CONTRA COSTA COUNTY LIBRARY COMMISSION
AGENDA ATTACHMENT 7

MEETING DATE: Thursday, September 24, 2009

AGENDA ITEM #: 12 B

ITEM: COLLECTION DEVELOPMENT COMMITTEE PRESENTATION

RECOMMENDED ACTION:

- None
Recommendations for Selecting Materials

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Based upon discussions performed by Collection Development Committee held in spring of 2009
Transforming Collections: Recommendations 2009/2010 Fiscal Year

Background

The 2009/2010 budget limits both the amount of material to be purchased and the number of staff hours that can be expended to select materials. In response to this change, and as part of its ongoing analysis of materials selection methods, the Collection Development Committee chose to closely examine four competing collection development strategies to consider enacting in 2009/2010. In doing so, the committee recognized that the most important factors to consider are user benefits, organizational challenges, and costs of doing business. The committee discussed how expanding floating collections might cost-effectively add value for customers while presenting unique organizational and staffing challenges.

Considered Methods

- Maintain current practices
- Provide selection by a group of trained planners
- Offer centralized selection by Collection Development staff
- Allow vendor selection

The committee compared and contrasted four integral elements of each strategy:

- Benefits to the customer
- Organizational strengths that would help make the strategy successful
- Organizational challenges the methods might present
- Associated costs

The primary focus was how changes in practices would affect patron experiences of the library. We paid particularly close attention to the efficiency of each practice.

The principal goal is to cost-efficiently transform materials selection process to improve patron experience of library collections countywide. The timely receipt and distribution of materials is a key element of this goal.

Outcomes Desired

The committee’s recommendations combine elements of the four examined selection practices to support outcomes identified in long-term strategic visioning processes and reflected in the Strategic and Collection Development Plans. Desired outcomes are as follows:

- Patrons experience consistently dynamic collections at all 25 libraries
- Collections emphasize reading and life-long learning, rather than inwardly-focused reference materials tied to singular community libraries
- Popular formats expand and less popular formats retract
- Community Library staff spend less time looking inward at collections and more time among community members by performing outreach and programming
- Minimization of time between publication date of materials and availability for patrons.
- Staff expertise in specific subject and genre areas leveraged to broaden and strengthen countywide collections
- Reduction of materials unavailable to patrons due to being in transit between libraries
- Community organizations focus support to accentuate and build unique community collections, including special collections
- Reduction of staff time spent upon fund report interpretation and fund manipulation
- Consistent weeding performed at all community libraries
- Greater use of Staff Suggestion for Purchase form and Collection Profiles to convey community needs

Discussions with Staff

In preparation for developing recommendations, Collection Development staff discussed selection options with Community Library Managers and Adult, Youth and Teen Services Staff at their monthly meetings. Discussions covered outcomes desired, Strategic Plan recommendations, each of the possible selection options and the labor costs of continuing current practices. Staff input was requested. Below is a list of some concerns stated during these discussions.

- Librarians want to ensure that review information will be made available to those staff members who provide readers advisory services
- Librarians want to make sure that selection changes do not help reduce ongoing support from community groups.
- Managers want to make sure that staff-members who are planners have enough time to fulfill responsibilities if those responsibilities change
- Floating materials was clearly recognized as a project that improves patron experiences. Nevertheless, distribution challenges remain, and some staff expressed discomfort with the idea that floating materials might comprise the vast majority of new orders.

Despite these concerns, most staff acknowledged the need to make changes that improve services, and numerous staff mentioned the following:
• Staff members clearly recognize the need to reduce the time between the availability of materials from publishers and when we are able to make such materials available to the public. They recognize that current methods greatly hamper our ability to meet this need.

• Staff understands that current selection methods inefficiently utilize staff resources.

• Staff recognizes that a potential reduction in hours at community libraries heightens the need to expand centralization of materials ordering, as community library staff are needed to provide direct services to patrons.

• Staff recognizes that those collections that have been centrally ordered have greatly broadened the availability of dynamic collections and have improved services throughout the county.

Recommendations

In order to achieve the desired outcomes, the Collection Development staff and committee are making the following recommendations:

1. Budget allocations to community libraries will continue to utilize a formula based evenly upon community population and the last year’s circulation data.

2. Using community library allocations, Subject Planners will select materials that will comprise community library collections. They will do so informed by collection profiles, data analysis tools, staff subject requests, and patron requests for purchase. Materials selected in this manner will not float.

3. As in previous years, materials purchased with the Countywide materials allocations will be centrally selected and will float.

4. Over the past few years, standing orders of annually published titles have comprised about 15% of community library funds. In place of supporting the purchase of such reference materials, staff recommends that this substantial budgetary allocation be used for the purchase of countywide circulating materials. Doing so will support a strategic vision that identifies high-use, circulating reading materials as core collections. Such materials will be centrally selected and will float.

5. Expenditure and selection of Friends and Gift funds shall be retained by Community Library staff, unless otherwise requested by the Community Library Manager. Collection Development staff will provide a range of options that allow libraries to utilize such funds cost-efficiently.
Friends and Gift Funds

Friends groups and Foundations are partners that play a very important role supporting both immediate and long-term collection goals. These key partners recognize that the opportunity to borrow up-to-date materials is a strong demand of library users at each community library, and such groups therefore provide money to their local library to be spent immediately on library materials to be owned by their local library. Additionally, some community groups support the development of community library collections that reinforce a specific community character and therefore nourish an important element of the Strategic Plan, that of Library as a place that reflects the uniqueness of a community and reinforces the Library as a central, vital community resource.

