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THE DIGITAL TYPHOON: ISSUES AND TRENDS IN COLLECTION DEVELOPMENT

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ABSTRACT

This paper will examine the current factors confronting academic library collection development, with particular reference to Asia, Australasia and the United States. The author discusses the re-emergence of collection development disciplines in coping with digital content and reviews methods of using and adapting these methods to achieve the stated goals of academic libraries. The author also discusses the changing role and evolution of commercial vendors and how academic libraries and consortia can position themselves to both influence and take advantage of supplier services.

1. THE FISCAL LANDSCAPE: DIGITAL AND PRINT

My intent is to stimulate discussion and to provide some modest food for thought regarding how the current issues and trends in collection development and acquisitions, having chiefly evolved and been applied in a print environment, are being adapted to, and integrated in, the more lightly explored territories of relevant electronic, non-book and other non-traditional content. To say that the situation at present is fluid would be a huge understatement. The hazy vista that now confronts libraries challenges us to examine our past practices and the tools we use in new ways.

When the unwelcome Christmas present that was Cyclone Tracy flattened Darwin in 1974, it was a natural disaster of legendary proportions. I won't belabour the comparison nor make light of that tragedy, but the commercial, funding and bibliographic typhoon that confronts libraries has been equally sweeping in its metaphorical effect. Darwin recovered and thrived and so can libraries. In the past twenty years, I have worked with over 90 universities, their librarians, academics and researchers in designing, creating and maintaining collection development structures like approval profiles, retrospective projects, opening day collections and the like. In all that time, the winds have never ceased to blow. Ten years ago, Steve O'Connor and I wrote a paper delivered to a College and Research Libraries conference in Atlanta called *"Collaborative Purchasing: a Model for Financially Straitened Times"* [1]. In it we described the declining state of English language monograph purchasing by libraries and discussed practical solutions, such as shared and consortia profiling, to combat, or at least mitigate, the looming financial and intimidating structural causes of the crisis.

The facts are sobering. The percentage of English language monographs, serials and digital resources purchased by academic libraries worldwide is diminishing even more rapidly. The cost of this material continues to increase as does the cost of its delivery—digital resources platforms and the metadata needed to populate and support them are most definitely not cheap. Library budgets are shrinking or remaining static. Increasing numbers of students and academic staff have created enormous pressures on libraries. For example, some universities in Australia have increased student numbers by over 50% in the past fifteen years without concomitant funding. CAUL, the Council of Australian University Libraries, in their Statement of the Global Economic Crisis [2] of April last year, made a number of predictions including a contraction of libraries for the foreseeable future, unpredictable exchange rates, movement toward high-use collections, more outsourcing to vendors, uncertainty around long-term commitments and an acceleration of the move toward electronic resources.

In the United States, the situation is much the same. Both public and academic libraries are seeing huge increases in patron use as the economic downturn leads its victims to access employment resources found in libraries and go back to school to improve their chances in the shockingly bad job market. The Association of Research Libraries (ARL) has looked at issues and trends in scholarly communication and published an environmental scan called *Transformational Times* [3]. In it, the ARL reports that nearly all members will be cutting journals, databases and other content acquisitions which will cause new stresses on the publishing industry. They, too, are hampered by long-term journal bundle commitments and are predicting more serial cancellation spirals. They predict more dire consequences for the print monograph and increased movement toward digital resources. The ARL identifies small publishers and members of scholarly societies as potential casualties of these trends and urges, without any specific recommendations, that new kinds of educational outreach be created to help them.

While Australia has weathered the global economic crisis better than most, it is not yet over for libraries. In the reissue of their "Statement on the Global Economic Crisis and its Impact on Consortial Licenses" of June of this year, the International Coalition of Library Consortia (the ICOLC), stated quite explicitly that it, *"…did not overestimate the severity of cuts to library and library consortia funding levels in its original Statement* [of January 2009]. *Furthermore, we believe the worst may still be before us."* [4]

Many academic and scholarly librarians have done an excellent job of imposing collection development discipline to their print collections. This discipline is largely informed by what is considered relevant combined with what is considered affordable. Professional collection development is an exercise that is not easily measured or reduced to a metric. It is the considered application of a body of expertise confined within a methodology. Successful methodologies, such as profiles and approval plans, are well-known in the Asia-Pacific region and throughout the world, and have been described and evaluated exhaustively in the literature. However, librarians often struggle with the integration of e-books, journals, subscriptions, AV material, web content, RSS feeds, podcasts, wikis, and other content within these traditional, and still useful, structures.

