utilized. These efforts were collectively undertaken to make additional more insightful decisions about these collections based on relevant data. For example, one significant ongoing task has been to mine the Voyager ILS database for data about the use of print collections. With the addition of title lists supplied by KU Libraries' primary vendor, YBP, it has been possible to evaluate and compare the use of print monograph titles received via approval plan with print monograph titles selected by subject librarians. The results of this study are scheduled to be published in <u>Library Data: Empowering Practice and Persuasion</u> (forthcoming, November, 2009, Libraries Unlimited); however, it is useful to reflect on that study to examine its shortcomings and offer suggestions for improving future efforts.

Data was extracted from the Voyager ILS using Microsoft Access queries, and the results presented to library faculty and staff in both Access reports and Excel spreadsheet formats. Circulation of titles was analyzed by looking at total circulations per title and whether or not a title had ever circulated. Counting circulations is necessarily limiting, in that in can only measure external use, excluding any in-house browsing. There are also implications for counting total number of circulations when a title may be checked out to a faculty member or graduate student for as long as a semester, while undergraduate students may only check out a title for six weeks. Titles used more heavily by undergraduates would have a higher number of total circulations that titles used just as heavily by faculty and graduate students. As the data was reviewed by subject librarians, several questions about the reliability of the data brought to light further issues about shortcomings in the results. Principally, some locations were included which should not have been, including certain non-circulating collections such as all reference collections and the Art and Architecture Library's closed stacks. Some effort was made to exclude non-book monographs such as government documents, but as the MARC fields were not used as criteria in the queries, it is very likely that some material such as music scores and microfilm were inadvertently included, which we assume would skew downward the total circulation counts of librarian-selected

titles. In this case, explicitly defining the concepts of "book" and "monograph" would be beneficial to do in reworking the statistics at KU.

Given the shortcomings in the final results, they are still useful for drawing broad conclusions about the use of the collections, namely that overall use varies from discipline to discipline. The use of librarian-selected titles compared to titles received on approval also varies from discipline, pointing to the need to better understand both the library's collections and the needs and behaviors of our users. Such an approach could include combining user survey results with usage data to generate a fuller picture of what users need and how we can improve our collections to match those needs. Additional directions in collection evaluation methodology could address differences in publisher output and quality through the analysis of the acquisition and usage of titles by publisher. Regardless of approach, all evaluation activities should serve to further the goal of using data as evidence for making decisions about collection development.

Collection Management Practices

It has been the KU Libraries' practice to conduct a major serials review on a triennial basis to identify cancellations based on a percentage of the total cost of the subscriptions. With an average 10% annual increase in the price of serials, the collection budget has not kept pace with the increasing cost of subscriptions. The last major review began in the fall of 2005 when KU subject librarians were asked to identify a 12% reduction in the serials budget in two tiers over two-year period. During these reviews, data was gathered to help inform decisions. For example, usage statistics for electronic journals were examined when available, and circulation, browse, and interlibrary loan statistics for print subscriptions were utilized. Once all of the data was compiled, subject librarians requested faculty input and in the spring of 2006, the final list for the two tiers was posted on the libraries' website, prior to actual cancellation. During the entire process, every attempt was made to distribute the serials cuts in an equitable fashion across the academic disciplines. Subject librarians have found such serials reviews to be a good opportunity to educate faculty about the serials market and the problems libraries face when trying to balance a flat budget.

In the spring of 2008, KU Libraries were facing another budget deficit, and serials again required review to achieve budgetary savings where possible. The strategy employed at that time consisted of identifying serials that were duplicated in print and electronic formats to meet reduction needs.   By identifying serials for cancellation early, KU Libraries determined it could stave off another serial review in the next fiscal year, even while cognizant of the fact that cancelling serials available in aggregated databases can pose risks. The acquisitions staff supplied subject librarians with lists of duplicated serials that had no gaps in print and electronic coverage. Faculty members were consulted when decisions were difficult for librarians to make independently, and while this review only required a few weeks to complete, sufficient numbers of serial titles were identified for cancellation to cover increases in the cost of serials that were retained.

Earlier in this year, subject librarians also reviewed serials and standing orders in the reference collection. In most cases, the goal was to identify electronic resources that could replace print versions. Following that, a comprehensive review of the microform titles was also conducted for the purpose of substituting electronic formats for microform formats. Finally, in the summer of 2009, a small group of librarians reviewed database subscriptions and identified a list of databases for potential cancellation based on low use.

In March 2009, KU Libraries began a subscription to the WorldCat Collection Analysis (WCA) tool. An internal Wiki was developed with links to articles and reviews about the WCA, lists of peer groups, and a timeline for completing comparative reports. In addition, a template was created for subject librarians to use when submitting their findings after analyzing WCA reports. The Head of Collections also formed a WCA Users Group which met once a month to discuss individual concerns and challenges while working with the WCA.