It is important that we develop practices that ensure continued support from such groups. Current practices often do not reflect these expectations in so far as the following phenomena occur:

- Libraries do not utilize the totality of Friends, Foundation and Gift materials funds despite their having been allocated for the purpose of purchasing books. For example, over $400,000 of allocated Friends, Foundation and Gift funds remain unspent at the end of fiscal year 2008/2009. This is not responsible to those donors. Current methods do not succeed in utilizing allocated gift funds for materials patrons can use.

- Such funds cannot be used for audiovisual materials, and these are among the most popular materials in the libraries. This fact puts added pressure on the need to grow the countywide funds that do support such materials.

- Friends and Gift funds are often utilized as a means to support the general community library collection, rather than supporting a core collection area that strengthens the library’s connections with residents in a clear and obvious manner.

New practices should retain local control, support responsible utilization of funds, better integrate practices with demand, and, where possible, support strongly unique collections in each community library with such community group support.

The Library can do so by providing the following options:

- Allow Community Library staff to ask for selection lists from planners on an ongoing basis, recommended to be quarterly but certainly can be more frequent if demand warrants.

- Allow Community Library staff to work closely with Collection Development staff to develop lists that match a unique community need. Materials could then be selected by community library staff, or, where appropriate, could be utilized to develop vendor selected lists (for Foreign Language materials, for example).

- Allow Community Library staff to designate gift funds to be utilized by planners in their selection practices. One simple way to do this would be to allow the allocation of some of these funds to the planners that are responsible for new and upcoming titles.
• Provide Community Library Managers the option of allowing Friends groups to support floating collections, including the audiovisual collections.

Community Library staff, Collection Development staff and the Deputy County Librarians should work closely together over the course of the year to assess the use of Friends and Gift funds and to ensure that their use reflects partner expectations that monies will be spent on community collection needs.

Community Library Funds

Continuing to allocate County funds to specific communities satisfies the important need to be able to ensure that all communities are served equitably and consistently. Using these funds, planners will select materials based upon staff subject needs requests, detailed collection profiles developed by Community Library staff, patron requests for purchase, and lists created by vendors using input from Collection Development staff. Planners will select quantities to be ordered for the county library and will do so using their broad knowledge of community library needs and their specific knowledge of subject matters and communities.

Based upon allocated funds and community profiles created by Community Library staff, Technical Services staff will use CARL Acquisitions function called “Distribution Profiles” that utilizes automated fund coding. Automated thresholds placed upon fund codes will not permit orders to surpass allocations. Using this functionality greatly reduces labor time involved in coding orders.

Planner selection of monthly order lists will reduce the time it takes to order materials by 4-6 weeks, will increase the likelihood that orders will be fulfilled immediately, and will greatly reduce the amount of staff-time invested in the selection process. Technical Staff will be able to immediately order upon receipt of a planner's list, rather then wait for a compilation of multiple monthly lists.

The number of fund codes will remain high. Implementation of CARL X will allow a reexamination of fund codes. Carl X allows staff to flexibly develop reports that will provide more detailed materials spending information than what we can learn from current fund reports. Furthermore, one of the strengths of floating collections is that doing so allows us to reduce the number of fund codes exponentially, and likewise reduces a huge amount of labor time involved in using the Acquisitions module to order materials and track funds. We should continue to examine increasing floating collections with this in mind.

Supplementing Countywide Collections with Community Library Funds

Over the course of 2008/2009, Collection Development Committee members analyzed the utilization of Standing Order funds that are derived from Community Library funds and came to these conclusions:

• Such funds do not accurately reflect actual monies spent on standing orders.
• The number of titles published annually is decreasing rapidly. This disables our ability to budget for such standing orders on an annual basis.

• Whereas community needs can change quickly, standing orders often reflect needs from previous years and/or eras. Using standing orders as a core selection method does not allow for flexibility and should be reduced.

• Selection and distribution of standing order materials is based upon a formula connected to library size. Collection Development Committee members found that such distributions rarely reflect countywide or community need.

• Much of the information in annual and continuations titles does not change annually, and libraries regularly retain older copies for circulation purposes. During a year of budget retraction, it is recommended that the Library not invest in materials that will be replaced almost immediately, unless a compelling community need for such materials exists.

Countywide collections that float comprise the Library’s collection areas with the highest annual circulation rates. This include floating audiovisual collections, bestsellers, materials with long hold lists and collections built to support new cultural trends. The Collection Development Committee no longer recognizes standing order reference materials as part of our core collections, and, instead, has identified circulating collections as core collections that require sustained strong financial backing.

Materials that had been ordered as standing orders shall be available for Planners to order with Community Library funds as demand merits. Planners are aware of materials such as travel books and exam book titles that had been obtained via the standing order plan, and will flexibly and selectively purchase such titles.

Conclusion

The Collection Development Committee has been asked to develop practices that support the stated recommendations and address potential concerns. They have identified the task of helping to make new selection methods succeed their primary focus in 2009/2010.

Committee members have begun by creating a set of collection profile forms to help gather information about community needs for collection planners to use (see attachment). In order to support readers advisory services, committee members have recommended use the Next Reads service to develop booklists based upon the most recent orders. Furthermore, we recognize that working closely with Community Library Managers to develop a work-plan for the utilization of Friends and gift funds will be the highest priority for Collection Development staff during the first two months of fiscal year 2009/2010.

This plan does not remove community library staff from the selection process, but rather ensures that highly skilled staff-members perform work that is not being repeated by others, and do so with as much information as possible to support user needs throughout the County. It is vital that community library staff continue to participate in this process. The committee clearly recognizes that the skills, interests and knowledge of community library staff support the creation of lively,
deep, and transformative collections. The plan leverages community library staff expertise to magnify unique staff skills for the benefit of patrons countywide.