2. CONSORTIA

Over the past fifteen years, the emergence of consortia in the academic market worldwide has been impressive. From OhioLink, the CIC and OCUL in North America, to ARLAC and WAGUL in Australia, to CONZULAC in New Zealand, to the geographically-based consortia in the UK, to the Singapore Polytechnics, academic libraries have sought to improve discount with their vendors by defining and controlling market share. The hapless vendors were given no choice but to deal with these new giants on the giants' own terms. The result has been a sharp increase in discount to libraries and a shortening of vendor margins.

With the notable exception of OhioLink, which, among other things, provides incentives for its members to avoid duplication, the question of collection development has been largely missing in this scenario. A year after writing that paper with Steve O'Connor, I gave a presentation at the Collaborative Collection Development Conference sponsored by CAVAL in Melbourne called, "*Beyond the Buying Club: New Strategies for Profiling and Collecting Relevant Content*" [5], in which I argued that, having formed consortia, libraries should utilize the strategic advantage of these large combinations to impose rational decisions regarding the purchase of content and its distribution among the members. At the time, this didn't make much of an impression. However, in recent years the practice of collection development has undergone a bit of rehabilitation in some, but not all, quarters. In Australia, the importance of collections was reinforced a few years ago with the creation of the Collections Council of Australia to represent the shared interests of archives, galleries, libraries and museums. Among its terms of reference are to advance the stability and sustainability of the collections sector and promote benchmarks and standards for the care and management of collections. Sadly, the CCA lost its funding from the Cultural Ministers Council in October 2009 [6].

4. DEFINING COLLECTION DEVELOPMENT AND ACQUISITIONS

Collection building assumes that the library supports both the research requirements of its academics and the core needs of its undergraduate and post-graduate students—whether by acquisition or access. Regrettably, many libraries do not have the luxury of time, money, the subject expertise on staff, or the practical and streamlined workflows required to build these collections. Subject bibliography is a conscious, measured and informed building of collections in discrete disciplines, but is seen less and less outside of the very largest research libraries. Some librarians report they are able to devote as little as 5% of their time in collection building activities. Many complain that their administrators do not value review and selection as it is not easily measured, benchmarked or otherwise statistically defined. Ideally, collection building is a collaborative and painstaking title-by-title enterprise whose benefits are, like oxygen, invisible but absolutely vital to our culture. As a professional pursuit it has a great deal of appeal to many librarians, but on a day-to-day basis, it is often pushed aside or abandoned entirely in favour of other priorities. Compounding this situation, many are now tasked with showing return on investment for their efforts. Efforts to benchmark collection development and acquisitions in this way, such as those at the University of Wales, Bangor to the University of Illinois at Urbana-Champaign, have been less than helpful and are focused almost entirely on grant monies received.

When unmediated by trained collection development librarians, the effect on library purchasing and collections can be profound. For example, when left to academics alone, collections are often very deep in those research areas that interest individual academics, but very shallow elsewhere. This is seen in its most extreme form in the lack of support for core undergraduate material—an area where the print or digital monograph is just as important as it ever was. Too often, librarians viewed this as either something they could do little about, or something that didn't matter enough when compared with other priorities.

In the last ten years, libraries throughout the world have become increasingly dependent on supplier methodologies to support both their selection and acquisition work—in all formats. This has meant abandoning old ways of doing business and the arms length relationship that too often characterized the library/supplier relationship in the past. It is frequently a component of the library's attempt to re-define its role or lift its profile within the larger academy. The emergence of true approval plans, collection evaluation, and other collection development constructs in recent years in regions where they have been historically absent is testament to this.

6. PROFILING METHODOLOGIES

Carving is one of the oldest sculptural techniques. It is a subtractive process; starting with a solid block, the sculptor removes material using chisels and other tools to reveal the finished form. Profiling is very similar. Successful profiles are best described by what they deselect. Done correctly and evaluated regularly, what remains after the application of this subtractive process is the relevant bibliographic residue--the content of most useful or interesting to the institution. Ideally, this is a collaborative process where the selectors' instructions regarding subject, press, format, etc. inform the vendors' structural methodologies. Modern profiles are themselves a product of the librarian as selector or bibliographer model of discovery and acquisition. They can only completely flower where a shared understanding of bibliography, description, publishing and classification are present. Profiles can only be cultivated; they don't produce their own seed.

During the great North American vendor wars of the late 20th and early 21st centuries, the print approval plan was the coveted prize. Many academic libraries spent up to 80% of their monographic budget on approval books and ancillary services. The emergence of the large consortia made this prize even more attractive—and critical to win. The three chief outcomes of these wars were a steep increase in discount given to libraries and consortia (the ARLAC consortium in Victoria and South Australia being a leading example), a huge investment in development of web-based interfaces and related workflow support, and a massive development and enhancement effort around profiling methodologies. Librarians demanded that these methodologies be precise, nuanced, comprehensive, predictable, cheap, and seamlessly supported by web-based databases and cataloguing metadata. Some vendors rose to the challenge, others did not.

