11-9-2012

Collections Management for Newbies

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Collections Management for Newbies

32nd Annual Charleston Conference
November 9, 2012
Kathleen Spring, Linfield College
Kathleen Carlisle Fountain, WSU Vancouver
## Our Backgrounds

<table>
<thead>
<tr>
<th>Kathleen</th>
<th>Kathi</th>
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| - 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 | - 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

<table>
<thead>
<tr>
<th>First Steps</th>
<th>Next Steps</th>
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<tbody>
<tr>
<td><strong>Budget</strong></td>
<td><strong>Long-range planning</strong></td>
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<tr>
<td>- Major implications for staffing (both full-time &amp; students)</td>
<td>- Need to examine existing collection priorities and CD policy</td>
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<td><strong>Workflow</strong></td>
<td>- Consider ways to apply the process to other large-scale, long-term collections projects</td>
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<td>- Managing projects with little to no lead time</td>
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<td>- Training opportunities for students through sub-tasks</td>
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<td>- Flexibility &amp; nimbleness</td>
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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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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*

**Blogs**
- Collection = Connection ([http://www.collectionconnection.alcts.ala.org/](http://www.collectionconnection.alcts.ala.org/))
- No Shelf Required ([http://www.libraries.wright.edu/noshelfrequired/](http://www.libraries.wright.edu/noshelfrequired/))

**Books**

**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