LIBR 580
Collection Management

Unit 1

Laurie Prange (Prange-Martin)

Agenda

- Welcome and Introductions
- Taking attendance
- Introducing my pedagogical approach
- Icebreaker – This or That
- Reviewing the Course Syllabus & University policies
- Introduction to the Remind.com texting app
- Reviewing Course Schedule and Assessments
- Activity – Glossary
- Lecture – Unit 1 – Alignment & Purpose of Collections
- Learning Consolidation – Activity: Reciprocal Interviewing
- Next Steps

Welcome and Introductions

Laurie Prange (Prange-Martin)

- 17th year as a faculty member
- Many years as a librarian
  - 10 years as a full-time academic librarian
- Business Instructor at Capilano University
- MLIS from Western in 2001
- MEd (IT) from MUN in 2013
- BC Provincial Instructor Diploma in 2008
- PhD candidate in Business & Management at Aalborg University, Denmark
- For more information, see https://www.linkedin.com/in/laurieprangemartin/

Taking attendance

Let's make sure everyone is enrolled!

This course focuses on developing and managing collections

Speaking of which, I organize and share my collection of curriculum on my professional website: http://electrified.ca/5422/73467.html

My courses are more active than many students are used to!

Icebreaker – This or That

Activity = This or That

1. Distributed to the class are sticks with opposing words at each end.
    1. E.g. fame vs. money, chocolate vs. vanilla
2. Starting with myself, I'll tie the end of yarn around my write.
3. The first stick is read out and I say which I choose. Everyone who agrees with me raises their hand and the yarn gets tossed to them to be tied around their wrist.
4. The final person to receive the yarn then reads out their stick
5. We continue until everyone has some yarn
6. This demonstrates that we are all connected in some way! ☺

Laurie Prange (Prange-Martin)

Reviewing the Course Syllabus and University Policies

Course Objectives:

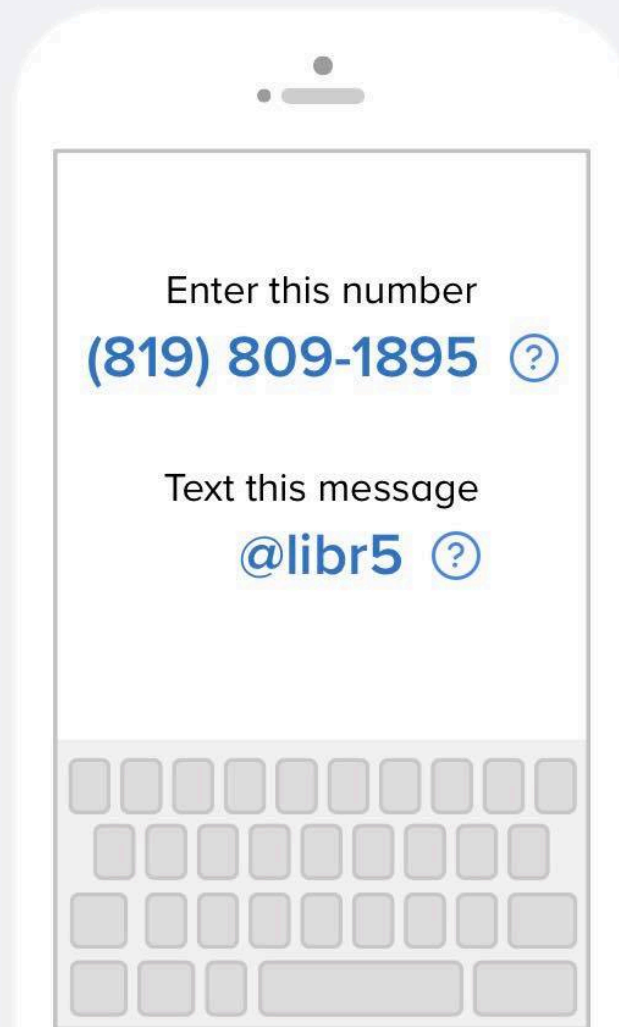| Upon completion of this course students will be able to: |
| --- |

