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# Revising a Collection Development Manual: Challenges and Opportunities

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## Abstract

Collection development manuals remain highly relevant to library strategic goals, though they are often in need of revision. Staffing models and strategic goals for liaison librarians and subject specialists are evolving rapidly with collection development competing with information literacy, scholarly communication, and digital services for time and resources. In this context, it is more and more likely for important knowledge about local and general best practices to be forgotten or neglected. At the same time, many new librarians inherit collections responsibility in a market for scholarly content in unstable formats and price models. This paper outlines the experience of Howard-Tilton Memorial Library at Tulane University as it made a series of changes to its manual in 2013.

## Context of the Case Study

The Collections Manual at Tulane reflects its organizational context. Howard-Tilton Library spends about \$4.6 million annually on digital resources, \$2 million annually on books, and its general collections have still grown to include more than 3.8 million volumes. The library supports undergraduate and graduate programs and curricula offered by Tulane-Newcomb College and the schools of Liberal Arts, Science and Engineering, Architecture, and Social Work. The larger institution, a Carnegie research university with "very high research activity," has an FTE of over 12,000. Within Howard-Tilton, selection of materials is divided between 11 librarians. Three of these librarians, in a discrete Bibliographers' department, collect for multiple subject funds and specialize on collections, while eight librarians drawn from different divisions (User Services and Library IT, Technical Services, Special Collections) balance more modest collecting profiles with other responsibilities.

## Literature Review

In 1994, George Soete outlined the relationship between the library and the new librarian, writing that "bringing in a new bibliographer onto the staff is both a wonderful opportunity and a daunting challenge for the academic research library" (Soete, 1994). To what extent

does that remain true? How are different functional areas of the library communicating, and different generations of practice?

A survey of professional literature in the 1980s and 1990s shows significant attention to collection development standards and practices, including publications by the Association of Research Libraries and the American Library Association explicitly devoted to manuals for bibliographers and comparisons of practices. (Bucknall, 1987; Bobick, 1987). There was arguably a consensus that libraries with widely different missions, constituencies, and resources all needed to be paying attention to coordinating and defining how collecting should be done.

Literature on the topic continued in the early 2000s, though perhaps less sense of certainty in the enterprise (Phillips & Williams, 2004). Eric Forte and his colleagues described a training program for collection managers at the University of California, Santa Barbara in which a task force of new and experienced collection managers developed a checklist of major topics and used this to guide the development of the training plan. The program resulted in the creation of UCSB's Collection Managers' Manual, and its authors praised "the opportunity for collection managers and technical services personnel to ask questions and have informal discussions has opened up a new and continuing

dialogue between both groups” (Forte et al., 2002). The manual, consisting of a series of links to various documents and resources about acquisitions as well as resources, continues to be updated. More general reviews of training in collections spoke of the challenges of maintaining competency in collection development, especially given the pace of change and the lessening of relevant training in LIS programs. They reported various initiatives in ALCTS and reviewed important competencies and standards (Herzog, 2004; Tucker & Torrence, 2004). Trends identified by Tucker have intensified in the decade since publication, and staff cuts have made the time investment for detailed on-the-job orientation even more difficult.

### **Rationale for CD Manuals**

Strategic thought among many library leaders towards issues of research instruction, data curation, and emerging service models has largely displaced examination of collections issues in leading academic library forums, such as the Association of College and Research Libraries, apart from weeding and patron-driven acquisition plans, has become quite rare (Association of College and Research Libraries, 2013). This may contribute to the relative silence about collection development training for liaison librarians. Since a significant majority of libraries maintain selection programs for varied products in varied formats, however, best practices continue to merit discussion.

The consequences of not having a manual, or not using it to improve communications, are evident in the experience of one of this paper’s authors. In a first academic library job, there had been no initial orientation to collection development beyond cursory review of the approval plan. A lack of clear expectations and procedures inhibited communication between selectors in public services department and acquisitions staff in technical services, except when a situation had reached a sort of breaking point. Supervisors in public services, when in a position of assessing performance, had limited data or perspective about the issue.

