

## Collaborative Collection Development – A review of the literature

Respectfully submitted by Desirae Munro, B.Ed., B.A., MLIS Candidate

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K. Maust, Syracuse University

### Introduction

Libraries are often cited as being the “stewards of community resources” (Demas & Miller, 2012) and interchangeably use various terms for collection development plans to “describe a formal written statement of the principles guiding a library’s selection of materials and the criteria used in selection, weeding, and acceptance of gifts” (Johnson, 2009). As budgets stagnate and shrink, libraries have been turning to collaboration and cooperation projects around shared catalogues more frequently with academic libraries leading the charge as early as the 1970s and more public libraries joining various consortia in more recent years (Machovec, Library consortia: The big picture, 2013). Reviewing the literature on collaborative (sometimes called co-operative or consortial) collection development (CCD) reveals common reasons libraries form or join consortia, common concerns and challenges facing consortia with shared collections, and considerations for libraries preparing new CCD partnerships.

### Why Libraries Form or Join Shared Collection Consortia

As Booth and O’Brien note “libraries are redefining themselves as multi-institutional organizations rather than as stand-alone entities” (2011). While the most common form of CCD found in the literature is centered around non-print materials (Hoffert, 2010) the reasons for collaboration are plentiful as the number of consortia that support them, and each combination as unique as the member libraries of the consortium. Some of these reasons include:

- Group buying power: taking advantage of special subscription prices or bundles of resources from vendors based on volume
- Shared ILS/discovery systems: ability to see the full union catalogue of shared resources. Commonly paired with sharing the cataloging labour burden (member staffing hours or cost for consortia staff) among the member libraries
- Enhanced access to resources: patrons of member libraries have access to the shared resources regardless of their point of access (patron location) or the storage/ownership location (library location); and,
- Contained/predictable costs: when defined by the consortium’s CCD guidelines (Booth & O’Brien, 2011; Evans, 2002; Hoffert, 2010; Levenson & Nichols Hess, 2020; Machovec, 2013, 2020).

Traditionally CCD was viewed as a cost-saving measure, but as Nous and Roslund point out CCD “does not reduce overall expenditures, but allows optimization of financial resources to realign

and redirect” and often results in less duplication of infrequently used resources and greater diversity of resources available to patrons (2009).

### Concerns and Challenges of Collaborative Collection Development

Evans addresses the common desire of libraries to “get something for nothing” In part one of the two-part series *Management Issues of Co-operative Ventures and Consortia in the USA* noting that “during periods of low funding from external sources, libraries have a tendency not to co-operate” (2002). Machovec (2013), Levenson and Nichols Hess (2020) list several key challenges facing many academic and public library consortia as:

- Internal politics and differences of opinion
- Vendors charging a premium or excluding consortia from pricing discounts
- Print versus digital sharing debates; and,
- Direct-to-consumer competitors.

While Hoffert notes that a combination of pride in traditions, individual collection control, and “trouble imagining other systems shopping around for their books” as barriers to CCD (2010). The *consortia conundrum*, which consortium or consortia to join, and a desire to “get the most benefit” is noted not as a barrier but as a common delaying factor in libraries joining CCD projects and can lead to them not getting past the planning stages (Nous & Roslund, 2009). Evans is quoted in Thornton that “perhaps the biggest barrier to cooperative collection building is people” (Thornton, 2004) with Connell specifically noting that CCD among print collections has “moved forward slowly because mind-sets need to evolve before processes can do so” (2008). Trust in the other members of the consortium to do their work was listed most frequently in the literature as the key CCD challenge (Burgett, Haar, & Phillips, 2004).

### Benefits of Collaborative Collection Development

Much of the current literature focuses on academic library consortia and the sharing of electronic resources, the benefits of CCD are noted to be applicable to both academic and public library settings (Nous & Roslund, 2009). In a 2020 survey conducted by Oakland University Libraries, researchers Helen N. Levenson and Amanda Nichols Hess reported the perceived success factors and benefits of consortium membership and CCD including:

- Increased collaboration with peer libraries
- Increased collaboration within the regional area and state-wide
- Enhanced access to resources for library staff and patrons; and,
- Enhanced collaboration on subscription purchasing and cancellation strategies (Collaborative collection development: Current perspectives leading to future initiatives).

Nous and Roslund note that libraries are consistently being asked to do more with less, and that extending CCD to include print materials decreases the cost per circulation when Inter-library Loan (ILL) or shared catalogues are readily available to patrons. Evans points to Ballard’s work in the early 1990s, prior to widespread use of online library catalogues, indicating ILL made up less

than 2% of total circulation and that “people tend to select from what is available [...] rather than seek the desired material” (2002). However, the rise of public library consortia that include printed materials in their shared resources indicates that once library staff can effectively communicate the benefits of the shared collection the library patrons will likely get on board with waiting for the materials they seek (Demas & Miller, 2012). The library shut-downs of the Covid-19 pandemic in 2020-2021 highlighted the need for ILL sharing to be possible with eBook collections as the transportation services for print material ILL were not available (Machovec, 2020). A few regional and one province-wide public library consortium in Canada serve as models for offering both print and eResource shared collections for all patrons to access with “a degree of library cooperation that remains unprecedented” (Saskatchewan Information Library Service Consortium, 2023). Meanwhile the growth of online resources has made successful CCD more common over the last decade (Thornton, 2004).

### Considerations for Libraries Preparing for new Collaborative Collection Development Partnerships

The American Library Association (ALA) established the Cooperative Collection Development Committee (CCDC) in 2007 with the task of “studying, promoting, and supporting [CCD] and related user services” (Mallery & Theus, 2012). While much of the literature notes that not all consortia have formal agreements and arrangements in place, Demas and Miller argue that formal role definitions for member institutions (especially around their CCD responsibilities) strengthen the relationships and value of the consortium for their members; quoting Atkinson that management plans and policies “should show [patrons and staff] the reasons the library contains certain materials and not others are part of a rational, consistent, publicly announced plan. [And that] the consortial partners should also be moved by the policy to view the collection development operation as stable and reliable” (2012).

Evans notes that technology improvements over the last 20 years have made resource sharing easier through union catalogues that are more cost effective and easier to maintain (2002) . However, moving towards CCD is still a complex system for many libraries as collections analysis plays a vital role as prospective member institutions must compare their holdings to identify overlaps (reduce duplication of infrequently used resources) and gaps at the consortial level (Demas & Miller, 2012). Much of the literature notes that proper planning, while time consuming, is justified by its importance to future success for CCD projects.

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