School of Information and Library Science, University of North Carolina at Chapel Hill

INLS 513-002  Resource Selection and Evaluation (3 credit hours)

“We can and should look at collection management as the fundamental integrating factor in the management of libraries, including in its scope collection development, presentation, preservation, organization and access, according to the principles of librarianship, the requirements of society and the possibilities of present and envisionable tools.” Ghikas, M.W. Collection management for the 21st century. In Collection Management for the 21st Century: A handbook for Librarians; Gorman, G.E., Miller, R.H., Eds.; Greenwood Press: New York, 1997; 119-135,

Spring Semester 2013, Tuesday and Thursday, 12:30pm-1:45pm in Room 304 Manning Hall

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Office Hours: Monday and Tuesday, 2:00-3:30 (or by appointment) Room 115-B Manning Hall

Course description:

This course covers the identification, provision, and evaluation of resources to meet primary needs of clientele in different institutional environments. Our class will explore the defining characteristics of collections; the challenges of defining the scope and boundaries of collections; the development of collections that are valuable to one or more communities; issues related to ensuring the sustainability of collections; and legal and ethical considerations associated with selecting, evaluating, collecting, managing, and providing access to information and documentary artifacts in a variety of forms (e.g., reference works, nonfiction, fiction, graphic novels, databases, websites, open access materials).

Collections are, first and foremost, dynamic entities, and many of our discussions will be within the context the “lifecycle of information”—from conception and creation, to selection and storage, to access and evaluation, to long-term preservation, reformatting, and deselection (or “weeding”). Other issues will include an examination of the high cost of serial subscriptions especially academic journals during challenging budget years for libraries as well as the transition from print to electronic materials and the impact on library budgets. Near the end of the semester, discussions will include emerging issues in collection development and management, especially: e-reader devices, digitization projects, self-archiving behaviors, and institutional repository development. Discussions will also include considering ways in which cultural institutions can collaborate in their collecting activities and ways in which the efforts of different types of organizations (libraries, archives, and museums) have begun to converge in the past decade.
Course objectives:

By the end of the course, it is expected that students will be able to...

- Critique recent literature on collections and collecting—from a variety of perspectives and in a variety of settings—in order to understand the major questions, issues, consequences, philosophies, models, and other forces at work;
- Analyze and evaluate written collection development policies with a sensitivity toward the social contexts in which the collections are situated;
- Articulate similarities and differences between the collecting activities of different types of cultural heritage institutions (e.g., academic/public/special/school libraries, archives, and museums);
- Apply a set of heuristics and principles for approaching collection development and management in professional situations (e.g., use of selection aids, circulation statistics, number of pending hold requests);
- Reflect upon their attitudes and practices for the purposes of self-assessing their performance as developing professionals.

Required textbook:


[Note: purchase it new or used, share a copy with another student, or read the copy on reserve at the SILS Library]

Supplementary materials available on reserve with limited circulation from the SILS Library:


Journals and serial publications related to themes in this course:

Collection Management (http://search.lib.unc.edu/search?R=UNCb5819172)
Council on Library and Information Resources Reports (http://www.clir.org/pubs/reports/)
Journal of Electronic Resources Librarianship (http://search.lib.unc.edu/search?R=UNCb5965426)
Electronic mailing lists and entities devoted to collection development issues:

ACQNET mailing list (http://lists.ibiblio.org/mailman/listinfo/acqnet-l)

COLLDV-L mailing list (http://serials.infomotions.com/colldv-l/)

Liblicense-L mailing list (http://www.library.yale.edu/~llicense/ListArchives/)

And on WebJunction: http://www.webjunction.org/collection-development

And on Twitter: @amlibraries, @PublishersWkly, @WebJunction, @LJBookReview, @sljournal

Professional organizations and groups for collection development librarians

Collection Management & Development Section (CMDS)
[A section of the Association for Library Collections & Technical Services, a division of ALA]
Website: http://www.ala.org/ala/mgrps/divs/alcts/mgrps/cmds/index.cfm