As academic libraries move more and more of their acquisition and access purchasing toward digital resources, those that want to maintain collection development discipline over their collections correctly ask if profiling methodologies developed for print can usefully be modified for digital and other objects. When stretched beyond their historical use, some of these profiling methodologies are showing a bit of wear and revealing their structural limitations; others have vanished. For those still standing, their underlying architecture is now going on 20 years old or more and is perhaps pushing the limits of capacity.

The sheer amount of digital communication, much of it stubbornly resistant to the application of traditional metadata and methods of description, is daunting. One of the hallmarks of approval profiles has always been the timely receipt of profiled titles or notification of wanted titles immediately upon their publication. Timeliness and currency remain important factors in satisfying users and in streamlining library workflow. However, very few publishers produce their print and digital analogs simultaneously. Often the digital version follows months, or even years, later—after the print book is out-of-print. Do libraries wait for the e-book or do they buy the available print version? Vendors, used to selling precision, now grapple with how to accommodate the nuance wanted by selectors without the "book-in-hand" to which they are accustomed. For material that is "born digital" the problem is compounded. Profiling has an important role to play in identifying this material and in making it discoverable to researchers and archivists, but the basic structure of vendors' methodologies has to be flexible enough to accommodate major change.

7. VENDORS, SUPPLIERS AND AGGREGATORS

Library collection development is now so intertwined with vendors, suppliers, aggregators and third-parties such as bibliographic utilities that it could define the word symbiotic. A dizzyingly vast amount of opinion has been expressed over the years suggesting that libraries are "cutting a stick to beat themselves with" in demanding more and more of their vendors—particularly with regard to price and value-added services. Vendor margins are now razor thin. Yet they still find themselves in the middle—squeezed on one side by the demands of publishers and aggregation partners, and on the other by the increasing needs and expectations of their library customers. Some vendors have disappeared or been absorbed. A few survivors have taken on massive debt in chasing the market share that will enable them to achieve new economies of scale and fight on. Others are playing a more tactical and reactive game by positioning themselves to quickly take advantage of market factors, new technologies and opportunities when they appear. Still others still are simply floundering and hoping to hang on a while longer. More than ever, libraries need to take an approach of enlightened self-interest to the partnerships they form with vendors. If they do, they can significantly influence the research and development that will define their collection development aspirations into the future.

Print-on-demand technologies hold great hope for publishers, vendors and libraries. For publishers if offers a new production and business model that solves the vexing question of how many copies to print. Too few and they lose sales when the title goes out-of-print, too many and they end up pulping books—a costly enterprise. Print-on-demand means that books are not printed unless they are sold. Publishers can simply provide a digital file instead of maintaining a warehouse and outsource the production and distribution to third parties. For vendors, especially those with a global reach, print-on-demand has the potential to literally help them survive. Apart from the cost of the books themselves, the biggest cost to vendors is shipping—most commonly air freight to international destinations. If titles can instead be printed and shipped from local or regional facilities, the cost of shipping will be greatly reduced. One huge benefit to vendors and our planet is that the print-on-demand capability will greatly reduce the carbon footprint caused in global shipping. For libraries, print-on-demand can mean that they can get printed books more quickly. Print-on-demand facilities, as warehouses of digital content, also have the potential to serve as a convenient solution to the question of how best to preserve local digital content.

The days of the "gentleperson" bookseller like John Secor, John Coutts or Miles Blackwell are rapidly shrinking to a vanishing point in our rear view mirrors. Many providers are now owned by private equity firms and are under pressure to increase value and show a profit large enough to quicken pulses among the venture capitalists on Wall Street, Silicon Valley and beyond. Others, chiefly publishers, are subsidiaries of public and private universities that labour under their own financial constraints and cautions. Increasingly, these commercial entities will seek to transfer this pressure to libraries in the form of reduced discounts, higher prices, additional fees and attenuated service. When Australian consortia tender again it each will be confronted by a commercial landscape significantly different than the one it encountered previously. The acquisition of Blackwell by Baker & Taylor/YBP late last year has created a near monopoly in print and digital monograph supply in some markets and the recent suit by SkyRiver asserting monopolistic practices by non-print giant OCLC are but two manifestations of this new reality. Librarians must provide the expertise needed to enable the best vendors to thrive and grow while making certain that their institutions enjoy the best value for money, the highest quality and the most comprehensive service possible.

8. CURRENT BEST PRACTICE FOR DIGITAL CONTENT ACQUISITION

Speaking last June on Radio National's The Book Show during the Australian Book Association meeting, David Taylor, President of Lightning Source, a leader in the print-on-demand market, declared that *"...the future of the book is very healthy*" [7]. Robert Darnton, in *The Case for Books*, champions libraries and books, stressing that *"…we cannot reduce our acquisitions of printed monographs until we have solved a great many problems, above all the problem of preserving digital texts*" [8]. Ironically, Darnton's ode to the printed monograph is available as an e-book.