It should be noted some subject librarians have had frustrating experiences when working with the WCA tool, due in no small part to the inherent limitations within the product. Science librarians, for instance, determined it to be unsatisfactory since there was no way to accurately compare serials collections with other academic libraries. Similarly, humanities librarians have found the WCA to be an inadequate tool when attempting to compare their collections to peer libraries since WCA does not discriminate between multiple editions of a single title. Thus, when humanities librarians began checking titles that WCA reported KU Libraries did not own, they found that more than 50% of the titles were actually owned by KU, only in different editions than held by the other libraries. Notwithstanding these shortcomings, the decision was made that all subject librarians will participate in the WCA-based collection analysis for their subject areas by the spring of 2010. Hopefully, these reports will provide constructive feedback to OCLC on some of the short-comings of this evaluative tool.

Engaging in Collection Building

In addition to the above measures, KU Libraries has been consciously moving toward increased acquisition of e-books, along with the initiative "Purchase on Demand" (patron-driven purchasing of monographs) in recent months. KU had previously entered into e-book contracts with NetLibrary in 2001, Springer in 2007, and has continually purchased individual e-book titles for the reference collection. These approaches to collection building illustrate the Libraries inexorable movement along the continuum of change that is affecting collection activities today.

The decision to pursue e-books confronts collection development librarians with several questions that must be carefully considered from the beginning. For example, choices must be made touching on all of these issues: selecting among aggregators and publishers; purchasing or subscribing to collections or selected packages of titles; pricing models; Digital Rights Management and associated issues; and the availability and functionality of e-book products. Further, librarians must thoroughly analyze the benefits and potential disadvantages that may accrue from the decision to purchase e-books, especially if such titles will be substituted for print titles or collections. The implications of decisions should be understood fully prior to committing institutional resources to e-book materials. These kinds of questions and issues served to inform the creation of a KU Libraries E-Book Study Group in 2008.

In order to fully understand the implications of the e-book environment, the Group interviewed other library staff in similar institutions to learn from their experience. Arizona State University and the universities of Texas, Oklahoma, Colorado and Washington library staff were consulted and, while conversations about e-books were wide-ranging, several common themes were discovered. In general, it was thought package deals were the most cost efficient, and e-book demand in the sciences and social sciences higher than the humanities. Other themes that emerged among institutions touched on the ease of accessibility and printing, ability of e-books to be used by simultaneous users, and that very little marketing was actually acquired to promote usage. It was also noted that e-books were potentially applicable to a patron-driven purchasing program, a topic following below.

Based on the recommendations from the Study Group, KU entered into an agreement with Safari on a 'current titles' subscription plan, one that allows access to about 1,600 titles published during the current and past two years.   While some limitations exist as part of the agreement, notably prohibition of any downloading, patrons can still enjoy simultaneous usage of single titles, and can print and email links to a page. KU Libraries also negotiated a license with ebrary, EBL, and Oxford Scholarship Online to allow for the purchase of individual titles through the central book jobber YBP.

It should be noted that e-books are potentially useful as part of a patron-driven purchasing program. In fact, such a program, referred to within the KU Libraries as "Purchase on Demand," is now in the beginning stages of implementation, with a pilot program now underway. This approach to adding monographic items to the collection, while not at all restricted to titles in an e-format, appears to hold genuine promise when used in certain disciplines. KU Libraries selected Business, Chemistry, Education, Engineering, Molecular Biosciences, Pharmacy, and Political Science as disciplines where such an approach may be successful. Circulation data generated within the libraries for these disciplines was examined to reveal a general trend of usage covering the years 2004-2008.

Subject	LC Classification	Total Number of Titles	Number of Titles Circulated	Number of Titles Not Circulated	Percentage Circulated	Percentage Not Circulated
Business	HB-HJ	10563	3543	7020	34%	66%
Chemistry	QD	684	300	384	44%	56%
Education	L-LT	3607	1809	1798	50%	50%
Engineering	T-TP	5626	1937	3689	34%	66%
Molecular Biosciences	QH, QR	1594	735	859	46%	54%
Pharmacy	RS	232	127	105	55%	45%
Political Science	J-JZ	6467	2614	3853	40%	60%

Figure 1. Circulation data based on subjects

While some details for the Purchase on Demand approach have yet to be configured, the general framework of the program is as follows:

- Records for titles from the most expensive publishers will be loaded in to the online catalog for up to one year. While the most expensive individual publishers vary by discipline, the general cost threshold for selecting records to load is defined as those items that cost less than $200.00
- After records are loaded in the catalog, library patrons will have the opportunity to purchase "on demand" by selecting a button in the catalog record indicating they wish to purchase it. An order would then be auto-generated and placed immediately by the Acquisitions Department within the Libraries
- Once selected, items are ordered, processed, and made available to the patron within five working days of the date of original purchase

While still in the very early stages, collection development librarians for the disciplines included in this initial Purchase on Demand program are hopeful that interested patrons will make monograph selections reflective of scholarly need.

While considering the best method for adding e-books to the collection, as well as instituting a pilot Purchase on Demand program this year, KU Libraries have recently institutionalized approaches for systematically identifying and developing digital collections housed within the Libraries. In an effort to guide and centrally administer the processes and workflows associated with this work, the Libraries created a Digital Collections Council, composed of a number of members from across those departments with significant interest in building such collections, including Scholar Services, Technical Services, Collection Development, Preservation, Special Collections, as well as other areas of the libraries.

