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Biz of Acq — A Mentor's Manifesto: Moving from Legacy to Innovation

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As change abounds in libraries owing to a vast array of macro shifts, acquisitions and collection development feel the impact of fixed or declining budgets, evolving and emerging technologies and electronic resources, and a host of uneasy prognostications about change in acquisitions and even the fate of libraries.^{1, 2} While all types of libraries are affected by macroeconomic changes and fiscal policy, acquisitions and collection development are discussed here largely in the context of academic libraries and supporting university curricula. Strategic needs are as varied as the many individual libraries and their circumstances, but the need is universal for thoughtful leadership in navigating change. While workflows adapt to changing environments in the short term, long-term shifts require thoughtful leadership and long-range thinking. As libraries and collection management navigate continuing shifts, businesses face similar challenges; this article distills strategies' philosophical underpinnings from library and business scholarship.

Environmental Scan: A Brief Recap

As print collections and paper-intensive processes wane, the shift leaves in its wake a host of legacy tasks not quite discontinued but waiting to evolve into newer and developing task realms. Concurrently, the growth in electronic resources, mobile devices, and content bundles brings new tasks which affect workflows and necessitate new skills and training strategies. As budgets are at best stagnant while tasked with serving the continually evolving needs of growing and diversifying academic programs, the resulting landscape requires considerable skill in making the most of existing resources to serve the library user communities and their content knowledge needs. Already finite shelf space shrinks considerably as library spaces are reconfigured for the 21st century through redesign to accommodate more computer workstations, technology-infused collaborative workspaces, group study areas, and individual study spaces; less shelving remains, driving the need for weeding projects. In ways similar to the disciplines-supporting work of getting the most from constrained budgets, weeding shares heavy reliance on old-school collection-evaluation skills to bring about meaningful rather than short-sighted culling of old imprints based on circulation data. Another important dimension factoring into weeding decisions is centered on academic programs' changes in focus and depth. Evolving programs rely on historic background material where in the past that historical background may have been less important to the programs' prior

scope. Inclusion or exclusion from core titles lists such as *Resources for College Libraries*, *Doody's Core List*, and any discipline-focused benchmark collections appropriate to the particular situation is also important to meaningful weeding or retention decisions. On the technologically opposite side of the spectrum, libraries are tasked with supporting the increase in distance education. Libraries can shine here as intellectual partners of professors and students by connecting in-depth knowledge of the publications marketplace with in-depth knowledge of the campus curricula. As can be expected in the face of changes, literature abounds along the entire spectrum, preaching imminent obsolescence on one end and on the other end of the demise/hope continuum a new knowledge-based golden age for libraries.

So what do these shifts really mean, and what is a library's best response? What strategies make sense for acquisitions and collection development? For answers, the library literature provides contextual backdrop on the state of affairs in the library and information world. For practical solutions and strategies, the business and management literature has much to offer; libraries share many of the operational dynamics of businesses:

- Services (and some specialized scholarly products)
- Technologies
- Workflows
- External influences and challenges
- Employees with skills and anxieties in the face of profound shifts
- Management strategies for navigating the shifts.

For a sense of the key issues, an extensive literature search of library and business writing since 2002 yielded 205 especially pertinent library and business articles on acquisitions, collection development and management, and change management. Using Voyant Tools,³ a text-reveal of the articles' titles (with filler words removed) resulted in the following cloud showing the frequency of occurrence of words in the articles' titles. Visually, this provides an at-a-glance overview of the most pressing issues by relative importance, easing quick identification of key issues and concerns.

Gleaned from both library and business literature, this text cloud shows that while libraries and collections are at the center of inquiry, "change" shares the top prominence spot with "libraries." The most pressing issues are in fact more universally related to leadership, management, change, organizational development, the modern age, 21st-century realities, and future paths and potential.

The next text reveal image resulted from visual analysis of the subject terms describing the same 205 library and business articles. This text cloud gravitates in similar ways to management, collection development, acquisitions, organizational matters, and development (staff, collections, organizations). Compared to the articles' titles, the subject descriptors of these articles emphasize employees, electronic (i.e., resources and access), archives, information, and services more prominently, while the titles' heavily used word "change" is markedly absent here.

In addition to management and leadership, both graphs share social and psychological elements of management, organizational factors, development (of staff, resources, trends), as well as skills and thoughtful leadership. While libraries share many challenges and face some situations unique to their particular organizations, thoughtful leadership is key to successful roles for libraries and collections.

