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## **Collection Development and Management Committee**

Report to Orbis Cascade Alliance Council

December 13, 2005

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### **Title of report:**

**Annual Report of the Collection Development and Management Committee**

*Prepared by: Lynn Chmelir, Chair*

## **Executive Summary**

The Collection Development and Management Committee completed its inaugural year. The seven-member Steering Team had three face-to-face meetings and several teleconferences. The entire committee met for the first time in September and participated in setting the committee agenda for 2006.

During the first year the CDMC

1. Completed the ILL Data Supplier Analysis project assigned by Council;
2. Drafted collection development policies governing a shared journal and reference set archive as envisioned for the RLSC;
3. Began work on a pilot project to establish a distributed print archive for important paper journal runs;
4. Made considerable progress on a census of current and past cooperative collection projects that have been undertaken by Alliance members;
5. Decided not to purchase the OCLC WorldCat Collection Analysis software; and
6. Proposed seven projects to pursue in 2006.

The Collection Development and Management Committee would gratefully like to acknowledge the excellent support received from Orbis Cascade Alliance staff members, especially John Helmer, Nancy Nathanson, and Travis Honea.

## Process and Background information

*(Committee charge and list of members forwarded separately)*

The Collection Development and Management Committee was created by Council at its meeting in late January of 2005 upon the recommendation of the Collection Management Task Force. The Task Force Report is available at <http://www.orbiscascade.org/staffhome/CMTFindex.html> Although the committee is not yet a year old, this will serve as our first annual report. The CDMC Webpage <http://www.orbiscascade.org/staffhome/CDMCindex.html> on the Alliance staff home page contains a very complete record of the year's work.

The seven-member Steering Team met face-to-face in the Portland/Vancouver area three times: March 10, May 27, and November 22. The Steering Team works from agendas circulated in advance of the meeting and communicates minutes and other activities to the membership via a listserv maintained by Alliance staff. The minutes of these meetings are posted on the CDMC Webpage. The Steering Team also held several additional meetings via teleconference. In early fall one of the inaugural members of the Steering Team left her position in Oregon and was recently replaced on the Steering Team by Carol McCulley.

The entire committee held its first annual meeting on September 30 at the University of Portland. The meeting was well attended and provided the first opportunity for all committee members to gather. The minutes are posted on the CDMC Webpage. In brief summary, chair Lynn Chmelir, paraphrasing Tip O'Neill, urged members to adopt the theme, "Think consortially, work locally." John Helmer provided a helpful overview of the Orbis Cascade Alliance. Steering Team members reported on the progress of CDMC projects to date. Julia Gammon of OhioLINK was invited as the keynote speaker. She energized the group by describing the many successes that OhioLINK has experienced in selecting within a consortial environment. Faye Chadwell reported on research that she and Cara List have conducted that analyzes duplication and unique titles within *Summit*. Committee members broke into small groups for brainstorming about future projects that the CDMC might pursue.

The Steering Team has been contacted by the Chair of the Electronic Resources Committee to explore the idea of a joint meeting of the two committees in 2006. Planning is presently underway for a possible joint meeting in May.

## Findings

During 2005, the CDMC focused on the items listed in its charge from Council.

### **ILL Data Supplier Analysis Project**

The "special project" to gather ILL data on journal article requests for one month to determine self sufficiency within the Orbis Cascade Alliance was the first charge we worked on since it had a very short deadline. Before ever meeting face-to-face, the Steering Team held several conference calls to develop a survey instrument to collect the data to answer Council's specific questions. Alliance staff Nancy Nathanson and John Helmer provided invaluable support in developing the instrument. Each committee member was asked to work with his or her director in order to assign the data collection task to the appropriate staff

member(s) in the library. The ST asked John Helmer to alert Council members that the data collection was underway in order to help enlist local support for the task. This is a strategy that will be followed again whenever CDMC members are charged with reporting data for their institutions.

All but one Alliance library was able to return useful data, although there was plenty of consternation about the difficulty of collecting comparable holdings information from *Summit* since the displays are so variable. Nancy Nathanson combined thirty-some spreadsheets into an Access database and provided findings data to the ST. The Steering Team used Nancy's analysis to prepare a report for Council. The CDMC chair was present for the discussion at the April Council meeting in Ashland. The *Article Supplier Analysis Report* and many of the working documents for this project are posted on the committee Webpage (see Report to Council, April 2005).