Collection Development and Evaluation Section (CODES)
[A section of the Reference and User Services Association, a division of ALA]
Website: http://www.ala.org/ala/mgrps/divs/rusa/sections/codes/index.cfm

The Charleston Conference
[Held annually in Charleston, SC, in early November]
Website for the November 2012 conference: http://www.katina.info/conference/
Archived conference materials: http://www.katina.info/conference/archives.php

Assumptions adopted for this course

- Collection development is a core service in all types of libraries.
- The cost of a library’s collections and their long-term importance to that library and to the world of scholarship in general require that extensive time and effort be spent training new selectors and providing continuing education experiences for seasoned selectors.
- Many selectors will find themselves building collections in subjects for which they have little or no background. Even if a subject background exists, it is not necessarily enough preparation for collection building, which requires an understanding of the individual library and its mission.
• There are micro-collection development training needs which relate to a library’s specific collecting and managing policies and procedures and its specific organizational culture.
• There are macro-collection development training needs which relate to subject knowledge, the publishing world, structure of the literature in a discipline, research processes in particular disciplines, shifting paradigms of electronic and print media, and communication and management skills.
• The selector, to successfully perform collection development and management operations, requires a knowledge of and communication with other library operations such as cataloging, reference, serials, and acquisitions.
• Training cannot wait for in-house tools to be developed, such as collection development policy statements and collection development manuals, because selectors must function immediately in their roles. These in-house tools are an important part of successful collection development and management and should ultimately be developed.


In support of the University of North Carolina’s diversity goals and the mission of the School of Information and Library Science, SILS embraces diversity as an ethical and societal value. We broadly define diversity to include race, gender, national origin, ethnicity, religion, social class, age, sexual orientation, and physical and learning ability. As an academic community committed to preparing our graduates to be leaders in an increasingly multicultural and global society we strive to:
• Ensure inclusive leadership, policies, and practices;
• Integrate diversity into the curriculum and research;
• Foster a mutually respectful intellectual environment in which diverse opinions are valued;
• Recruit traditionally underrepresented groups of students, faculty, and staff; and
• Participate in outreach to underserved groups in the State.

The statement represents a commitment of resources to the development and maintenance of an academic environment that is open, representative, reflective, and committed to the concepts of equity and fairness.

**What this means for our course:** one of the major tensions we explore involves balancing what people/communities might ‘want’ and what they might ‘need’. To a large extent, where we fall on this continuum reflects our personal experiences (which may be accurate or distorted), conclusions drawn from what we read in the professional literature (which may reflect certain contexts better than others), and other forms of “conventional wisdom”. We will look at a variety of examples from practice during class sessions, and I encourage all of us to approach our analyses of these examples with whatever degrees of openness and/or skepticism seem appropriate to enrich our perspectives.
How to succeed in this course
Graduate courses vary with regard to their classroom dynamics, how the literature is approached, and the learning objectives for students. Here are suggestions to illustrate techniques that might help you to prepare yourself for class, efficiently read the required materials, and effectively engage with course activities.

Preparing for class. Of the 10-13 hours you should expect to spend each week on coursework for INLS 513, we spend approximately 2.5 of those hours in class. To make the most efficient use of our time together, my expectations are that students have already completed the required readings for that day, have considered the reading questions and explored any additional resources posted on Sakai.

Completing the required readings. I expect all students to have completed any required readings prior to the class session in which they are discussed. Many of the readings adopt a particular perspective on the world of information services and collections; I expect you to develop your own set of attitudes and opinions about your practices, but in order to position yourself in the field, it is essential that you are able to critically analyze—and sometimes experiment with or role play—the perspectives of other authors. We may not cover each reading with the same degree of depth during class.

