

Notes on Operations

Nimble Collection Development Policies

An Achievable Goal

Helen N. Levenson

This paper identifies and reviews some of the currently relevant components of collection development that contribute to the need for having a written collection development policy (CDP). The requisite elements for a pertinent and usable CDP are identified, being mindful of the need to customize these policies for each library's unique needs. The literature review validates the long-standing purposes of CDPs, quantitative studies of existing CDPs, and some of the inherent drawbacks in the creation and application of these policies. The author presents a case study demonstrating the processes necessary to create a CDP for a medium-sized academic library. This includes more current and relevant considerations for a modern CDP. The paper also includes best practices identified throughout the policy creation process, which have the potential to be applied to other similarly situated libraries.

There has been a fair amount of debate regarding the need for and the analysis of the usefulness of collection development policies (CDP) in academic libraries. There is ample literature that espouses traditional, academic explanations for the need of CDPs. However, the professional literature on this topic also demonstrates a dichotomy on the necessity and effectiveness of these policies in various university library settings. Although having a CDP is intellectually recommended, they are ineffectual if they lack certain characteristics. Additionally, current budget constraints and collection development efforts such as shared print retention programs, collaborative collection development, ownership access versus subscription access to resources, and collection management of electronic and digital resources are continual challenges for academic library collection management. How these elements can be addressed in a CDP creates added challenges. A CDP can appropriately address the issues emanating from such collection complexities. However, these library activities often challenge the traditional constructs used to create CDPs. Conversely, these types of issues can contribute to an even greater need for efficacious CDPs. While these areas of collection selection and management are often more challenging to address in a CDP, they do require attention. Newer, more innovative approaches to creating a CDP should be investigated. There is a plethora of scholarly work espousing the advantages of and need for having CDPs. However, there is a paucity of literature regarding the efficacious processes of actually creating a CDP specifically for the medium-sized academic library setting.¹

The steps to creating a CDP cannot be uniformly applied since each library is unique. Each institution can develop specific, valuable processes to best fit their needs to produce an effective CDP. While helpful information is available

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in the library literature, the actual undertaking of creating an effective CDP will be individualized to have the greatest positive impact for each institutional library. This paper presents a case study of how a mid-sized public academic library collaboratively created a CDP to best fit its current state of collection development activities.

Literature Review

There is little dispute that from an intellectual standpoint that CDPs are valuable, perhaps even indispensable, tools for academic libraries. The library literature has long heralded the need for and usefulness of CDPs.² In her description of the need for CDPs for a specific subject collection, Robinson states that a specific policy furnishes “a framework for acquisitions as well as continued conversations about the scope and focus of” collections.³ This principle applies to written CDPs, whether created for an entire collection or a specific subject collection. Cherepon and Sankowski note that CD policies should define “the principle collection objectives of the library”; identify its “purpose, direction, and philosophy; and is a pointer indicating which direction the collection is being developed.”⁴ The authors also stress that the purpose of a CD policy “is to provide guidance for library faculty in selecting, weeding, and preserving materials, as well as other collection development and management activities, in order to ensure continuity and balance in collection growth.”⁵ CDPs are an important tool “to give librarians the opportunity to map a course for the future while providing for consistent CD strategies.”⁶

The research literature consistently states that the importance of the CDP is to supply librarian selectors with the goals and guidelines “that become the roadmap, the compass, and the force that guides and drives the decisions and activities of” selectors and enables them to “know what the thrust of the collection is or is not going to be.”⁷ The CDP is an articulation that helps ensure that “the library meets the information needs of its service population in a timely and economical manner.”⁸ All these statements remain as valid purposes for having a written CDP. Academic library CDPs should articulate the alignment of the collection goals with the libraries’ and larger educational institutions’ missions. There is an abundance of literature supporting this recommendation.⁹ There is also no shortage of academic publications that offer convincing arguments for the value of having written CDPs, and many of these arguments remain convincing. However, elements of CDPs that have previously been described as essential often no longer fit that description. Due to newer collection formats, methods of acquisitions and delivery, and pricing and publishing models, the current state of what constitutes an effective and well-developed CDP has changed quite a bit.¹⁰

It is interesting to review the recommendations both for and against the need for CDPs.