**Develop collection development policies governing a shared journal and reference set archive as envisioned for the RLSC.**

Steering Team member Mark Watson is taking the lead on this project, chairing the Shared Collections Task Force (SCTF), a subgroup of the CDMC. Joining him are Cindy Cunningham (OHSU), Linda DiBiase (UW), Richard Brumley (OSU, though September), and Lynn Chmelir (WSU). After the committee meeting in September, Mary Jane Cedar Face (SOU), Donna Packer (WWU), and Susan Hinken (UP) joined the TF.

Beginning with a document created by the RLSC Collections Task Force in 2003 (on the committee Webpage), this Task Force drafted the *RLSC Operations Policies* that were approved by the Steering Team at its November meeting. This has been posted on the committee Webpage and Council members are asked to provide feedback to the Steering Team. The CDMC-ST intends for this to be a working document subject to further revision as the RLSC comes closer to fruition.

In the course of this work, the SCTF broadened its charge. Why wait for the RLSC, which may be several years down the road, to begin managing the various Alliance collections in a collaborative fashion? The SCTF brainchild, a pilot project for a Distributed Print Repository, was born!

This project would identify the location of complete paper runs of journals held in Alliance libraries from three electronic packages that are widely held: JSTOR Arts and Sciences I and II and the American Chemical Society (ACS) journals. Two complete runs of each title at various member libraries would be designated as Alliance archival copies. Other runs could be discarded, if desired, with the understanding that the paper archives would be maintained cooperatively in perpetuity. Please see the *Draft Proposal: Pilot Project for a Distributed Print Repository* on the Webpage for a description of this project.

The SCTF is developing and testing a data collection tool for libraries to use to report paper holdings. A Memorandum of Understanding that would govern retention and care of the print archive is also being prepared for discussion. The CDMC will be sharing the details of this pilot project with Council as it makes progress.

**Perform a census of current and past cooperative collection projects that have been undertaken by Alliance members.**

Under Sarah Beasley's leadership, this census is currently underway. In late October, CDMC members each received survey forms to be completed by mid-December. Again,

Council members were alerted to the data collection project so they could support the project. Data are coming in and this project will document considerable cooperative activity that has already occurred among member libraries. Joni Roberts and Carol McCulley will be helping Sarah to display the data on a Website that will be maintained by the Alliance.

**Examine ILL requests for materials that are not in the shared collection and implement a mechanism for purchasing appropriate titles.**

The CDMC has had some preliminary discussions about this charge but has not yet formulated an action plan. This project remains on the agenda for 2006.

**Additional unassigned project**

The CDMC explored Alliance purchase of the OCLC WorldCat Collection Analysis software. Committee brainstorming in September indicated that interest in the Collection Analysis software was not strong, so the Steering Team decided not to pursue this avenue at its November meeting. It was decided that the cost was too high and that *Summit* could be used to achieve many of the same objectives like identifying last copies or multiple copies that might be weeded.

**Propose collection development and management projects for pursuit in 2006.**

This was the topic for small-group discussions at the annual committee meeting in September. Five small groups each listed ideas and assigned priorities for them. Steering Team members served as recorders and the results were compiled in the document posted on the Webpage as "September 30 brainstorming." At its November meeting, the Steering Team discussed these results and selected the following ideas to pursue in 2006.

1. Complete the census of cooperative projects and preserve the data on a Web page.
2. Continue work on the pilot project for a distributed print repository for JSTOR and ACS titles. This helps to lay the groundwork for the RLSC.
3. Explore a cooperative selection environment for monographs via a group contract with a vendor to maximize discount for all Alliance members. Conduct a survey of member libraries to learn about current collecting patterns and budgets. Consider sponsoring a "vendor day" for member libraries. Explore using consortial tools available from vendors at Alliance libraries to select monographs from a consortial perspective. (These ideas were raised by Julie Gammon of OhioLINK at the annual committee meeting in September.)
4. Explore ways to use *Summit* better as a selection tool. Examine ILL requests for books not available within the Alliance with cooperative purchasing in mind. Study *Summit* catalog policies that may support cooperative collection development.
5. Formulate a "last copy" policy for books. This also helps to lay the groundwork for the RLSC.
6. Explore possibilities for central funding for collection development. Possibilities include grants or contributions to a communal "war chest" for joint purchases.
7. Encourage further development of the Alliance subject interest groups with the aim of supporting cooperative collection development.

## **Recommendations**

The Collection Management and Development Committee asks Council to support its pursuit of the projects listed above. If Council members have thoughts about these projects or suggestions for other projects they would like to see accomplished, please share them with their committee representatives and communicate those ideas to the CDMC Steering Team members or chair.