Instructor: Kathleen Folger
E-mail: kfolger@umich.edu
Phone: (734) 764-9375
Office: 312 North Hatcher Graduate Library
Office Hours: Monday, 2-3pm; Thursday, 8:15-9am; other times by appointment
Class Time: Friday: 1:00-3:50pm
Class Location: Lecture Room 1 MLB

Course Description: SI 620 introduces principles and issues of collection development and management. The class considers evaluation criteria, resources and procedures for selecting and acquiring information products in all formats (print, audiovisual, electronic, etc.). It covers collection policies; collection description, evaluation, maintenance and preservation; document delivery, vendor plans, fund allocation, intellectual property and resource sharing.

Course Objectives:

1. Become familiar with the terminology and jargon of library collection development and management.
2. Understand methods for selecting, acquiring, and deselecting materials.
3. Learn how to assess user needs for materials.
4. Gain experience evaluating existing collections.
5. Develop expertise in the formulation of collection development policy guidelines.
6. Appreciate the personal, social, ethical, moral, and legal consequences of collecting decisions.
7. Become familiar with how different types of institutions, e.g., special libraries, public libraries, school libraries, archives, digital repositories, approach collection development activities.
8. Understand current trends and future directions in the ecology of information selection and evaluation

NB: 3rd edition is an acceptable substitute

Additional Readings: Additional required readings are specified below. Links will be provided to online versions.
**Academic Integrity**

At the University of Michigan and in professional settings generally, academic honesty and responsibility are fundamental to our scholarly and professional community. Students are responsible for maintaining high standards of conduct while engaged in course work, research, dissertation or thesis preparation, and other activities related to academics and their profession. Unless otherwise specified in an assignment, all submitted work must be your own original work.

Plagiarism is an extremely serious matter. All individual written submissions must be your own, original work, written entirely in your own words. You may incorporate excerpts from publications by other authors, but they must be clearly marked as quotations and properly attributed. You may obtain copy editing assistance, and you may discuss your ideas with others, but all substantive writing and ideas must be your own or else be explicitly attributed to another, using a citation sufficiently detailed for a reader to easily locate your source.

All cases of plagiarism will be officially reported and dealt with according to the policies of the Rackham Graduate School. There will be no warnings, no second chances, no opportunity to rewrite or revise. All plagiarism cases will be immediately reported to SI's Dean of Academic Affairs. Consequences can range from failing the assignment (a grade of zero) to failing the course, even expulsion from the University. For additional information about plagiarism, see the "Academic and Professional Integrity Policy Statement" in the SI Master's Student Handbook (accessible through the SI Intranet), the Rackham pamphlet "Integrity in Scholarship," and "Understanding Plagiarism" links recommended by the U-M Libraries. If you have any doubts about whether you are using the words or ideas of others appropriately, please discuss them with the professor or instructional aide.

**Students with Disabilities**

If you need an accommodation for a disability, please let me know at your earliest convenience. Some aspects of this course -- the assignments, the in-class activities, and the way we teach -- may be modified to facilitate your participation and progress. As soon as you make me aware of your needs, we can work with the Office of Services for Students with Disabilities (SSD) to help determine appropriate accommodations. SSD (phone: 734-763-3000) typically recommends accommodations through a Verified Individualized Services and Accommodations (VISA) form. Any information you provide will be treated as private and confidential.

**Student Mental Health and Well-Being**

The University of Michigan is committed to advancing the mental health and wellbeing of its students, while acknowledging that a variety of issues, such as strained relationships, increased anxiety, alcohol/drug problems, and depression, directly impacts students’ academic performance.
If you or someone you know is feeling overwhelmed, depressed, and/or in need of support, services are available 24/7/365. For help, contact Counseling and Psychological Services (CAPS). Call CAPS anytime -- during and after hours, on weekends and holidays -- at (734) 764-8312. CAPS now has counselors physically located in schools on both North and Central Campus. You can also consult mental health services at the University Health Service (UHS) at (732) 764-8320, or its Alcohol and Other Drugs page.

For a more comprehensive listing of the broad range of mental health services available on campus, please visit the U-M’s Mental Health Resources page.

Classroom Conduct

You are welcome to bring your personal computers to class and use them for taking notes and checking online sources that come up during class. You are discouraged from using them for doing activities that do not pertain to SI 620 -- checking email, working on coursework for other courses, surfing the web, doing Facebook and comparable social networking tasks, etc. Please use your judgment when distinguishing between SI 620 coursework and non-coursework.

You are discouraged from using cell phones during class. If you receive an emergency call, please relocate unobtrusively from the classroom to take the call. If you must leave class, please notify the instructor as soon as reasonably possible.

If you are in need of a break, please excuse yourself from the classroom quietly.