Earliest Proponents of Collection Development Policies

The classic collection development resources consistently advised having CDPs for all libraries. The American Library Association (ALA) Collection Development Committee issued *Guidelines for Collection Development* in 1979.¹¹ This was a concentrated effort to give librarians the proper tools to craft effective CDPs. A draft of these guidelines was initially published in *Library Resources & Technical Services* in 1977. These early endeavors by ALA were attempts to establish guidelines for the creation of useful and effective CDPs that would “be of use to libraries of all kinds and sizes in formulating statements of their collection development policies.”¹² Subsequently, in 1989, ALA published an updated version of the 1979 publication titled *Guide for Written Collection Development Policy Statements*.¹³ The 1989 publication was initiated under the purview of the ALA Subcommittee on Guidelines for Collection Development, which was created in 1984 with the understanding that an update to the 1979 guidelines was necessary. It is pertinent to note that within a mere five years, a multitude of changes had occurred within the availability of library resources and operations “as well as changes in attitudes toward the value of written collection policy statements.”¹⁴ Even at the time of the 1989 publication, the Subcommittee on Guidelines for Collection Development recognized that the use of what was then considered the new guide would “prompt further revision and refinement,” and therefore the subcommittee requested that the Association for Library Collections & Technical Services (ALCTS) Collection Management and Development Committee appoint a new working group for a third edition.¹⁵ This is an important recognition, having taken place approximately thirty years ago, that such guidelines can be in a constant state of flux and require continual revision due to constantly changing needs. This point is even more pertinent in current times. ALA’s newer edition of the *Guide for Written Collection Policy Statements* was published in 1996, five years after the previous guide. The 1979 and 1989 guidelines were primarily geared to large academic research libraries. The 1996 guidelines expanded its audience to include smaller academic libraries and public, special, and school libraries. The implied understanding is the emphasis on the importance of all libraries, regardless of type or size, on having a formal CDP. After the publication of the *Guide for Written Collection Policy Statements* in 1996, ALA did not publish a subsequent collection development policy document as part of their Guide series. ALA continues to publish updated editions of monographs

concentrating on collection development in general.¹⁶ These resources address fundamental elements and important recommendations for the modern day CDP, and take into account more current collection formats. As these formats, publishing models, and access methods evolve, ALA has also published current, specific guidelines regarding collection development considerations, policies, and management practices for items such as streaming video, open educational resources, electronic resources (e-resources) in general, e-books, and collaborative collection development and shared collections.¹⁷ Reflective of newer methods of delivering information on how to construct a CDP, the Association of Library Collections & Technical Services (ALCTS) currently offers a regularly online course “Fundamentals of Collection Development and Management,” which provides participants with instruction to create a CDP and current trends in collection development, among other components.¹⁸ In addition to the ALCTS course, the Association of Research Libraries (ARL) published current resources to assist in the creation of CDPs that take into consideration the prevalence of e-resources.¹⁹

Role of the Research Libraries Group (RLG) Conspectus

An important aspect of the early CDP guidelines is that they initially advocated use of the Research Libraries Group (RLG) Conspectus or the Western Library Network (WLN) Conspectus to define a library's subject collection levels.²⁰ It was advised that either Conspectus should be used as the framework to evaluate library collections and on which to base collection development priorities. ALA's 1996 guide recognized that a one-size-fits-all model was not effective. It advocated use of either the RLG or WLN Conspectus to define subject classification collection levels or the development of a CDP as a narrative statement, or a combination of the two. Both the 1989 and 1996 ALA guidelines recognized that the “elements of the guide may not be equally applicable to every library.”²¹ ALA's 1996 guidelines state that the guide “identifies the essential elements of a written statement of policy for collection management and development . . . [and] validates the need for creation of a collection policy *to meet local needs*” (emphasis added by this author).²² Furthermore, ALA's 1996 guidelines note that libraries adopting the narrative approach to creating a CDP “can use the principles and concepts inherent in the collection levels *to develop local adaptations*” (emphasis added by this author).²³ These principles remain applicable and are important to bear in mind as a library determines which tools are most appropriate to use to create a CDP. A number of academic points illustrated in ALA's documentation are still valid regarding the descriptions of the value that CDPs offer. However, current elements and activities

of collection development have brought both complications and elucidations to the discussion of the need for and the process of creating useful CDPs. One of these elucidations is alternatives to the RLG Conspectus as a tool in evaluating library collections. One of these complications is data that finds many libraries either have woefully outdated CDPs or lack them altogether.

Absence of Academic Library Collection Development Policies

Interestingly, studies show that although support of CDPs is common within the scholarly literature, a number of academic libraries lack CDPs.²⁴ In 1977, the same year that the first ALA draft guide to CPDs was published, ARL conducted a survey of major academic libraries that showed that only 29 percent of respondents had written CDPs, and of those that did not, only 16.5 percent were in the process of creating one.²⁵ A similar pattern has continued to exist.