Before looking at the issues and trends for collection development with respect to digital content, it is worth considering that even STM publishers derived only 10% of their sales from e-books in 2009. Yet most scholarly publishers now have to have both print and digital infrastructures. Some are going it alone while others are turning to third-parties to outsource some of this work. The printed book is not yet dead, but it is on life support in academic and scholarly libraries. As a consequence, the business models that publishers and vendors have reliably used over the years are now under unsustainable pressure. Libraries may be disinterested in format—whether it is a book, a journal, an article or an object, in the end it's all just potentially relevant content.

So, in practice, how are libraries buying e-books? Academic libraries now employ four basic approaches for purchasing e-books. The first and oldest method is the package or big deals offered by publishers and vendors. These are relatively cheap to purchase on a per book basis, but can be duplicative across a library or consortium and usually feature very little in the way of professional collection development. A broad subject or publisher package doesn't count. The use of e-books by patrons purchased in packages is also relatively low.

For many libraries and consortial brokers such as CAUL in Australia, this is just fine. The CIC libraries in the United States report that they are happy with the big deals, can afford them, and see no need at present to apply a more refined collection development approach to their purchasing. Others have had a different view for some time. Librarians have long complained that they have no control over the content of these deals and that they often lack current content. It is debatable whether this business model is sustainable over the mid and long term.

The second method is title-by-title purchasing. It is expensive when compared to package deals, but is controlled by a collection development discipline imposed by selectors similar to that of print material. This method is often guided by existing print collection development policies. In general, titles acquired in this way have greater patron use than those from packages.

In recent years, we have observed a great variety of patron-driven methods of acquiring e-books. Typically, e-book access, supplied by aggregators, is provided in the library's catalogue and titles are purchased based on "hits" or use of the titles. Seminal work was done on this method by Swinburne University in Australia and documented in an article by Gary Hardy and Tony Davies called "*Letting the patrons choose - using EBL as a method for unmediated acquisition of ebook materials*" [9]. In subsequent practice, however, the need for some mediation was painfully evident as budgets were blown out and inappropriate material was purchased. That mediation is governed in the first instance by controls and caps on spending for these projects and in the second instance by the application of collection development principles or profiling in defining the scope and nature of the titles eligible for purchase. The advantage for libraries is that, by definition, all titles selected and acquired are used by patrons.

The fourth method is the most recent and, as yet unproven, and brings collection development full circle—the e-book approval plan. Efforts are underway at Arizona State University, Nova Southeastern University and a few other places to see if approval methodologies, given the challenges I described earlier, can cope with e-books. If they can, e-book purchasing will be cheaper, more easily distributed across libraries or members of a consortium, and strictly controlled by collection development discipline. Indeed, the patron-driven models under development could also be encompassed in an e-book approval plan by incorporating profiled access to e-book titles in lieu of purchase or by making e-metadata available to selectors and users as an outcome of the vendor's profiling process.

9. FUTURE ISSUES AND TRENDS

The future of issues and trends is as yet unwritten, but it may well include new methodologies for acquiring and profiling electronic journal content—down to the article level. Mid-sized and small academic publishers are looking hard at how to increase their market share, while libraries, as mentioned, tire of the Big Deal. In combination with third-party organizations, work is being developed to apply descriptive profiling terms to journal articles so that libraries and consortia may be more precise and nuanced in what they discover, acquire or access. Much of this work is, at present, "blue-sky" and confidential, but holds great promise. It also dovetails nicely with Principle 3 of the ICOLC's statement referenced earlier, "*We encourage publishers to allow their content to be made available* *through numerous vendors appropriate for their subject matter. We also encourage online providers and aggregators to allow their metadata to be included in emerging discovery layer services on a non-exclusive basis. Multiple access platforms will permit libraries and consortia to select content and discovery tools that are suitable and affordable for their constituents. We encourage vendors to provide options that match the range of needs that libraries have for any particular content as to degree of importance, currency, interfaces, access, archiving, preservation and metadata. It is in the common interest of publishers, database vendors, consortia, libraries and information consumers to work collectively to provide affordable access to licensed content, while preserving the businesses integral to our collective success.*"

Finally, librarians, as custodians of our culture, need to remain vocal in making their expectations known to vendors, publishers, aggregators, their larger academies, and their private and public funding bodies. World class collections are not created in a vacuum and they do not spring forth spontaneously. The expertise and innovation that resides within libraries and the academics and researchers in the university needs to be recognized, nurtured, rewarded and practically employed. If it is, we can all weather the digital typhoon.

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