



Collecting and selecting: A tale of training and mentorship

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Abstract

The shifting landscape of collections development and management, in conjunction with changing staffing models and priorities, has required an evolution of selection responsibilities at the University of Toronto. An administratively complex library system with over 40 libraries and three campuses serving over 88,000 students, significant portions of the University of Toronto Libraries collections were historically built by selectors in the centralized Collection Development Department. Over the past decade, the model has evolved from a single individual selecting for all physical and applied sciences to many selectors, and of engineering and computer science disciplines have finally moved to a fully dispersed model where liaisons in the Engineering & Computer Science Library (ECSL) select for their liaison areas. Historically at the larger U of T Libraries, selection and liaison duties have been separate roles, ostensibly to let selectors and liaisons focus on developing the expertise and experience for their specific role. Over time, staffing levels at ECSL and librarian interest have necessitated a shift to a more distributed model for selection. In this paper, the authors will discuss how selection training has evolved over the years to become a robust program that includes ongoing mentorship and support, a new system-wide Collections Community of Practice initiative, and growing selector empowerment and capacity building in e-resource management and assessment through the resource lifecycle. As none of the current ECSL selectors were hired into their positions with selection duties but have had those duties added as the staffing model and requirements of the ECSL has changed, training and mentorship has become an important step in creating and maintaining the high-quality collections on which the University of Toronto prides itself. The paper will also look at the experience of the ECSL librarians taking on selection for their liaison areas and the benefits and challenges of adding on the extra work and responsibility. The drawbacks and rewards of dispersing selection more generally will be discussed, as well as the mentorship and feedback in terms of collections philosophies as more experienced selectors train and mentor their colleagues new to this role.

Introduction

The University of Toronto Library (UTL) system is an administratively complex environment containing over 40 libraries. At UTL, collection development has evolved over time, from a faculty lead selection model to a centralized system with dedicated liaison and selection work mostly divided by areas of responsibility to the current distributed collection development and management approach. This paper will describe the evolution of engineering and science selection and training at UTL with a focus on the workflow and training of the librarians at the Engineering & Computer Science Library (ECSL).

Literature review

The literature on the topic of collection development or selection workflows and training covers topics such as describing methods that rely more on faculty than librarians for collection development, training that runs the gambit from in-depth to informal, and reviews that show the evolution of selection and collection development processes over time.

Jensen [1] describes how the University of Alaska Fairbanks, as a result of budget cuts, retirement and attrition, moved from liaison collectors to a patron-driven model where faculty are allotted a budget to purchase materials. This article questions the hard data suggesting that liaisons are better able to build a collection than other models. While a faculty driven model is far removed from the current method used at UTL, where increasing numbers of liaisons are taking on selection duties, it is interesting to note the direct involvement by faculty was how selection occurred at the University of Toronto (U of T) prior to the 1960s when the Acquisitions Department was established. In another example of an effort to lighten the load of selectors, Mehra and Elder [2] describe how a collections development department coordinated with a master's level information literacy program to help distribute selection duties. Students in the program did an assignment where they ran an analysis of a collection that included an exploration into user needs and a collection evaluation. This gave students hands-on experience with collection development and learning from experienced guest lecturers while also lightening the load for an over-worked collections development department.

While many articles on the topic of selection training [3], [4], [5], [6], [7], [8] espouse and promulgate the benefits of mentorship for both the mentee and the mentor, Shabb [4] also describes the lack of formal training for selectors working at UC Irvine. As the panel session [4] occurred at an ALA Annual Conference in 1996, it may not reflect current practices. Casserly and Hegg [9] conducted a survey of librarians and determined that one third of librarians who responded worked at libraries that did not provide selection training while around half of the respondents did have formal selection training at their institutions. This formal training included professional workshops, orientation and policy reviews, and manuals and mentoring. It is worth noting that it was not until a few years ago that UTL started developing and implementing an in-depth training process for new engineering and science selectors outside the library system's collection development department. Even now, while engineering and science selection training at the downtown campus ("St. George Campus") is becoming more standardized, training for other subject areas and the other campuses is not standardized across the UTL system.

ALA's Guide for Training Collection Development Librarians [10] outlines several key assumptions about collection development including the fact that many selectors will end up having to collect in subject areas in which they have little to no subject expertise or background. Wray [3] offers some practical tips to help people overcome a 'crisis of confidence' or imposter phenomenon. The ALA panel described in [4] includes a description of how mentors at the Phoenix Public Library take a year to monitor new selectors followed by deeper training.