In one of the only surveys to address the existence of CDPs in medium-sized academic libraries, Bryant found that 25 percent of survey respondents had neither a CDP nor had conducted activities to prepare one.²⁶ On an encouraging note, Bryant found 42 percent were in various stages of the process of creating a CDP. However, of the libraries lacking any policy, almost 40 percent thought there was no need for one.²⁷ These respondents felt that the library selectors were well versed in selecting relevant and valuable materials, that there was no time to create a written policy, with one responder stating “that the experience [of producing a policy] is seldom worth the effort.”²⁸ Craig also found the work needed to revise an approximately thirty-year-old CDP was not worth the considerable time and effort required of the endeavor.²⁹ In a 2003 review of all 124 ARL member libraries, Straw attempted to determine the number of ARL libraries that posted CDPs on their websites. His review of all ARL library websites revealed that 44 percent of respondents had no CDP statements on their web pages.³⁰ Of the libraries with web links to some kind of collection development information, He found that this “could be anything from a detailed comprehensive policy to a stand alone mission statement.”³¹ Straw noted that a full 27 percent of the library web pages “contained minimal information mostly consisting of very brief facts about the collection or simply departmental location or contact information.”³² He concluded that the lack of web-based CDPs was consistent with earlier studies showing that a large number of ARL libraries lacked written policies. Straw confirms that “some of the reasons that have been put forth [for not having written CDPs] are lack of resources, time, funding, and staffing.”³³ Consistent with these earlier findings, in a more recent survey result published in 2010, Clement and Foy found that almost half of the survey participants

either had no CDP or had CDPs that were more than ten years old, and that only one-third of survey respondents' policies had been updated within the last three years.³⁴ In a survey of fifteen major research peer institutions, Pickett observed that almost half had no CDPs posted on their websites.³⁵ Another survey of ARL university or college member libraries published in 2013 found that the majority of the survey participants had CDPs but reviewed them about once every five years.³⁶

Collection Development Policies Can Easily Become Outdated and Obsolete

Spohrer noted that the CDP at his institution, the University of California, Berkeley, was produced in 1980, and that "no systematic revision" of the policy "was ever carried out and it was never reissued in updated form."³⁷ There was over a twenty-year period in which the policy lay stagnant. He cited common reasons for this, such as the enormous labor needed to update the policy, deteriorating collection budgets that affected collaborative collection building, the increase in formats deemed worthy to collect (he cited datasets as an example), the explosion in electronic and digital resources, and inflationary increases in more standard resources such as serial titles. All these factors quickly made the original CDP outdated. Spohrer noted that the comprehensiveness of the original 1980 CDP could no longer be maintained. He summarized that the "great sweep of subject categories in the 1980 CDPS [collection development policy statement] was seen as an unaffordable luxury for a CD budget under siege, and with the passage of time, the 'level of existing collections' and 'collecting policy level' for each one began progressively to lend the whole document a strangely fictional quality in the light" of more current collecting practices.³⁸ Additionally, Spohrer noted that in the twenty years after Berkeley produced its initial CDP, there were a "number of factors on the national and local scenes which exploded the idealized paradigm underlying the *Conspectus*" making it a herculean task for large research institutions to revisit and replicate such an effort.³⁹ In a more current survey of twenty academic libraries in North America, Horava and Levine-Clark note that of the sixteen libraries that responded to the survey, "5 did not have CDPs at all, and 3 others have transitioned in the past 5 years from an overly detailed policy to one that outlines general principles about collections."⁴⁰ The authors elaborate further:

One library moved from a lengthy and cumbersome policy to one that states simply that the library supports the university's mission with its collections and does not censor. A few respondents indicated that the policies they used to have in

place actually hindered them by being too specific. This move away from subject-level policies or away from policies entirely allows these libraries to be more nimble in responding to changes in focus for the university (such as towards interdisciplinary programs), to new types of resources (such as e-books) or to new collection models (such as DDA).⁴¹

Horava and Levine-Clark's survey findings reflect a situation common to mid-sized academic libraries. Traditional parameters of a CDP can be limiting and rigid when applied to more current collecting influences and practices. In 1995, Hazen was one of the first to recognize the rigidity of CDPs as traditionally conceived. He described them as "static, reactive, and of little practical utility."⁴² Often, some of the traditional principles behind collecting are still applicable, but CDPs must be articulated differently to consider the continually changing information resource landscape. Clement and Foy stated that collection development "in academic libraries is undergoing rapid change, and the guiding policies for collection development need to be dynamic, up-to-date documents that reflect these changes."⁴³ Some examples of these changes and newer developments, in addition to the prevalence of e-resources in general, include open access, born digital, and streaming audio and video resources, demand driven acquisitions, pay-per-view and print-on-demand options, large-scale digitization projects such as HathiTrust and Google Books, Digital Rights Management issues, shared print initiatives, and collaborative collection development.⁴⁴ The shift to numerous e-resources can generally be considered the major change that has taken place in academic library collections over the past several years. There is no sign of this shift abating. The literature is replete in demonstrating that large majorities of academic library budgets are now primarily devoted to e-format resources.⁴⁵

To Have (or Not) a Collection Development Policy: The Reconciliation of Two Minds