1. Evaluate the purpose and core elements of a collection development policy, and its role as both a guiding and constraining framework for collection management [3.2]
2. Appreciate the broder context in which collection management takes place, and how intellectual freedom challenges, the global economy, the nature of parent organizations, publishing trends, etc. impact collection practices and policies [1.4, 5.1]
3. Analyze options and apply criteria to the acquisition, selection, de-selection, and maintenance of print, special format and electronic collections [1.2, 1.3, 3.2]
4. Recognize challenges and opportunities presented by electronic resources, including licensing, resource sharing, and cooperative collection management [1.3, 3.2]
5. Describe and analyze key issues relevant to collections management including discovery, access, preservation, and use [1.2 3.2]
6. Illustrate marketing principles and strategies for libraries as they pertain to collection development and promotion [1.1, 2.1, 2.2]
7. Assess library collections using a variety of collection- and user-centred techniques [1.1, 1.3, 3.2 4.1, 4.2]
8. Augment an existing library collection based on user needs, the context of use, and identified gaps in the current collection (e.g. topical, format, etc.) and provide a budget and budget justification for these recommendations [1.1, 1.3, 3.2, 4.2]

Course Textbook

- Johnson, P. (2018). *Fundamentals of collection development and management, 4th edition*. Chicago, IL: ALA.

- E-book version of 3rd edition (2014) http://bit.ly/2KuJ84w

Texting via Remind.com app

Tell people to take out their phones.

Enter this number
(819) 809-1895 ⓘ

Text this message
@libr5 ⓘ

Laurie Prange (Prange-Martin)

Course Assessments

Portfolio-based Pedagogy

Course Assignments,

Assignment Name	Due Date	Weight	Graduate Competencies
Participation, both in-class and in the LMS	Throughout term	10%	1.4, 3.1, 3.2, 5.1
In-Class Assignment #1 – Plan for Innovative Thinking Staff Retreat	July 5	10%	1.1, 1.2, 2.1, 3.1
In-Class Assignment #2 – Community Consultation	July 10	10%	1.1, 1.2, 2.1, 3.1
Project #1: Needs Assessment Plan – submitted via LMS	July 12	10%	1.1, 2.1, 2.2
Project #2: Special Formats Report – submitted via LMS	July 19	10%	1.1, 2.1, 2.2
Project #3 DRAFT Proposal for Collection Consultation Report – submitted via LMS	July 26	10%	1.2, 1.3
Project #3 DRAFT Budget and Plan (Outline) for Collection Consultation Report – submitted via LMS	August 2	15%	1.1, 2.1, 2.2, 3.2, 3.2, 4.1
Project #3: FINAL VERSION Collection Consultation Report • In-Class Community Fair presentation to Guest Judges with Tri-Fold Poster Board display and print copy of Report • Digital copy of report submitted via LMS	August 14	25%	1.3, 3.1

Plagiarism

Since using sources differently, use the following phrase a lot: "Adapted from…"

Together **E**veryone **A**chieves **M**ore

Course Schedule

Course Schedule [week-by-week]:

Topic	Date
Unit 1 – Alignment & Purpose of Collections • Introduction to the course • Introduction to teaching approach and portfolio-based pedagogy • History and context • Planning with the end in mind • Collection Development in challenging times • Group assignments for projects	July 3
Unit 2 – Innovative Thinking for Collections • Theories and frameworks • Making meaning from data • Identifying and anticipating gaps • Exercises for Creative and Innovative Thinking • **DUE In-Class Assignment #1 – Plan for Innovative Thinking Staff Retreat**	July 5
Unit 3 – Community Consultation for Collections • Needs Assessment • Iterative Cycle of Innovation and Needs Assessments • **DUE In-Class Assignment #2 – Community Consultation**	July 10
Unit 4 – Formats in Collections • Special formats in Information Organizations • E-resources • **DUE Project #1: Needs Assessment Plan – submitted via LMS**	July 12

Unit 5 – Accountability and Alignment Through Planning Collections • Principles of strategic management • Mission and vision statements • Guiding Principles • Strategic Directions • SWOT Framework • INTRODUCTION to Project #3 – Collections Consultation Report	July 17
Unit 6 – From Planning to Creating Policies for Collections • Policies in Information Organizations • Developing collections • Communicating to colleagues, patrons, champions, and stakeholders • **DUE Project #2: Special Formats Report – submitted via LMS**	July 19
Unit 7 – From Policies to Fiscal Management of Collections • Vendor relations, negotiation, and contracts • Long-term fiscal planning vs. one-and-done • Budgeting for Staffing	July 24
Unit 8 – From Fiscal Management to Implementation • Timelines and project management • Assignment of Responsibilities • Documentation and memory-keeping • Launch parties and ongoing Marketing • **DUE Project #3 DRAFT Proposal for Collection Consultation Report – submitted via LMS**	July 26
Unit 9 – From Implementation to Assessment • Action Planning • Various Strategies for Analyses • Accountability	July 31
Unit 10 – From Assessment to Evaluation • Demonstrating value • Various Strategies for Analyses, continued • Prioritization process • Reporting • **Project #3 DRAFT Budget and Plan (Outline) of Collection Consultation Report – submitted via LMS**	August 2
Unit 11 – From Evaluation to Management • Key Performance Indicators (KPIs) • Discovery, access, preservation, and use • Change management • Weeding and de-selection	August 7
Unit 12 – Collaborative Collection Development & Management • Sharing and access • Interlibrary loans and document delivery • Working in consortia • Evaluating collaborations and consortia	August 9