Another key assumption outlined in [10] is that training is required at both a macro and micro level. The macro level includes subject expertise, the publishing landscape and knowledge about disciplinary patterns and habits. Many articles described their in-depth training methods for new selectors [11], [12], [13]. One paper describes an intensive six-month collection development training program that University of Tennessee at Knoxville undertook for new selectors that was videotaped for future generations as training. The training included topics such as selection, approval plans, statistics and evaluations. However, due to the amount of time required to undertake the training, it was not offered again [12].

Training at the micro level, on the other hand, focuses on information specific to organizational policies, procedures and culture. The literature describes the benefits of providing a detailed overview of the institution's collection development landscape as part of the training process, including training described by Yankee Book Peddler that includes a big picture focus and a training matrix - a visible roadmap for the training [4] and the creation of a First Day Kit at the University of California Santa Barbara to give an overview to new selectors of policies, practices and relevant data needed for their roles [11].

In an analysis of job postings, the most frequently mentioned competencies related to selection included “acquisitions work”, “communication skills”, and “automated library systems”, suggesting that having interpersonal as well as technical skills are equally important to selection work [14]. Tucker and Torrence’s literature review [15] notes that LIS education does not and, by virtue of the complexities, cannot teach a new graduate everything they need to know about collection development. The authors describe some of the challenges of librarians new to selection, including challenges such as the exponential growth of published material, including the explosion of digital resources, and navigating the building of relationships.

The University of Toronto context

At U of T, collection development, specifically selection, is done in a hybrid model. While there is a “central library system” consisting of 17 libraries on the St. George Campus, there are also many other libraries that are outside of the central system. The libraries outside of the central library system include departmental and college libraries, as well as libraries at the Scarborough (UTSC) and Mississauga (UTM) Campuses. This semi-centralized structure of the UTL system mimics the complicated nature of U of T itself.

Within the central library system, which includes the ECSL, much of the arts, humanities and social sciences selection is done centrally within the Collection Development Department (CDD) located in the main social sciences and humanities library, the John P. Robarts Research Library (Robarts Library). Historically, the selectors for the life sciences, health sciences and applied sciences and engineering were also based in Robarts Library, but over the past decade the duties have become more and more decentralized. Currently, virtually all selection for engineering and sciences for the central library system is done by liaison librarians outside of the CDD. In fact, some of the selection for central libraries is done by liaison librarians who work outside of the central library system (e.g. in departmental libraries) and who have subject specialization in specific areas.

Historically, faculty members have had a dominant role in academic library materials selection, as they were felt to have the research, teaching and disciplinary expertise necessary to make the best selection decisions. Beginning in the 1950s and 1960s, responsibility for selecting library materials at university libraries began to shift from faculty to library staff [16], [17] and this trend was evident at U of T.

The 1960s saw great expansion of graduate programs at U of T. The central CDD department, named the Book Selection Department until 1991, was created, and librarian selectors working out of that department were given responsibility for selection of materials across the central

system. In the years 1966/67, approval plans, known at U of T as Dealer Selection Orders or DSOs, were first established and grew quickly to become the UTL's main source of currently published print monographic works. From July 1966 to June 1967, the number of active DSOs rose from one to 34 [18]. The 51 DSOs which the library system maintains in 2020 remain some of the primary vehicles for sourcing monographic materials from around the world. This system has allowed the library to continue to meet faculty needs by purchasing comprehensively across disciplines, and faculty and students can still make individual requests where needed. The DSOs are managed by selector librarians with language, subject or area studies expertise, working out of the collection development department. Fig. 1 shows a timeline of the changes in the selection process over time.