The collective findings cited above are not particularly surprising given that common reasons cited for lacking written CDPs were the lack of personnel and time required to compile one and the drawbacks library staff have found in traditional CDPs. In general, there exists an overall consensus that the creation of carefully constructed and useful CDPs is an ambitious, time consuming, and difficult task. These characteristics can easily inhibit the effort to create and implement an effective CDP.⁴⁶ Vickery starkly states that "in practice most libraries either do not have

an up-to-date policy document, or do not make effective use of it when they do have one.⁴⁷ The reasons stated for why an academic library would not have a CDP are well-reflected in the literature, espousing the idea that CDPs are either unnecessary, not worth the effort and extensive work they require, or quickly become outdated, antiquated, ineffectual documents.⁴⁸ Snow opines that written CDPs in academic libraries are unnecessary, are often inflexible, unresponsive to changes that occur within the university curriculum, and at worst “resemble pointless exercises, a costly endeavor to build a world of fantasy.”⁴⁹ Despite this pointed yet insightful criticism, the traditional philosophy and advocacy of the importance of having a written CDP has continued to be maintained. In the most current edition of her classic *Fundamentals of Collection Development and Management*, Johnson states that libraries “without collection development policies are like businesses without business plans.”⁵⁰ This comparison is apt. The CDP provides the basic framework under which the library collection is defined and posits unbiased objectives for collection expenditures. Disher perceptively notes that “having a collection development policy is not the same as having a *useful* collection development policy.”⁵¹ Due to the “changing nature of resources on our collections, budgets, and services,” Mangrum and Pozzebon emphasize that this state of affairs necessitates having a continually maintained CDP.⁵² If a library has a policy that was written decades ago, or even more than five to ten years ago, it will be outdated and will not address newer material formats, current collection philosophies and priorities, and collection limitations. The alternative viewpoints on the necessity of libraries having CDPs led this author to evaluate how a medium-sized academic library can approach the process of creating a useful CDP within the confines of the resources that are available for this process. In the current library environment, flexibility and individualization are not just acceptable but required elements for the creation of a library CDP. Once one applies this principle, the dread, hesitancy, and drudgery in the creation process of a CDP to best fit your library’s and institution’s needs can be greatly ameliorated.

Best Practices Considered Before Creating the Collection Development Policy

As an academic library embarks on the challenge of creating a useful CDP, it is most valuable to assess why the resource selectors feel the need to have a written CDP. This can be a vibrant driving force in the production of a document that will be as relevant and helpful as possible. It is also necessary to review the existing priorities applied to the levels of collecting, support provided to the curriculum, and

mechanisms previously and currently used in developing the collection. This allows for pertinent adjustments to be made and memorialized in the new written policy. If any previous collection decisions are no longer relevant to the institution’s current instructional goals, the period in which a new CDP is created offers the chance to correct course. All these activities will assist in articulating current collection parameters and guidelines. Both experienced and novice selectors will benefit from a written CDP that was created as a result of careful review of these elements.

Evaluating the Current Status of Collecting and Need for a Policy

The absence of a CDP does not necessarily mean that the library collection is not carefully curated. Feng posits that many libraries “while not in possession of a written collection development policy statement, nevertheless do operate with certain goals, objectives, and guidelines when selecting the materials to be acquired” and collect materials “with broad outlines and general objectives” in place, and as a result, “good library collections have been developed.”⁵³ This is important to bear in mind as libraries put forth the effort to produce customized CDPs to best suit their needs. Evans and Saporano note that “hundreds of libraries and information centers do not have a written policy and yet have sound collections.”⁵⁴ The authors state that this is usually the result of librarians being aware of the collecting priorities and the patron base that the library serves but without a written CDP. As new librarians are hired, it is important to have a written policy as a basic training tool and to help them develop collecting expertise so they can implement similarly expert selection decisions.

A blunt truth in the advantages of having a written CDP, particularly for a mid-size academic library, is that the policy offers support in rejecting patron requests to add resources to the collection. Bryant’s survey in the late 1970s found that “many medium-sized academic libraries’ policies were designed almost exclusively to inform patrons of answers (usually negative) to recurrent questions posed by their requests for library additions.”⁵⁵ Feng reflects a similar position when stating that many libraries “can recall with relief the occasions on which we could graciously refuse a gift or request for material of limited value on the grounds that the subject matter, or the format, or the language fell outside of the library’s established collection development policy.”⁵⁶

These issues are still true. They played a major role in why the library faculty at Oakland University, the author’s institution, wanted a written CDP. The library faculty had the extensive and requisite knowledge of the collection’s collecting levels and priorities, yet needed a formalized document to substantiate what they knew and had been

practicing for years. All selectors were aware that a written CDP could effectively and graciously reinforce any communication when turning down a request. Communication to students and faculty of collecting levels and criteria could be much more enhanced and facilitated with a written CDP. An exploration of both traditional and more modern methods of creating an effective CDP follow.