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Biz of Acq *from page 58*

Thoughtful Leadership, Meaningful Transitions

Libraries are buffeted from all sides by budgetary constraints, detractors questioning the continued value and relevance of libraries, the shock value of drastic cuts in some research libraries,⁴ the lure of the next and newest business models, the temptation to adopt every new development for fear of appearing behind-the-times without them. Thoughtful leadership is crucial for taking a more discerning eye to all the shifts and asking the core question: what creates value, and how can the library's resources and talents be best concentrated on value? Leadership always, but especially in turbulent times, requires integrity, trust, respectful sensitivity to employees' fears, and thoughtful mentoring in helping workers retool and apply their skills to new and evolving forms of creating value for the library (and, by extension, creating value for the parent institution of learning and thereby for society at large).⁵ Thoughtful leadership focuses on helping workers continue to create value. Mission serves as the strategic guide to reimagined workflows around evolving needs.⁶

Core to thoughtful leadership is articulating what creates an organization's enduring value, making sense of shifts, and translating

those shifts into reorientation strategies in keeping with the creation of enduring value. For library acquisitions and collection management, the proliferation of business productivity technologies, information technologies, and online research resources has set in motion a continuing shift from print to electronic collections. A twin development with implications for libraries and collections is the growth of online education, both in terms of competition in the higher education arena previously dominated by brick-and-mortar colleges, and in terms of traditional universities' development of online programs to expand the reach of existing academic programs, especially in reading- and theory-intensive graduate studies.^{7, 8} While the shift from print to electronic materials hints at an exit strategy from legacy tasks and migration plan toward new tasks, most new and evolving work in acquisitions, collection development and management, cataloging, and systems develops ad hoc as the result of immediate need. Libraries' collections and collection management continue to derive meaning from close links to the university's content-driven academic programs which are a broader and more enduring mandate than specific tasks locked into any particular generation of business models and processes. The actual shape of meeting individuals' knowledge needs is continually evolving. Technologies are harnessed for new ways of meeting community needs.⁹ Resource and

format needs are customized by discipline through informed decisions for making the best use of limited collection budgets.¹⁰

While proactive libraries are adept at adopting and managing new resource models and technologies, libraries also need a long-term strategy for workflow and resource shifts in the broader context. What core characteristics ultimately create the most enduring value for the library? What shape should acquisitions and collection management take to undergird the university's teaching and research missions? Change leadership at its best fosters creativity by encouraging problem-seeking and crafting solutions with a firm eye on user communities' enduring yet evolving needs for information, knowledge, study, and scholarly collaboration.

In an academic setting libraries' most enduring value is created through understanding the world of knowledge and through strong working relationships with professors and students. Despite shifts in technologies, evolving electronic resources and devices, and changing business models, collection management's greatest contribution is understanding the subject matter taught in its university, the interrelations and cross-disciplinary connections between the numerous academic programs, evolving teaching models and student needs, leveraging this understanding to connect learners with knowledge, and knowing

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how the library's collections support the learning enterprise.^{11, 12} Ongoing dialogue with library constituencies is key to staying current on evolving needs and envisioned directions. Truly understanding what users need brings enduring value to the mission of connecting learners with knowledge, regardless of the actual forms taken by information technologies, format of resources, and business models.^{13 14 15}

Inventorying Skills and Interests and Mapping Talents to New and Evolving Work

Inventorying skills within the library catalogs the talents already on hand. Environmental shifts make it crucial to have a working knowledge of existing skill sets for mapping out skill gaps and training strategies. Taking inventory of existing shifts and long-term library vision creates context for skill-building, workflow reorientation strategies, and meaningful matching between individual skills, aspirations, and strategic directions for the organization.¹⁶ Inventorying of interests helps match new tasks with those temperamentally best suited for them and assists with broader strategies for training and reorientation.¹⁷ Cross-training builds cross-functional knowledge and perspectives, leading to more informed redesign of workflows¹⁸ while mentoring and peer coaching promotes skill growth, professional development, and exchange of knowledge across skill areas.^{19, 20}

Acquisitions and collection management skills cluster around:

- Understanding materials' efficacy in supporting the curriculum and user needs,
- Supervision
- Planning
- Budgeting and accounting
- Vendor relations
- Business technologies
- Data analysis
- Research design.

Support staff skills cluster around:

- Investigative skills
- Inventory and records management
- Electronic data management
- Cataloging and indexing

Additional talents include:

- Writing
- Public speaking
- Teaching
- Subject expertise
- Foreign language skills
- Cross-cultural understanding
- Computer programming
- Web and graphic design
- Understanding information architectures
- Understanding the intellectual purposes served by library resources.

These skills are widely applicable to the new and growing areas of:

- Digital rights and licensing
- Electronic resources for multiple platforms and mobile devices
- Collaborating with publishers and aggregators in curating subject-specific ebook content
- Institutional repositories
- Creating access to historical collections
- Digitization projects
- Dataset readability projects
- Promoting the library
- Collaborating with professors in harnessing open access for sharing scholarship
- Curating and creating online knowledge content for online instruction in close collaboration with professors
- Active roles in course-assignment design
- Helping international students navigate American-style inquiry and library research
- Assessment in libraries in higher education.^{21, 22}

As change permeates acquisitions and collection management, the constant pull of new technologies and business models, especially when paired with budgetary pressures, can distract from the library's intellectual strengths of supporting learners' quest for knowledge. In times of rapid shifts, the need for long-range thinking is even more acute: Forward-looking, future-oriented library and collections strategies are most effective when focused on meeting user communities' needs and embracing evolving tools in context.^{23, 24}

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