Conclusion
• **DUE FINAL VERSION Collection Consultation Report**
  o **In-Class Community Fair presentation to Guest Judges with Tri-Fold Poster Board display and print copy of Report**
  o **Digital copy of report submitted via LMS**
	August 14

Activity – Glossary pages 383-402

Activity = Glossary

- After numbering off into groups of 3, move to sit with new groupmates

- Assigned alphabetical section

- From your assigned alphabetical section, choose five (5) key terms that the group thinks is important to teach the class.

- Prepare brief speaking notes on provided note paper:
  - Rewording of the definition
  - Page references within the textbook
  - List of synonyms
  - Possible antonyms

- Class returns together and each groups presents their 5 key terms.

Lecture

Unit 1 = Alignment & Purpose of Collections

Traditional Approach(es)

- University of Connecticut Library Collection Development Plan (PDF) http://bit.ly/2KFYq2i
- Developing a Collection Management Plan from the Government of New Zealand http://bit.ly/2lQFkvy
- A Guide to Developing a Collection Plan from Southern Ontario Library Service (SOLS) http://bit.ly/2lQn85B
- Guide to Managing Historical Societies: Conservation of Collection and Collection Management Plans (PDF) http://bit.ly/2KsSptV

Notice how these plans assume a static situation?

How do change our approach in changing times?

Changing times...

- Usership, especially under 30, rising rapidly
- The original co-working space!
- Majority of Cdn population retired or 10 years away from retirement
- Post-secondary funding lowest since WWII
- 24% of citizens were not born in Canada
- 36% of citizens don't live in the province/territory of birth
- Politicians (including Cdn) running on platforms of eliminating libraries and archives

So, if there are so many examples out there, what do you get from this course to be ready for the future?

Rely on the scholarship of business management and innovation

What do you think is the purpose of a collection?

What is a Purpose, anyway?

- The reason for which something exists

- The sense of determination

- The goals set by a person or a group

Alignment

- Fair to assume = current collections align with needs of current active and past library patrons

- But, does now and in the future align…
  - With what current Board wants?
  - With what current and future library patrons want?
  - With where the organization is going according to strategic and organizational plans?

Management Process – 4 activities

1. Planning
2. Organizing
3. Leading
4. Controlling

- Do this with the organization's financial, physical, human, and information resources to achieve purpose and goals

Importance of goal setting

- Provides direction, guidance, and motivation
- Helps to allocate resources
- Helps to define corporate culture
- Helps managers assess performance

Steps in Formulating Strategy

1. Setting strategic goals

2. Analyzing the organization and its environment

3. Matching the organization and its environment

Types of Plans

- Strategic = resource allocation, priorities, and steps
- Tactical = short-range implementation plans
- Operational = targets for daily/weekly/monthly
- Corporate-level = how various parts relate to each other
- Business-level = how it will compete
- Functional = basic course of action for each department

We are going to apply this research on management to our library practice

Learning Consolidation & Check-in

Activity = Reciprocal Interviewing

- Pair up with a neighbour
- Discuss and agree on one question to ask me about:
  - The course
  - What was covered in class today
  - Something fun about me as a person
- We will re-group and each pair will ask their question
- Note: I reserve the right to postpone or not answer something ☺

Next Steps

Next Steps

- For Unit 1
  - Read Ch. 1 = Introduction to Collection Development and Management
  - Enter due dates in planner ☺
- For Unit 2
  - Read Ch. 2 = Organizational Models, Staffing, and Responsibilities
  - Read Maclusky, G. (2018). *An overview of community innovation trends, Part One: Design-based approaches*. Tamarack Institute. (PDF) http://bit.ly/2Ks9vs1

Thank you!

See you Thursday in the classroom!

Laurie Prange (Prange-Martin)