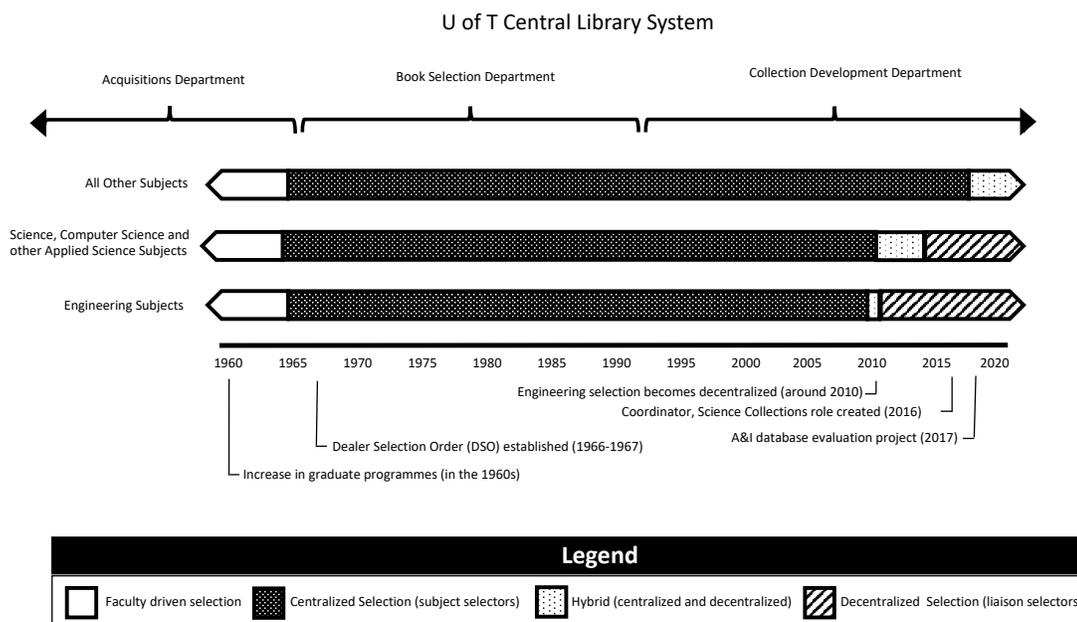


Figure 1. Timeline of changes in the selection process in the central library system for the time period 1960–2020.

For several decades the central system science collections were built by two selectors, one for life sciences and the other for physical & applied sciences. This mirrors the practice noted by Magrill and East [19] of the appointment of specialists in traditional subject areas who spent part or all their time on collection development in the 1960s. The selectors communicated regularly with reference librarians, as well as with librarians running small departmental libraries, to ensure that the collections reflected patron needs. Beginning around 2010, selection in the sciences at the St. George campus began to be distributed among liaison subject specialists. There are now 12 science, technology, engineering, and mathematics (STEM) selectors in the central library system, three of those in engineering. Fig. 2 gives an overview of the complexity of the U of T library system and how selection happens.

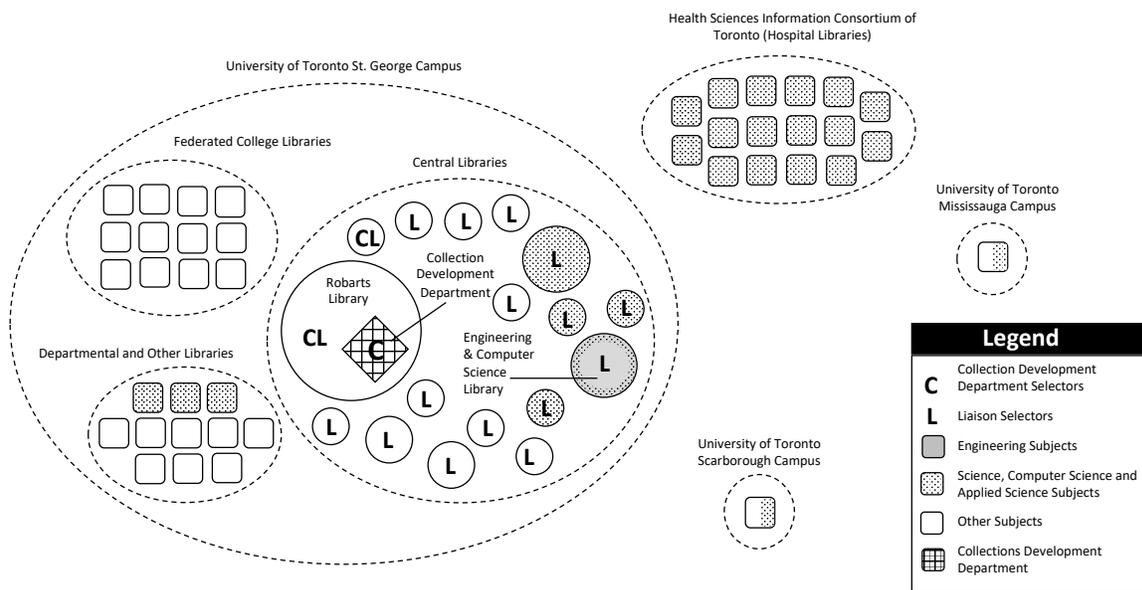


Figure 2. The libraries at U of T and the distribution of selection duties in the central libraries