Please give your full attention to guest speakers. They are experts in the area of collection development and you can benefit from their knowledge

Expectations

- High grades begin and end with high motivation. Read assigned readings, take notes when guest speakers give their presentations, and immerse yourself in the study of your select library.
- In this class, participation is expected. Whether we discuss readings, review assignments, or hear from practitioners, please be prepared to express your opinions on substantive issues, and question your peers, the instructor, and guest speakers.
- Please message the instructor with questions, concerns, requests for guidance on assignments, etc.
- The instructor reserves the right to change readings, dates, and scheduling at any time during the semester. If substantial changes are made, an updated course outline will be published online and announced via email
- Obviously accidents, emergencies, and other unforeseen events can occur during the semester. In the event of such happenings, please inform the instructor by phone or email as soon as possible and then come by during office hours or by appointment to discuss any special needs.
Weekly Outline

The following outlines the schedule for major topics to be covered. During most classes, there will be a speaker for half of the class and the other half of the class will be used to discuss material from the textbook and additional readings or small- or large-group activities.

<table>
<thead>
<tr>
<th>Week</th>
<th>Date</th>
<th>Description</th>
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<tbody>
<tr>
<td>1</td>
<td>1/11</td>
<td>Syllabus review including course outline and reading list. Introduction to collection development</td>
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<tr>
<td>2</td>
<td>1/18</td>
<td>Books and Ebooks</td>
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<tr>
<td>3</td>
<td>1/25</td>
<td>Publishing and Ebooks. Guest Speaker: Charles Watkinson, Associate University Librarian for Publishing &amp; Director, University of Michigan Press</td>
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<tr>
<td>4</td>
<td>2/1</td>
<td>Serials, E-Resources and Accessibility. Guest Speaker: Stephanie Rosen, Accessibility Specialist, University of Michigan Library</td>
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<tr>
<td>5</td>
<td>2/8</td>
<td>Marketing, Liaison Activities &amp; User Needs. Guest Speaker: Scott Dennis, Librarian for Philosophy, General Reference and Core Electronic Resources, University of Michigan Library</td>
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<td><strong>NB: Class will be starting at 1:30pm to accommodate an SI Career Development Office event at The Henry Ford in Dearborn</strong></td>
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<tr>
<td>6</td>
<td>2/15</td>
<td>Weeding, Preservation and Shared Print Initiatives. Guest Speaker: Shannon Zachary, Head of Preservation and Conservation, University of Michigan Library</td>
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<td>7</td>
<td>2/22</td>
<td>Collection Assessment and Library Analytics</td>
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<td>8</td>
<td>3/1</td>
<td>Collection Development Policy Statements and Open Access.</td>
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<tr>
<td>9</td>
<td>3/8</td>
<td>Spring Break – No Class!</td>
</tr>
<tr>
<td>10</td>
<td>3/15</td>
<td>Budget Allocations and the Future of Academic Libraries. Guest Speaker: Joyce Hommel, Director of Learning Resources, Washtenaw Community College</td>
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<tr>
<td>11</td>
<td>3/22</td>
<td>School Libraries. Field trip to hear guest speakers Jennifer Colby and Lauren Warren, Huron High School, Ann Arbor Public Schools. 2727 Fuller Road</td>
</tr>
<tr>
<td>13</td>
<td>4/5</td>
<td>Global and Cooperative Collection Development. Guest Speaker: Loyd Mbabu, Librarian for African Studies and History, University of Michigan Library</td>
</tr>
<tr>
<td>14</td>
<td>4/12</td>
<td>Special Collections and In-class presentations of projects. Guest Speaker: Julie Herrada, Curator Joseph A. Labadie Collection, Special Collections Research Center</td>
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<tr>
<td>15</td>
<td>4/19</td>
<td>In-class presentations of projects and careers in collection development</td>
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**Weekly Reading List**

Please read assigned readings **before** we discuss them in class. For greater understanding, review readings after class. Links to the readings have been provided in the list below.

<table>
<thead>
<tr>
<th>Week</th>
<th>Date</th>
<th>Readings</th>
</tr>
</thead>
</table>
• Johnson. Chapter 4 (available [online](#)) |
• Kozlowski, Michael. (August 23, 2018). “Here is a breakdown of how much libraries pay for ebooks from publishers” *GoodEReader* [blog]. (Available [online](#)).
<table>
<thead>
<tr>
<th>Page</th>
<th>Date</th>
<th>Reading Notes</th>
</tr>
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</table>
|      |       |   - Johnson, Chapter 5 (Available online) NB: There is not an equivalent edition of this chapter in the 3rd edition, so please read this chapter in the 4th ed.
| 5    | 2/8   |   - Johnson, Chapter 7 (Available online). (3rd ed. – Chapter 6)

| 7 | 2/22 | • Johnson. Chapter 8. (Available online). (3rd ed – Chapter 7)

• Harker, Karen R., and Janette Klein. (2016). *Spec kit 352: Collection assessment September 2016*. Washington, DC: Association of Research Libraries. A recent survey of how libraries assess their collections. At the very least, read its executive summary, scan some of the survey's questions and responses, and get a sense of the range of supporting documents such as job descriptions, sample CD policies, and how libraries share assessment data and findings with constituents. (Available online).


| 8 | 3/1 | • Johnson. Chapter 3, bottom of page 82-top of page 97 (available online – pp 98-114 in online version). (3rd ed - Chapter 3, middle of page 98 to bottom of 112.)


