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## Collections Management for Newbies

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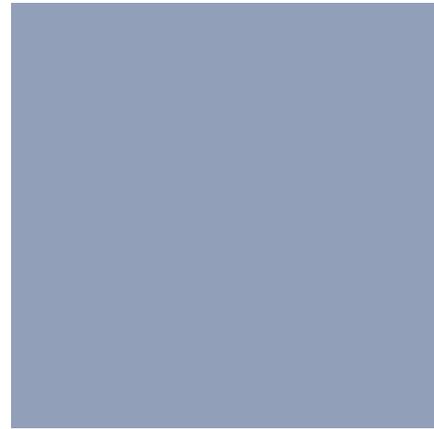
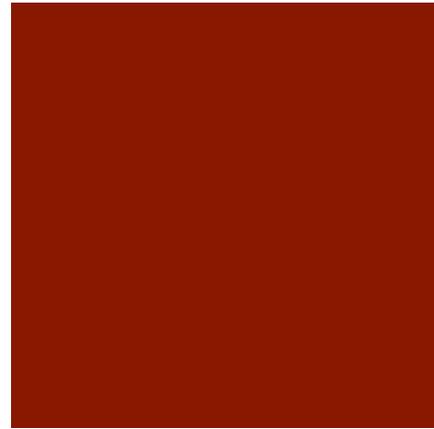
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# Collections Management for Newbies

32<sup>nd</sup> Annual Charleston Conference  
November 9, 2012

Kathleen Spring, Linfield College  
Kathleen Carlisle Fountain, WSU Vancouver



# + Our Backgrounds

## Kathleen

- Circulation/ILL/Media Services turned Collections & IR Manager
- @ Linfield's McMinnville campus
- ~145,000 print volumes
- supervise 1.5 FTE staff, ~3.0 FTE students

## Kathi

- Reference / Liaison Librarian turned Collections Manager
- @ branch campus of WSU
- ~30,000 print volumes
- supervise 1.0 FTE staff, .6 FTE students

# + Session Goals

- To provide opportunities for active discussion amongst audience – we have lots to share, but we know you do, too!
- To share dual perspectives as we examine:
  - budgets
  - workflows
  - long-range planning
- To present specific examples as a way to highlight issues or demonstrate approaches to problem-solving

# + Managing Budgets

## First Steps

- Budget review
- Financial regulations
- Plans for renewals
- Budget requests
- Forecast off-budget needs
- Foster flexibility

## Next Steps

- Contingency budgeting
- Examine/revise allocation models
- Proactive identification of external funding sources

# + Managing Workflows

## First Steps

- Establish calendars
- Document existing workflows
- Identify training gaps

## Next Steps

- Identify efficiencies
- Build in new projects to workflows
- Provide training & professional development opportunities

# + Long-Range Planning

## First Steps

- Identify and involve stakeholders
- Assess existing collaborations
- Examine priorities and policies
- Establish assessment practices

## Next Steps

- Integrate stakeholders into operations
- Revise priorities and policies
- Review and revise assessment practices

# + Example: Book Allocations

## First Steps

- Budget
  - Available funds
  - Chose metrics
- Workflow
  - Data collection
  - Allocation schedule

## Next Steps

- Long-range planning
  - Future of selector purchasing
  - Adoption of DDA plans
  - E vs. P
  - Program needs
  - Humanities vs. Sciences

# + Example: Portland Project

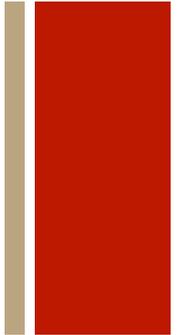
## First Steps

- Budget
  - Major implications for staffing (both full-time & students)
- Workflow
  - Managing projects with little to no lead time
  - Training opportunities for students through sub-tasks
  - Flexibility & nimbleness

## Next Steps

- Long-range planning
  - Need to examine existing collection priorities and CD policy
  - Consider ways to apply the process to other large-scale, long-term collections projects

# + Questions/Breakouts



- What are some of the most surprising facts you've learned about your budget environments?
- In managing workflows at your library, what are the most important lessons you've learned?
- What projects have resulted from long-range collections planning at your library?

# + Summary & Contacts

- Spend early days learning, listening, questioning, and engaging with staff and stakeholders
- Identify changes needed and plan for implementation
- Continually re-evaluate needs and revise accordingly
- *Refer to sources in our Resource Guide to find answers and keep current*

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# Resource Guide for New Collections Managers

## Prepared by Kathleen Spring & Kathleen Carlisle Fountain

This guide is not intended to be exhaustive; instead, we've included the resources we tend to use most often.

### Conferences and Continuing Education

Charleston Conference  
Acquisitions Institute  
ALCTS continuing education webinars  
ALCTS e-forums

### Listservs

ACQNET-L  
COLLDV-L

### Library Literature

*Library Journal*  
*Against the Grain*  
*Charleston Conference Proceedings*  
*College & Research Libraries News*  
*Collection Management*  
*D-Lib* (<http://www.dlib.org/>)

### Blogs

Collection = Connection (<http://www.collectionconnection.alcts.ala.org/>)  
No Shelf Required (<http://www.libraries.wright.edu/noshelfrequired/>)

### Books

*Fundamentals of Collection Development & Management*, Peggy Johnson (Chicago: ALA, 2004)  
*Collection Management Basics*, G. Edward Evans and Margaret Zarnosky Saponaro (6th ed., Santa Barbara, CA: Libraries Unlimited, 2012)

### People

Your staff  
Financial staff at your institution  
Legal representation at your institution  
Copyright expert at your institution  
Collection experts working for or in your consortia  
Vendor representatives from providers such as EBSCO, Yankee Book Peddler, Midwest, Gale