A historical look at selection training

Until less than a decade ago, training of new STEM selectors focused far more heavily on monograph selection than it does today. The content covered for training included understanding and applying general selection principles to monographic selection (e.g., research level, single copy, every discipline except agriculture and veterinary science (i.e. programs not offered at U of T), everything ‘notable’), respecting main exclusions (e.g., textbooks, popularizations, translations into non-English) and making decisions on gift items. Training focused on functions such as single book firm ordering and ensuring any gaps in approval plan coverage were filled as well as more complex procedures involving the creation and monitoring of standing orders for monographic and technical report series. Training in firm ordering and monitoring of serials subscriptions for specialized collections such as hardcopy standards, codes, regularly or irregularly published core handbooks, and reference works was also important, and understanding their publication patterns was key to the job. Selectors were also trained in dealing with single title journal requests from faculty and working with Serials and Order Department staff to resolve problems with serial subscription interruptions or changes.

Training today

For new engineering and science selectors, training has become more systematic over the past decade, with continual refinements. While training was not superficial or cursory in the past, it was inconsistent and providing more standardized training has been a focus in recent years. In 2014, selection began to be distributed to more liaison librarians, with an increase in science and engineering selectors from three to seven. Training mostly focused on selecting using the DSO system used at the time, with some information on the collection lifecycle and selecting serials

and resources. The new selectors also began attending selection meetings, which included all selectors from the central library system. Training continued to be inconsistent in 2016 when the new role of Coordinator, Science Collections was created, and a new selector took over collection development for engineering. When questions or issues arose, they were addressed but training was minimal and relied on the previous experience of the selector during this transition period.

With the creation of the Coordinator, Science Collections in 2016, training new engineering and science selectors was placed under this portfolio. The Coordinator has spent the last four years developing and implementing a step-by-step approach to training, which includes traditional instructions on the purchase of monographs but also includes in-depth information about the collection development process as a whole and training for participating in e-resource license renewals and purchases.

The steady transition to electronic collections and preponderance of packaged e-resources has driven the expansion of selection training, expertise building, and greater selector empowerment. Developing a culture of assessment through the e-resource lifecycle, and a shift in thinking from selection to collections management and curation, has been a priority. Core selector training and mentorship in e-resources includes processes and considerations for requesting new e-resources; building understanding of renewal cycles and license peculiarities for particular resources; greater awareness of the various e-book platforms; considerations for single e-book firm orders; participation in larger joint e-resource assessment projects such as a large abstracts and indexes (A&I) review and e-journal package core/non-core swap exercises; consortial packages; and navigating an issue-tracking workflow queue for new serial title requests.

The step-by-step training plan is modular and flexible to accommodate librarians' busy schedules and prior knowledge. For the latest group of trainees, a chart with the details of modules to be covered in the training has been created so everyone can keep track of what they have learned so far and what is left to cover [see Appendix]. The training is done in person, and it is not always possible for all three of the newest selectors to be present at every training session, so this chart gives everyone a sense of their progress. At the time of this writing, the newest cohort of engineering selectors are currently half-way through this more structured training. It is important to note that due to the winter holidays, conferences, and the like, this in-depth training has been delayed and sporadic. A downside to the enriched training is that it takes longer, increasing the likelihood that life and other responsibilities will get in the way. It is a tradeoff - if you need someone to start selecting immediately, practically speaking, this model of training may not work for your library.

While training new engineering selectors remains the role of the Coordinator, some of the mentorship has been taken on by other engineering librarians who are either already doing selection or have done selection in the past. This is mainly due to proximity – the engineering selectors are in the ECSL, steps away from each other's offices, and the Coordinator is in the CDD in Robarts Library. The Coordinator has also established regular drop in “office hours” so that the new engineering and science selectors can regularly meet to share any questions that

have come up. Engineering and science selectors have also used a peer support framework, often asking each other questions or troubleshooting problems together when issues arise.