Participating during (and reflecting after) class. The majority of our time in class will be spent in hands-on activities and analyses—with examples often drawn directly from practice, from students’ work experiences, and from any earlier coursework—and, as such, you should be confident in your understanding of the readings and the implications that these topics hold for your professional development. Many students may find it helpful to devote time immediately after class to reflect upon that day’s discussions and jot brief notes for themselves to follow up with before the next session. There are many activities that count as ‘participation’, all covered in more detail later.

Writing and editing. Please model any references to other documents in your writing after a “standard” style guide throughout the course—for example, the Publication Manual of the American Psychological Association, the Chicago Manual of Style, or the Modern Language Association Style Manual. If you have any concerns about the quality of your written work for this class, please feel free to share whatever drafts you’ve produced (especially during office hours) or visit the UNC Writing Center (http://www.unc.edu/depts/wcweb/) before an assignment is due.

Here are general guidelines for writing and written work:
(1) Do not presume that the reader can read your mind – anything you want the reader to visualize or consider or conclude, you must provide; (2) Do not presume that the reader feels the same way that you do about a given experience or issue – your argument cannot just assume as true the very things you’re trying to argue for.*


If you want more detailed early feedback, I will typically ask for you to email an in-progress draft to me and to schedule a time to chat with me (approx. 30 minutes) about my comments in person—note: first-come, first-served. It is my intention to make the class interesting and engaging for all of you.
**Periodic assessment of your learning and the class.** In this class, regular feedback on your work—from me and from your peers—is integral to your success. Keep in mind that any criticism you give or receive should be, above all, constructive. Similarly, I am keenly interested in learning which aspects of the course are helping or hindering your learning. I will periodically ask you to perform short assessments of your learning, the effectiveness of class activities and experiences, and the progress you’ve made on your class projects.

**Late work, missing class, and other unfortunate events.** Life is unpredictable, and occasionally circumstances beyond your control may have an impact on your life as a student. Advance notice of any anticipated difficulties is always appreciated.

The University of North Carolina at Chapel Hill Honor Code

Students at the School of Information and Library Science are expected to follow the UNC Honor Code. Essentially, the Honor Code states that all students shall “refrain from lying, cheating, or stealing, but the Honor Code means much more. It is the guiding force behind the students' responsible exercise of freedom, the foundation of student self-governance here at UNC-Chapel Hill. The University maintains an Honor Code because we believe that all members of our community should be responsible for upholding the values that have been agreed upon by the community. A written Honor Code is an affirmation of our commitment to high standards of conduct inside and outside of the classroom.” This information is directly quoted and attributed to the following UNC web site: [http://honor.unc.edu/](http://honor.unc.edu/)

Here is another link to more detailed information: [http://instrument.unc.edu/](http://instrument.unc.edu/)
Course Schedule

Week 1

Session 1 – Thursday, January 10, 2013 – Introduction to the course
Overview and class introductions.
No prior readings required for today:

Week 2

Session 2 – Tuesday, January 15, 2013 – Collecting and collections: I
Read before class.
• Overview of Assignment 1
  • http://vimeo.com/27414701
  • Add your biography to Sakai class site by Friday, January 19.

Session 3 – Thursday, January 17, 2013 – Collecting and collections: II
• Guest speakers Stephen Brooks, UNC Acquisitions Dept. and Luke Swindler, Coordinator of General Collections at UNC

Week 3

Session 4 – Tuesday, January 22, 2013
Defining a collection
Read prior to session:
--AND ONE ARTICLE FROM AMONG THE FOLLOWING; EITHER--
--OR--

Optional background readings:
Johnson, “Introduction to collection management and development” (2009, Ch. 1);
Evans & Saponaro, “Introduction” (2012, Ch. 1)
Session 5 – Thursday, January 24, 2013 – Community needs as unifying principles:

Review of Assignment 1

Read before class.

