

## Strategic Planning Group for Balanced Collections

Members: Mary Barbosa-Jerez (chair), Karen Engler, Ken Johnson, Janet McGrath, Dawn Moder, Charlie Priore, Christina Sinkler-Miller. Report submitted by May 1, 2014.

### **“We provide balanced physical and digital collections to support our rigorous liberal arts curriculum.”**

The St. Olaf Libraries have done considerable work in the past five years to ensure that adequate coverage is provided across all areas of the curriculum. Achieved by a considerable redistribution of funds, we have increased holdings and research tools for the members of the science and music communities, as well as the social sciences and fine arts. STO libraries have also begun the implementation of a very basic approval plan, acquiring award-winning and core academic monographs, rather than relying on (what were inconsistent) faculty requests for individual titles as a means of building collections. Additionally, we have expanded monograph access exponentially with an aggressive e-book buying program that uses only a fraction of the financial resources consumed by annual print acquisitions.

By strategically assigning tiered values to journal titles, and changing our default format to electronic for all journal titles we were able to add important titles without increasing our journals budget, providing greater coverage across disciplines. We have also considerably expanded the college’s electronic holdings in all arenas, and across all academic fields through the acquisition of streaming audio and video, image, data and primary source archives.

The work accomplished, however, is reflective of collection management at St. Olaf College Libraries, and does not reflect the broad array of materials available to our community as a result of our participation in the Bridge Consortium with Carleton College. One persistent question our strategic planning group asked was: *What does “we provide balanced collections” mean, in light of our consortial partnership?*

In the early years of the consortium, though the term “collaborative collection development” was used frequently, our libraries remained “two collections” that (in theory) “function[ed] as one.” However, our initial shared collections were “accidental” (a cross-institution assessment of the monograph collections revealed minimal title overlap). Our pro-active strategy to reduce monograph duplication could be better described as “collaborative acquisition” (title-by-title decisions to determine whether a single copy might be sufficient for use by both college communities) than “collaborative collection development.” Even in purchasing databases and electronic resources, our practice has been opportunistic, at best: our goal has generally been duplication-at-a-discount, rather than intentional, balanced collection building for a single community.

The members of this strategic planning group believe that as a mature consortium, we should be considering the *strategic creation* of balanced collections as we continue to make purchasing and collection decisions. We’d like to see a visionary statement for Bridge Collection Development that is

reflective of the community we are today and the community we would like to become in the next few years. As a means toward this, we propose the following actions in the next 24 to 48 months:

- To determine a baseline for our present opportunities and challenges, and as a first step in planning future initiatives:
  - Conduct a SWOT or Balanced-Scorecard Analysis (or both) for STO library collections.
  - Invite Carleton's librarians to do the same for their institution.
  - Ultimately begin discussions about a shared SWOT/Balanced Scorecard for the Bridge.
- Approach the Bridge Collection Management Working Group (CMWG) about taking on a year-long project to consider the following questions on behalf of the consortium:
  - Two years ago, we retired the phrase: "two collections that function as one." How do we perceive our Bridge collections and our libraries today?
  - Who are the members of "our community" – how should we be constructing our mental image of our patrons? (as Carleton/STO students, staff and faculty? Or as Bridge students, staff and faculty?)
  - What does the term "collaborative collection development" mean?
    - Does the term imply planning and collection building beyond collaboration in acquisition?
    - What does it mean to approach "our/the collections" in a consortial manner?
    - Is our goal to achieve balance within our discrete college-based library collections, or to achieve balance across the consortium?
  - Begin to articulate a statement we can look to, and that can serve as a grounding point for our collection building work together.
- Create an overarching Bridge vision statement that clearly explains what we are doing and why we are doing it (this would likely include collection building as one of its components, but would encompass other visions as well).

### Resources

2CUL Partnership website: Columbia University Library (CUL) and Cornell University Library. 2CUL.org

McFadden Allen, Barbara. "Consortia and Collections." *Journal of Library Administration*. 2000, 28:4, 85-90.

Mengel, Elizabeth and Vivian Lewis. "Collaborative Assessment: North American academic libraries' experiences using the Balanced Scorecard to measure performance and show value." *Library Management*. 2012, 33:6/7, 357-364.

Willis, Alfred. "Using the Balanced Scorecard at the University of Virginia Library: An interview with Jim Self and Lynda White." *Library Administration & Management*. Spring 2004, 18:2, 64-67.