### **The Experience at Tulane**

In 1999–2000, Howard-Tilton adopted a framework of various selection guidelines and procedures for the principal bibliographers and others with collection development assignments, as well as a detailed set of regularly updated subject-based collection policies. These online documents sufficed for several years, but with the significant changes within Howard-Tilton following Hurricane Katrina it became apparent that there was a need for more of a single, comprehensive document. In 2010, many new librarians were hired, many in positions with primary responsibilities focused on user instruction, research assistance, and user services and given collection development assignments. This development led directly to the collaborative effort that produced our first Bibliographers Manual in 2010. This Manual was the product of various stakeholders, including the Chief Bibliographers, research and instruction librarians, and the Associate Dean, and drew from a liaison program of book chairs and liaison librarian bibliographers for each department that had evolved by the early 1990s. The program was seen within the library as a major success in a long transition in which department faculty finally granted primary selection responsibility for library collections to qualified librarians.

In early 2013, the wording of the Bibliographer’s Manual became relevant to a series of meetings of the Bibliographer’s Discussion Group about the evolving roles for liaisons based on strategic models articulated most notably by Duke and the University of Minnesota (Daniel et al., n.d.; University of Minnesota Libraries, n.d.). These frameworks assert the need for subject liaisons to shift their focus away from collections and towards engagement and services including copyright, digital Initiatives, scholarly communication, data curation, and teaching and learning.

Some members of the group, particularly those concentrating on user education and research assistance, raised questions about the disparity between these emerging models and the more traditional bibliographer structure at Howard-Tilton. Among these concerns was what they

regarded to be archaic wording (“bibliographer” and “book chair” among them), and a concomitant silence towards emerging user needs and peer initiatives in policy documents such as Collection Development Policies and the Bibliographer’s Manual. Other colleagues, including those with more collections-centered roles, were reluctant to uncritically imbibe new service models at a time when staffing was already limited.

Differences aside, Howard-Tilton librarians found ways to modernize the Bibliographer’s Manual. There was broad recognition that some departments (including journal-based disciplines with less connection to the library) no longer actively participated in vetting or suggesting books to their corresponding bibliographer, and that the majority of the group worked both as selectors and delivering liaison services to departments. The new version was rebranded as a Collection Development Manual “to address common practices relevant to librarians with general subject assignments within the general collections focusing broadly on books, serials, and digital resources.” Most particularly, it added a section to define liaison best practices of engagement and of promoting library service programs in information literacy, scholarly communication, and digital services.

## **Conclusion and Recommendations**

At Tulane, revisions to the collection development manual have come as a result of challenging but important conversations about collections-related responsibilities and workflows in the role of liaison librarians. The resulting document, which was a compromise and work in progress, became more visible and relevant.

Even if writing a manual that emphasizes collections practices, librarians need to be aware of the potential symbolic importance of the text and organization of such a document. As described by Hur-Li Lee, collection development is an activity whose parameters are socially influenced from within the library and externally

by local stakeholders. It is “a process with multiple dimensions. Its political dimension, for example, includes aspects such as resource allocation, power, and status that are similar to other political processes” (Lee, 2003, p. 26). From the perspective of librarians advocating changes in service models and workflows, an emphasis on traditional practices and patterns could be interpreted as a form of privilege or as an indifference to their professional development priorities. Such a perception could counteract the very communicative goals informing the manual in the first place.

The writing or revision of a collection development manual might highlight known and unknown disagreements among librarians in a given organization. Points of disagreement might include the usage of e-books or the time to be devoted to noncollections roles within liaison work. The process may provide a forum for people in the group with concerns about opacity or inequity in the distribution of resources or for the rehashing of previous political battles. Those in senior administrative roles may have to budget extra time for anticipating and adjudicating such differences.

The process will vary according to the reporting structure, managerial culture, and collection needs of a particular library. It could be a long written document, such as that at Tulane. It could be a series of links to approved internal web pages or research guides, though that is subject to some degree of link rot and may seem more casual. It could be done in a Springshare libguide or other convenient content management system. Important to the wording of a collection development manual is what it is expected to do. Is it simply a collection of policies that can be referred to in the case of uncertainty or when reviewing collections decisions? Will it be handed to new hires for self-directed reading, or will it be the foundation of a long-term initiation plan? Will it be a relatively static document controlled by a senior librarian, or will it be a dynamic group-sourced document that is revisited on predictable intervals.

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## Appendix: Links to Selected Collections Development Manuals

- Cornell University Library. Olin collection development manual. Retrieved from <http://www.library.cornell.edu/colldev/cdmanualcontents.html>
- Tulane University. Howard-Tilton Memorial Library. Collection development manual. Retrieved from <http://library.tulane.edu/collections/tools>
- University of California at Santa Barbara. UCSB library collection managers' manual. Retrieved from <http://collman.library.ucsb.edu/>