- Evans & Saponaro, “Assessing user needs” (2012, Ch. 3) [FOCUS ON: “Data collecting and analysis techniques” section (pp. 56-62)]

Week 4

Session 6 – Tuesday, January 29, 2013 – Selection of individual items: ‘Traditional’ resources

Read before class.

- Evans & Saponaro, “Selecting materials” (2012, Ch. 4) [FOCUS ON: “Engaging in selection activities” section (pp. 75-89)]

Session 7 – Thursday, January 31, 2013 - Selection of individual items

*** Community Selection for Assignment 2 is due via email or in person before class begins: ***

Read before class.


Week 5

Session 8 - Tuesday, February 5, 2013 - Selection of individual items: Web-based resources

Read before class.
Session 9 – Thursday, February 7, 2013 - The contemporary monographic publishing landscape
Read before class.
- Guest speaker, Shauna Collier from UNC Stone Center Library (*Instructor attending SLA Leadership Summit in Dallas, Texas).

Choose ONE of the following chapters from:

- Chap. 3: E-books in the School Library
- Chap. 4: E-books in the Public Library
- Chap. 5: The Academic Library E-book

Week 6

Session 10 – Tuesday, February 12, 2013 – More on monographs and core collections.
***Assignment 1 is Due via email or in print before the beginning of class, Resource evaluation/review***
Read before class.
- Johnson, “Developing collections” (2009, Chapter 4)

Session 11 - Thursday, February 14, 2013 – Serials defined, other formats, and the impact of open access publishing
Read before class.
- Evans & Saponaro, “Print, media and related issues” (2012, Ch. 8)
- Guest speaker, Gina Powell from the Library for the Blind and Physically Handicapped North Carolina Department of Cultural Resources, State Library.
Week 7

Session 12 – Tuesday, February 19, 2013 - Emerging topics: Electronic formats and reading devices

Read before class.


Session 13 - Thursday, February 21, 2013 - Licensing and Digital Rights Management

Read before class.


Week 8

Session 14 – Tuesday, February 26, 2013 - Collection development policies: I

Read before class.


Session 15 – Thursday February 28, 2013 - Collection development policies: II

Read before class.


Week 9

Session 16 – Tuesday, March 5, 2013 – Outreach in support of collections
Assignment #2 is due via email or in print before the beginning of class; Community-based resource collection (1 copy/group) ***

Read before class.
• Johnson, “Marketing, liaison, and outreach activities” (2009, Ch. 6)

Session 17 - Thursday, March 7, 2013 – Budgeting
Read before class.
• Evans & Saponaro, “Fiscal management” (2012, Ch. 5, pp. 121-130)
• Johnson, “Policy, planning, and budgets” (2009, Ch. 3)

Week 10

NO CLASS (Spring Recess) – Tuesday, March 12

NO CLASS (Spring Recess) – Thursday, March 14

Week 11

Session 18 – Tuesday, March 19, 2013 - Legal issues related to library collections
Read before class.

--AND EITHER--

--OR--

Optional background reading:
• Guest speaker, David A. Wright, Associate Dean of Learning Resources, Surry Community College, Dobson, North Carolina

Session 19 – Thursday, March 21, 2013 - Resource sharing and cooperation
Read before class.
• Evans & Saponaro, “Resource sharing” (2012, Ch. 7, pp. 161-173.).


**Week 12**

**Session 20 – Tuesday, March 26, 2013 - Sustainability**

Read before class.


**Session 21 – Thursday, March 28, 2013 - Small group workshops on Assignment 3 analyses**

**Be in class today!**

**Week 13**

**Session 22 – Tuesday, April 2, 2013 – Evaluation and assessment**

- Evans & Saponaro, “Evaluation” (2012, Ch. 6, pp. 133-146.)

**Session 23– Thursday, April 4, 2013 - Preservation of collected materials**

Read before class.

- Evans & Saponaro, “Protecting the collection” (2012, Ch. 10, pp.247-268.)