Alternative Elements to Use in Collection Evaluation

The 1996 ALA guide defined collection development as the “process of planning, building, and maintaining a library’s information resources in a cost-effective and user-relevant manner.”⁵⁷ This remains true. However, a more current and modernized definition of collection development, stated by Uziel, is provided below:

Collection development in academic libraries . . . involves the identification, selection, acquisition, and evaluation of library resources (e.g., print materials, audiovisual materials, and e-resources) for a community of users. Collection development is the means by which the library provides high-quality information resources of print and nonprint materials and provides access to e-resources that will meet institutional needs.⁵⁸

Uziel notes that academic libraries are “classified via many institutional characteristics.”⁵⁹ These characteristics include full-time equivalent (FTE) enrollment, public versus private ownership, level of study and degrees offered, and the institution’s Carnegie classifications. Carnegie classifications address both the level of degrees an institution offers and the level of research conducted at the university. The level of degrees offered are generally classified as either less than four-year academic programs, the equivalent of four-year academic programs resulting in a bachelor’s degree, and additional years of study resulting in either a master’s or doctorate degree. Carnegie research classifications are benchmarks of research level activities associated with a university. Carnegie research classifications recently included three levels of doctorate degree research, identified from lowest to highest (R3 moderate research activity, R2 higher research activity, and R1 highest research activity). At the end of 2018, the three doctoral university classifications were changed to R1, doctoral universities with very high research activity; R2, doctoral universities with high research activity; and D/PU, for doctoral/professional universities. The D/PU category was created to classify professional degree granting universities with lower research activity requirements for those students enrolled in professional degree granting programs. This category had not

previously been included in the Carnegie classifications.⁶⁰

These characteristics of educational institutions are very relevant in providing guidance in the creation of a CDP. This is particularly true due to the current status of the RLG and WLN Conspectus. Although once held as the gold standard by which to assess library collections and the criteria by which to base a CDP’s framework, this is no longer the case. Hazen bluntly states that “formulating a collection development policy requires librarians first to categorize the world” when developing the conspectus driven CDP.⁶¹ He elaborates that the conspectus approach dictates that librarians ambitiously categorize their entire library holdings by many different values such as subject classification, format, language, user levels, etc., and thus has “collapsed of their own weight.”⁶² Both White and Craig state that using the conspectus as a collection evaluation tool was a laborious process and the finished evaluation of levels of collecting were ultimately subjectively applied.⁶³ In addition to Hazen, White described the RLG Conspectus as a project that was starting “to collapse under its own weight.”⁶⁴ Henige further elaborates by noting that the conspectus approach to creating CDPs is “too laborious to ever repay the effort” and “provides no more than a largely undifferentiated, highly subjective, and abstract aggregations of selectors’ opinions concerning the strengths of their libraries’ holdings.”⁶⁵ Henige concludes that the conspectus method is based on the false assumption that “all forms of knowledge can be identified, measured, and tested, and more importantly, that these procedures can be encoded and extrapolated from one part of the universe to all others.”⁶⁶ Bullis and Smith also point to the “problematic subjectivity” that was recognized as part of the conspectus approach.⁶⁷ Vickery adds to the overall negative conspectus evaluation by stating that conspectus based CDPs “are inherently inflexible and resistant to change” and difficult to update.⁶⁸ He astutely concludes that conspectus based CDPs “cannot easily be adjusted to incorporate new research areas or interdisciplinary subjects, and a fluid, complex reality cannot be encapsulated in a formulaic policy document. Many senior librarians concede that conspectus, although internationally lauded at its inception, has failed to meet a real working need.”⁶⁹

In a survey of libraries that have applied the conspectus to collection evaluation, Munroe and Ver Steeg cited one survey respondent “who has been using conspectus methods to evaluate the same institution’s collection for ten years and has not yet finished.”⁷⁰ This is a testament to the complexity and laboriousness of using the conspectus approach to building a CDP and its inapplicability to the real, working world. This is particularly true for libraries with limited resources to undertake such a labor intensive and costly endeavor. Taken collectively, these constitute serious challenges to the applicability of the conspectus method.

A more current and very germane concern regarding the conspectus approach to CDPs is that the emphasis on quantitative data that the conspectus methods use to evaluate a collection does not consider shared print retention plans, which are being used more and more frequently in current collection development and management applications. Maddox Abbott states that “there has been an explosion in the past several years of shared print initiatives among academic libraries in the U.S. and around the world.”⁷¹ The emergence of these shared collections, either print or digital, has the potential to place libraries “on the cusp of one of the most far-reaching, national-scale collection management initiatives in modern history.”⁷² The importance and increasing prevalence of this current collection activity deserves attention in contemporary CDPs.

The conspectus is no longer widely used as a collection assessment tool.⁷³ It is also not updated as a collection descriptor and tool.⁷⁴ Although some libraries still apply the principles of the RLG or WLG Conspectus to library CDPs, it is not a required element to use to create a CDP. “Detailed descriptions of collection strengths are very time-consuming and difficult to compile” and take “a huge amount of effort over a prolonged period” of time.⁷⁵ However, one need not let this fact extinguish efforts to develop a useful CDP that reflects a component of collection assessment. This was one of the guiding principles that Oakland University adopted when creating its CDP.