• Lewis, David. (September 11, 2017). "The 2.5% Commitment". (Available online)

**For further reading:** Anderson, Joanne S., ed. (1996). *Guide for written collection policy statements*. 2nd ed. Chicago, Ill.: American Library Association. (Available online). NB: No need to read this guide cover to cover but consult it when working on the CD policy statements assignment.
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<tr>
<th>Date</th>
<th>Page</th>
<th>Notes</th>
</tr>
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<tbody>
<tr>
<td>3/8</td>
<td></td>
<td>Enjoy Spring Break!</td>
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</tbody>
</table>
| 3/15 | 10   | - Johnson. Chapter 3, pp 77-82 and middle of 97 to end of chapter (available online – pp 92-97 and 115-130 in online version). (3rd ed - Chapter 3, beginning to middle of page 98 and from bottom of 112 to end of chapter.)
| 3/22 | 11   | Whole books on collection development for schools are available. Keep these titles in mind if you are on the job as a school librarian:
|     |      | - Read the following from ALA:
|     |      |   - Code of Ethics
|     |      |   - Library Bill of Rights
|     |      |   - Freedom to Read Statement
|     |      |   - Freedom to View Statement
|     |      | - Familiarize yourself with the information and resources at the Freedom to Read Foundation.

13 4/5
- Johnson. Chapter 9. (available online). (3rd ed. – Chapter 8).
- Malpas, Constance. (2011). *Cloud-sourcing research collections*. Dublin, OH: OCLC. The report of a project to determine the feasibility of outsourcing the management of low-use books from academic libraries to third-party vendors. At the very least, read its 4-page executive summary. (Available online)

14 4/12 Special Collections and in-class presentations of projects

15 4/19 In-class presentations of projects and careers in collection development

Assignments

During the semester, you will be working in groups of 3-4 people on a series of assignments, revolving around a single institution of your group’s choosing, culminating in a final Collection Development Portfolio. Detailed instructions for each of the assignments will be made available via Canvas and discussed in class. Here are brief overviews:

1. **Institution Selection and Working Group Basics.** Identify the institution and the working group members

2. **Institution Details.** Provide detailed information about your institution.

3. **Annotated List of Review Sources.** Compile a selected annotated bibliography of three review sources appropriate for selecting materials for your model institution –OR- **Sample Reviews.** Choose three resources appropriate for your institution and write reviews.

4. **Materials Costs.** Research and cite the published literature for price forecasts for three material types typical to your model institution –OR- **Collection Profile.** Create a profile of the institution's collection or a selection subcollection that shows what materials are currently available in each subject area.

5. **Selection Guidelines.** Write guidelines for selecting individual titles that you and/or
selectors under your supervision at your model agency would follow when choosing new materials.

6. **Final Portfolio (written).** Revise assignments 1-5 above based on your instructor’s feedback. Assemble assignments into a final Collection Development Portfolio

7. **Final Portfolio (oral).** In-class oral presentation of your group’s Final Portfolio

8. **Self and Peer Evaluation.** Evaluation of the contributions made by you and your group members to the project, throughout the semester.

Please submit assignments *on paper* in class on the due date. Also submit a version of your report to Canvas. Failure to submit assignments on the due date and time will result in a deduction of 1% per day. If your working group cannot meet a deadline, contact the instructor *well in advance* of the deadline explaining your situation and asking for an extension. This is the same way you would approach such a situation in the real work world.

<table>
<thead>
<tr>
<th>Assignment Number</th>
<th>Assignment Title</th>
<th>Due Date</th>
<th>Points</th>
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<tbody>
<tr>
<td>1</td>
<td>Institution Selection and Working Group Basics</td>
<td>Jan. 18</td>
<td>2</td>
</tr>
<tr>
<td>2</td>
<td>Institution Details</td>
<td>Feb. 1</td>
<td>8</td>
</tr>
<tr>
<td>3</td>
<td>Annotated List of Review Sources OR Sample Reviews</td>
<td>Feb. 15</td>
<td>15</td>
</tr>
<tr>
<td>4</td>
<td>Materials Cost OR Collection Profile</td>
<td>Mar. 15</td>
<td>15</td>
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<tr>
<td>5</td>
<td>Collection Policy</td>
<td>Mar. 29</td>
<td>15</td>
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<tr>
<td>6</td>
<td>Final Portfolio (written)</td>
<td>Apr. 12</td>
<td>15</td>
</tr>
<tr>
<td>7</td>
<td>Final Portfolio (oral)</td>
<td>Apr. 12</td>
<td>10</td>
</tr>
<tr>
<td>8</td>
<td>Instructor, Self, and Peer Evaluation</td>
<td>Apr. 19</td>
<td>20</td>
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**Grading**

Your final grade for the course will be based on your grades on the collection portfolio assignments and your attendance and participation in class.

**Acknowledgements**

Thanks to Professor Sheila Intner (formerly Simmons, Catholic, and Rutgers) for recommending the Portfolio assignment. Her students have presented their final Collection Development Portfolios to their model agencies and received job interviews and offers there based on superior performance. Karen Markey reports her students have experienced the same.

Thanks also to Karen Markey for generously sharing her syllabus for the class. It formed the basis for the organization of the course for this semester.