--AND--


- Guest speaker, Mary Boone, former State Librarian of North Carolina

**Week 14**

**Session 24– Tuesday, April 9, 2013 - Reformatting and digitization**

Read before class.


[FOCUS ON: “Recommendations” sections (pp.15+, 23+, 28+; and 33-35)]

[FOCUS ON: the “Principles” for Collections (p. 4), Objects (pp. 26, 48, 51, 52, 55, 57), Metadata (pp.61-62), and Initiatives (p. 86)]

Session 25 – Thursday, April 11, 2013 - Deselection/weeding of collected materials
Read before class.
- Evans & Saponaro, “Deselection” (2012, Ch. 6, pp.148-157.)
--AND--
- Johnson, “Developing collections” (2009, Ch. 5; particularly pp. 151-164)

Speed weeding in-class activity and analysis (group activity and verbal report out from each group)

Week 15

Session 26 – Tuesday, April 16, 2013 - Research and evaluation of collected materials
*** Draft of Assignment 3 due as hard-copies/printed before beginning of class ***
Read before class.

Session 27 – Thursday, April 18, 2013 – Technological infrastructure development for collections
*** Peer reviews of your two classmates' Assignment #3 drafts due as hard copies at the beginning of class***

Read before class.


--AND EITHER--


--OR--


**Week 16**

**Session 28 – Tuesday, April 23, 2013 – Collecting philosophies and reflective practice**

Read before class.


Optional background reading:

- Evans & Saponaro, “Censorship, intellectual freedom, and collection development” (2005, Ch. 18)

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**Session 29– Tuesday, April 25, 2013 - Conclusions, final thoughts, and next steps**

*Assignment #3, Annotated collection development policies***

***Due via email or in Sakai by 11:00am on Tuesday, April 30, 2013 by 12:30pm***

Read before class:


### Assignment Summary

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<thead>
<tr>
<th>Assignment</th>
<th>Percentage of grade</th>
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<tbody>
<tr>
<td>Community selection for Assignment #2</td>
<td>0% (Group)</td>
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<tr>
<td>Assignment #1, Resource evaluation/review</td>
<td>20% (Individual)</td>
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<tr>
<td>Assignment #2, Community-based resource collection</td>
<td>39% (Group)</td>
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<tr>
<td>Small group workshops for Assignment #3</td>
<td>0% (Individual)</td>
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<tr>
<td>Draft of Assignment #3</td>
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<tr>
<td>Peer reviews of Assignment #3 drafts</td>
<td>4% (Individual)</td>
</tr>
<tr>
<td>Assignment #3, Annotated collection development policies</td>
<td>20% (Individual)</td>
</tr>
<tr>
<td>Class participation</td>
<td>16% (Individual)</td>
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<tr>
<td>[Bonus 1% for submitting every assignment on time]</td>
<td>1% (Individual)</td>
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<td>100%</td>
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Based on UNC Registrar Policy for courses ([http://regweb.unc.edu/resources/rpm24.php](http://regweb.unc.edu/resources/rpm24.php)), semester grades will be H, P, L or F for graduate students. Grades for individual assignments will be based on the points obtained on each assignment, weighted by percentages given above, in order to calculate final semester grades. Numerical grades for the course as a whole will roughly translate into the following letter grades:

- 98.0 - 100% = H (High Pass)
- 80.0 - 97.9% = P (Pass)
- 65.0 - 79.9% = L (Low Pass)
< 64.9% = F (Fail)

If you have any questions or concerns about your grades in this course, please feel free to ask me. My expectation is that all of you will do well and pass the course with a solid P; some members of the class will do outstanding work that will merit an H.

Final notes

Above all, enjoy yourself, learn as much as you can from this experience, and be open to where your interests in this broad topic might take you. I am here to help you succeed—both by creating an environment that supports your explorations and by pointing you in the direction of resources which you will find useful in developing your skills and knowledge as a reflective practitioner. My major interest is in your learning which will best proceed as we share questions, answers and experiences.