Elements that Have Stood the Test of Time Versus New Developments

There are common elements that are consistently recommended over time and are still useful to address in a written CDP. These include the policy’s statement of purpose, the library mission statement, collection levels, selection criteria, weeding considerations, gift policy, collaborative collection development, consortial activities and commitments, and intellectual freedom. What is most important, however, is to apply the framework to best suit each individual library’s collection policy needs. “Each institution, including its community and other constituents, is unique; therefore, their policy statements will also be unique.”⁷⁶ Futas emphasized this by simply stating, “What really matters most is using a structure that works best for your library’s collection development document.”⁷⁷ This is a very valuable guiding principle to adopt.

One of the most important elements of an effective CDP is to clearly state the policy’s purpose. This enables those who use it to have realistic expectations in its application. It is advisable to connect the CDP’s purpose to the library’s overall mission and to have the stated purpose of the policy act as a brief introduction to what the CDP will include.

Although many libraries no longer use a conspectus based CDP, it is important to communicate the depth and scope of the library collections. Unless one is working in an extremely large research institution, these levels will vary considerably by each subject area, based on the university’s curriculum, degree programs, and in conjunction with the library’s overall mission. Articulating this clearly will be beneficial to both collectors and library users.

The challenges posed by tightening library budgets never cease. Therefore, the library’s participation in consortial purchasing, resource sharing, collaborative acquisitions, and collective collections is apropos to include in its CDP. These programs and activities have a positive impact on collection budgets and can alleviate negative effects of stagnant or shrinking budgets. The CDP should also include shared print serial or monograph programs in which a library participates. These programs are related to responsible downsizing of collections while still maintaining access to important resources. The areas of shared print retention programs and the development of collaborative collective collections will become increasingly important as budget tightening continues and resource output steadily increases. These are components of the current library environment that will require attention in the written CDP, and are factors contributing to the increased need for and use of CDPs as relevant guiding documents.

Libraries’ support of intellectual freedom and the development of collections that represent a diversity of perspectives have been traditional core library values. ALA and its divisions have staunchly supported these ideals. They offer support materials to assist in the understanding and incorporation of these principles and activities into library operations. It is fitting to honor these traditions within the library’s written CDP. A written CDP addresses the minimization in the occurrence of personal bias in the selection of materials.⁷⁸ This is accomplished by setting individual selection decisions within the context of the broader aims and the collection parameters outlined in a CDP. A well-developed CDP “enables individual selection decisions to be justified on an objective basis,” which will lead to “consistency and balance in the growth of the collection.”⁷⁹ Although in the context of advocating balanced collections that represent a diversity of ideas and perspectives, the ALA Intellectual Freedom Principles for Academic Libraries statement also addresses the issue of avoidance of personal bias in the selection of materials by stating that the “development of library collections in support of an institution’s instruction and research programs should transcend the personal values of the selector.”⁸⁰ The idea that a CDP can act as a guard against personal bias in the resource selection process is generally understated in the scholarly library literature. With tightening budgets and runaway inflationary costs, guidelines that reduce selection tinged

with personal bias are a valuable contributing feature of a formally written CDP.

A major component of modern day collection development includes the access and management of a varied collection of electronic or digital resources. Because of these rapidly changing and frequently complex e-formats that libraries are increasingly collecting, a library's CDP needs to be flexible enough to accommodate this growing variety of formats and the changing means of access to them.⁸¹ This requires addressing specifics within the CDP that older policies lacked since these specifics are often based on newer standards and requirements. The library CDP should address the accessibility of resources in all formats.⁸² Currently, electronic and web-based resources should be in compliance with the United States government Section 508 for Electronic and Information Technology. Vendors in compliance with these standards should be able to supply their Voluntary Product Accessibility Template (VPAT) for consortia or individual institution subscriptions and purchases. This is an important criterion to include in the CDP regarding the selection of e-resources. This area will grow and evolve as accessibility issues gain increasing legal significance and will require regular updates within the CDP.

All of the above research findings were carefully reviewed and considered as the Oakland University Libraries embarked on the process of creating a modern, relevant, flexible, and therefore useful CDP. These research findings were studied closely in relation to the Oakland University Libraries' specific collection needs and goals. "Collection development policies, in order to avoid becoming irrelevant, need to be dynamic, and not static."⁸³ The author and her colleagues strongly supported this philosophy and incorporated this principle into all aspects of the creation of the library's CDP. In addition to these research findings, the author reviewed other academic library CDPs with her colleagues, and the process of creating their own CDP was ready to begin.