For some time, the Libraries' Scholar Services Department has worked collaboratively with scholars and others both internally and externally in an effort to build digital collections. However, since mid-2008, the Digital Collections Council has focused on internal library collections, working on both processes designed to aid in the solicitation and identification of internal collections and the actual digitization of selected projects. While still in the early phases of existence, the Digital Collections Council is establishing a framework for future practice.

New Publishing Models

KU ScholarWorks is a digital repository for scholarly work created by the faculty, staff and students at the University of Kansas. It was developed under the auspices of the KU Libraries' administration for the purpose of serving as a preferred repository for the collection and preservation of scholarly work by KU scholars. Based on DSpace, open source software created at the Massachusetts Institute of Technology, KU ScholarWorks provides access to this material (including datasets, working papers, pre-publication scholarship, and published papers), and is capable of handling a wide variety of content types and file formats. General guidelines are offered to assist potential faculty to determine if a work is appropriate for KU ScholarWorks and include the following stipulations:

- The work must be education or research-oriented
- The work must be in digital form
- The work should be complete and ready for distribution
- The author/owner must have the legal right to grant KU the right to preserve and distribute the work via KU ScholarWorks.

A major milestone was achieved in April 2009, when the KU Faculty Senate approved an Open Access Policy, thus making the University of Kansas the first publicly funded university to adopt such a university-wide, faculty-initiated policy. Open access policies such as the one adopted by KU provide an excellent opportunity for the faculty and university to offer the broadest possible access to journal-published scholarship while bringing greater visibility to the authors' work. Collective participation in the open access policy provides transparent methods to showcase and share the breadth and depth of the faculty's collection contribution to the academic record.

While the policy itself was passed last spring, implementation details have yet to be announced. Ada Emmett, Associate Librarian for Scholarly Communications within KU Libraries, is currently leading an implementation task force under the aegis of the Faculty Senate Executive Committee. It is encouraging to note that the KU Libraries' faculty librarians have become early adopters of the policy. While implementation details are still in the offing, faculty will be provided the possibility of 'opting-out' (i.e., not participating) in the policy as negotiations with individual publishers may dictate. It is worth noting that those who do elect to participate will retain the copyright of the particular works they submit.

Looking to the future

In the future, it is clear that academic libraries will continue adapting to the changing collection development environment and to the evolving scholarly needs of their constituencies. The KU Libraries plans to use traditional means as well as more innovative approaches to manage and expand research collections, including such methods as managing resource expenditures to be as cost effective as possible; engaging in collection management and collection building practices that are practicable and responsive to scholarly needs of the university; and considering innovative ways to engage new publishing models that pertain to digital scholarship.

As noted in the introduction, the authors interviewed the KU Libraries' leadership and posed the question concerning how academic libraries would continue to meet the missions of building research collections in an era of budget constraints, technological innovation, new publishing models, and changing expectation of users. Both the Dean of Libraries and the Assistant Dean for Collections and Scholar Services articulated the need to "link new kinds of collections and new kinds of scholarly communication initiatives to the values of libraries." While the Dean indicated that she personally didn't believe that KU would "ever be out of the business of acquiring print materials…" she also stated there is a "clear need to move in the digital environment very forcefully. The balance and the challenge are in meeting the needs of the diverse communities, to be much attuned to the users' needs as well as the infrastructure they need to support their teaching and research." Furthermore, she felt that "the future of libraries and research libraries, in particular, will lie in the special collections, the very rare, unique types of materials that we have…"

Thus, there is clearly recognition of the different disciplinary needs to be met by research libraries, and institutions are maintaining and building collections across multiple formats with these needs in mind. In doing so, libraries are raising questions and promoting conversations about the nature of collections and the future role of the library in the academy. This role will undoubtedly include the establishment of more collaborative relations with units on campus and among geographically distant libraries themselves. As the Dean noted, "There are disciplinary differences. To me, the central challenge is getting more…university libraries together in the country, so that there are large centers of excellence of support rather than one university at a time to help leverage some of these collection development expenditures."

In addition to supporting "centers of excellence," libraries may find that a local collection development role in the future lies in building collaborative relationships with other units on campus to expand infrastructure, build expanded digital collections, and engage faculty and patrons in entirely new ways. The KU Libraries, for example, is creating a Center for Scholars, housed in the Libraries, in partnership with the College of Liberal Arts and Science as a way to unite library expertise with faculty and student research in areas of data creation and digital publishing.

In closing, the realities faced in building research collections are continually changing. "…We press for changes that seem to match where scholarly research and teaching are going and that invokes a conversation," the Assistant Dean stated. "I think that's healthy. [C]ontributing to thoughtful conversation about how teaching, research and scholarship are changing is an important thing we do." Such conversations may prove challenging to collection development librarians, for while "collections are great icons of who we have been…when you make changes…[the] debates that ensue are sometimes painful." Though that may be true, it should be very clear to all that these conversations will have a significant impact on collection building activities well into the future.

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