Oakland University: The Library's Experience in Creating a Collection Development Policy

Oakland University is a medium-sized public university with an overall student population of more than nineteen thousand and a FTE of approximately sixteen thousand. Until the recent Carnegie classification modifications for doctoral universities, the university had the Carnegie classification of a doctoral degree granting university at the R3, moderate research activity level. As a result of the recent Carnegie doctoral university classification alterations, the R3 classification was replaced with the D/PU category

for doctoral/professional universities. Subsequently, the university's Carnegie classification was changed to the R2 category now identified as doctoral universities with high research activity. The university, however, is still primarily known as a teaching university serving an undergraduate population. From a headcount of over nineteen thousand students, the large majority of them (approximately sixteen thousand) are enrolled as undergraduates, and about thirty-five hundred are graduate students.⁸⁴ This is an important characteristic in both the library's history and current state of collection development. For many years, the emphasis in acquiring resources was to support a curriculum-based collection with the focus on undergraduate studies. Based on the enrollment characteristics of the university population, this continues to be true. Although areas of faculty research are supported as the budget allows, the driving force behind the bulk of the collection selections are the large undergraduate course offerings and to a lesser degree, the much smaller number of graduate level course offerings.

Oakland University Libraries had not maintained a current CDP. This is not an unusual situation among academic libraries.⁸⁵ A review of the library's annual reports from the mid-1980s and earlier referenced the overall collection primarily being based on support of the undergraduate curriculum. Some of the annual reports also stated the need for a CDP. If a specific CDP document had been created, a copy of it could not be located. Even had one been located, it would have been outdated since it would not have addressed pertinent considerations of twenty-first century collection characteristics and collection development and management activities. These include the complexity of digital resources, institutional repositories, shared resource initiatives, the diversity of formats collected, open access resources, and substantial increases in the acquisition of electronic-only resources. As these newer elements of collecting became more prevalent and ubiquitous, the library faculty strongly felt that the creation of a written CDP was necessary.

One of the most important characteristics of the needed policy was an articulation of criteria for selection. "One does not collect just for the sake of collecting."⁸⁶ Resource selectors should not view "collections as ends unto themselves."⁸⁷ Collecting is selective and should be based on the guidelines provided by a CDP. In the formation of a CDP that would be most helpful for our selectors, the author addressed the following questions: On what basis does the library faculty select resources for purchase? How are requests for resources by students or other faculty evaluated? What are the justifications for rejecting or accepting a resource request? These constituted the major questions that went unanswered due to the absence of a CPD. Resource selection requires the application of human judgment and a written CDP offers guidelines to assist in

the judgment process. A useful CDP “defines a framework and provides parameters” for the selection of resources.⁸⁸ The author’s work was clearly defined as the process began to move forward.

Initial Process: Establishing a Team and Timeline

As the relatively new collection development librarian, the author took the concerns expressed and the feedback received regarding the absence of a library CPD and formed an investigative ad hoc library faculty committee to create a CDP to best suit their needs. A CDP “is most effective if it has aspects of democratic planning.”⁸⁹ She invited all interested library faculty to participate. In addition to supporting this principle of democratic planning, the library faculty possessed specific expertise in various areas that would be valuable for the CDP to address. Having committee members to represent a variety of perspectives, functions, and subject disciplines was beneficial to the process.

The committee was formed at the end of the 2016-2017 academic year, with monthly meetings scheduled for the 2017-2018 academic year. The goal was to have a working draft of a CDP by the early part of the 2018-2019 academic year. Additional meetings were scheduled during the fall term of 2018 to address issues and make minor adjustments to the policy. The finished CDP was completed in early 2019 and posted to the library policy website. It can be accessed at https://library.oakland.edu/policies/collection_development.html.

Prior to the scheduled meetings, the author conducted extensive CDP research and culled and reviewed numerous academic library collection policies, particularly those of peer university libraries. The committee’s early meetings were a review of what the author found to represent best practices for similarly situated medium-sized academic libraries plus other libraries with well formulated or current CDPs. The author, along with the committee, also reviewed the academic libraries CDPs that addressed specific format or access types (datasets, born-digital, and open access resources), the purpose of a CDP, and what appeared to be universal best practices. A review of these elements was coupled with discussions of which sections were pertinent for the author’s library to include in its CDP. Committee members with specific expertise in format types or collection functions would draft sections related to their areas of experience and proficiency.

Making Progress: Drafting, Reviewing, and Compiling the Policy

An initial element of the policy that was addressed early on was that the CDP was to be a statement of policy, not

procedure. It would address why the library collected what it collected, not how. The CDP’s primary purpose was to provide guidelines for the development of a collection that supported the institution’s curricular and research needs as the budget allowed, and established the goals for growing a collection that supported the library’s mission and values. The author shared with the committee her findings that this general, overall purpose of an academic library CDP was well established in the professional literature and was reflected both in CDPs she had reviewed and that were reviewed together. The committee concluded that a similar blueprint would be applicable to their institution. As the committee continued to meet, members agreed that the following sections would constitute the necessary sections for the policy at this time:

- Statement of purpose
- Collecting intensity levels
- Collaboration and resource sharing
- Diversity statement
- ALA and Association of College & Research Libraries (ACRL) statements
- General selection criteria (applicable to all resource considerations)
- Journal selection criteria
- E-resources criteria
- Reference collection
- Digitized and born-digital collections
- Open access resources
- Datasets
- Special Collections & Archives
- Gifts
- Deselection
- Faculty publications

Throughout the 2017-2018 academic year, drafts of the CDP sections listed above were completed or in revision. There are other elements that are addressed in various CDPs, and Johnson includes a comprehensive list of them but notes that all the listed components “might be found in a single policy, [but] such comprehensiveness is neither common nor necessary.”⁹⁰ This is important to consider when a library undertakes the potentially complicated endeavor of producing a CDP that is most useful and relevant for them. To keep the project manageable and applicable to one’s needs and purposes, it is suggested that one judiciously select what would be the most valuable guidelines to include in the CDP. The author and her colleagues decided not to undertake a widespread, comprehensive collection assessment prior to producing a CDP. Although this was once noted as a requisite step in the process of creating an effective CDP, it is not necessarily applicable to all institutions. The author’s library lacked the staffing or time to devote the

energies required for this endeavor. Additionally, as a result of the library's participation in a state-wide shared print monograph retention program, the author's institution had access to a comprehensive database that analyzed both the library's individual monograph holdings and usage, and the collective holdings and usage of eleven participating libraries throughout the state. This data provided an understanding of the scope of the print monograph collection within all the Library of Congress classifications. The library also had a firmly established print monograph approval plan that was adjusted through time to match most closely with the university's degree and curriculum offerings. This provided information on the scope and content of the library's monograph collection. These tools together yielded a basic collection assessment of the library's print monograph holdings. It was determined that the committee could proceed with the production of a useful CDP without engaging in a more detailed collection assessment process.

Oakland University has recently stated, as part of its strategic plan, a plan to increase its research activity. However, as previously described, the history of the library collection policy has consistently been curriculum based, primarily to support teaching and learning. Due to the current university profile and the large undergraduate student population numbers and undergraduate degree programs, the library will continue to have this priority incorporated into its CDP. More sophisticated research level materials are acquired for doctorate degree programs, and to a limited extent for master degree programs. The potential faculty user base and multidisciplinary application are considered for collecting resources to support faculty research. The university's budget limitations force subject selectors to constrict acquisitions of highly-specialized faculty research resources. This area will require continual review.

Collecting Intensity Levels: Based on Levels of Degrees Offered

Considerable thought and discussion were devoted to how the Collection Intensity Levels were described in the CDP. Due to inherent issues with conspectus based CDPs, it was decided that it was more pertinent to describe collecting levels based on the level of degrees offered. The CDP states that the collecting intensity levels within the subject areas for which degrees are offered are determined by the depth of materials needed to support the various degrees and level of the offered degrees. Therefore, the type of resources that are appropriate to acquire for either bachelor level degrees, master level degrees, and for doctoral level degrees are described. Specific collection statements for some formats such as video, newspaper, print, microform, or indexes, are not cited separately. Instead, a general statement notes that resources in all appropriate formats

are considered in support of the three degree levels the university offered.

A major reason that the collecting intensity levels based on degrees granted was most useful for the author's CPD is that the library faculty selectors are skilled in selecting resources to support academic activities within the academic units and schools to which they are assigned as liaisons. Each librarian liaison is well versed in their respective department's course offerings. They are closely acquainted with their liaison academic programs, the relevant teaching and research resources to support these programs, and appropriate resources for each degree level. They sought more guidance from a CDP in the often convoluted, complex format idiosyncrasies and access issues related to resources. This is why the CDP outlined the criteria considerations that were necessary to review when collecting materials in general, then for specific format types such as journal acquisitions, e-resources, datasets, digitized and born-digital resources, reference materials, and open access resources.

Conclusion

This paper offers a perspective on how CDPs have been developed and used in conjunction with current needs and purposes for a CDP. As Oakland University Libraries continue to review the completed CDP, it will be done in consideration of any potential gaps that may need to be filled and clarifications that may be necessary for future revisions. There are not many current published works that address the actual process required to produce effective CDPs. Those that do exist contain some outdated information. More recent library literature addresses the current characteristics of the twenty-first century academic library collections but does not necessarily provide specific steps for creating a CDP relevant to these characteristics. The steps outlined here can act as a more contemporary blueprint for the creation of a written CDP, particularly for a medium-sized academic library. As Oakland University Libraries strive to maintain a flexible CDP, the author and her colleagues recognize that sections of their CDP may require further specificity or will be stated in more general terms. They also recognize that there are sections that they may need to add particularly as resource formats change and evolve. Any library that expends the effort to produce a CDP should understand that the document is "a living, breathing entity that is always thought of, always lived with, always tinkered with, and never quite finished."⁹¹ This philosophy should not be viewed as a drawback. Instead, it is an opportunity to maintain a vibrant yet relevant and useful working tool that assists all library resource selectors.

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