Selector empowerment, capacity and relationship building

Due to budgetary constraints, there have been several major collections assessment projects over the last few years. For example, in 2017, a major project got underway, involving 30 librarians, who were a mix of selectors and reference librarians from across U of T's three campuses. They evaluated all 151 A&I databases subscribed at UTL. The project goal was to identify duplication, low use discovery tools, and consider alternate methods of finding content. In the end, the librarians determined that 40 databases contained little to no relevant or unique content and had little to no usage so their subscriptions could be discontinued. Aside from the financial implications of this project, it has served as a model for other assessment projects and has contributed to the empowerment and capacity building for many librarians in the assessment of e-resources throughout the e-resource lifecycle. Since assessment projects of this scale had either not been undertaken in the past or had been conducted by a smaller group mostly from the CDD, other librarians did not have the opportunity to build collections related assessment skills. The A&I assessment project has now become a model for other assessment projects and has been used in the training of the new engineering selectors as well.

With the domination of e-resources and the need to ensure decision making input from colleagues across UTL and throughout the e-resource lifecycle, a new tri-campus Collections Committee was recently formed. The committee serves as a forum for broad input and collaboration from colleagues across the campuses, federated colleges, central, and departmental libraries; a forum for discussion of collections issues; priority and joint goal setting; and overall coordination of collections projects. A larger initiative in the committee is charting an initial path for collaborative work in the areas of collections management, assessment, development, and preservation. For example, in the area of collections assessment, selectors working hand in hand with colleagues from such areas as ordering, e-resource management, scholarly communication and assessment, have been identifying challenges and possible solutions in structured assessment projects, what or who is missing in decision making, and fostering a creative space for sharing project outcomes, good or bad. The committee's "Community of Practice" (COP) is an initiative to encourage sharing best practices, asking questions and providing mutual support. Some initiatives so far have included creation of a checklist of information needed when exploring an e-resource and sharing of procedures for non-central libraries ordering e-books in the Global Online Bibliographic Information³ (GOBI³) interface. An overarching goal of the COP is to encourage involvement from across the three campuses in the collection development and management cycle.

Liaisons fitting it all in

At U of T, part of the impetus for decentralizing selection has come from retirements and other job changes. Nevertheless, another significant factor was the awareness that distributed, liaison led selection was a successful model at many other institutions. Some of the complexities of distributed selection include:

- Deeper subject, curricular and research knowledge guiding collection building and management
- Potential for more direct connections between user need and collection building and management
- Selection functions are largely important but not urgent; thus, sometimes left on the back burner
- Selection functions require functional expertise, creating potential hurdles in keeping up with process details when selection is one of many, many responsibilities
- Larger numbers of selectors scattered across the system result in added complexity and issue tracking challenges for Order Department staff

Conclusion

Collection is a complicated and ever-changing role for librarians. In a system as large and complex as UTL, it is not surprising that over the last 60 years the methods for selecting and for training selectors have evolved. At the same time, the day to day responsibilities of liaisons have also changed and finding a balance with expanding roles can be difficult. To this end, engineering and science selection at UTL is still a work in progress but with declining budgets and the changing scholarly landscape, creating better support networks and more structured training and mentoring will help current and future selectors develop these new skills in a more systematic way than was possible in the past.

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Appendix

Training chart showing the “units” that need to be covered and each trainees progress.

Topic	Notes	Done?		
		AH	JR	TZ
<p>Selection basics</p> <ul style="list-style-type: none"> · Main sources of information for/about selection · UTL selectors · General selection principles · Selector division of responsibility · Relationship to non-central selectors · Stack Locations According to LC Classification · How do selectors find out about new publications · e-resource package lists · E-resource lifecycle · The Dealer Selection Order System (aka DSO system, aka Approval System) · Basic principles underlying acquisition of current books by the DSO system · Subject funds 		All done	Done: e-resource lifecycle up to ‘marketing’; need to do other basics still	All done except e-resource lifecycle ‘marketing’ & onwards
<p>Electronic resources</p> <ul style="list-style-type: none"> · requesting new electronic resources overview, considerations · POs in ELECTR (main electronic) subject fund 	Cris; additional detail from meetings with Weijing, Eva	done	done	done

<p>Ebooks</p> <ul style="list-style-type: none"> · ebook platforms · ebook purchase guidelines · ebook workflows 	Cris	done	done	done
<p>E-Resource Assessment</p> <ul style="list-style-type: none"> · Databases example project: A&I review · Ebooks example project: LWW Ovid 	Cris	All done	Have read through the examples in Confluence	done
<p>Serials</p> <ul style="list-style-type: none"> · overview, consortial, packages, individual · JIRA queue for new serial title requests 	Cris; tbd			

<p>Additional information on DSOs and Purchase Orders (POs)</p> <ul style="list-style-type: none"> · · Background information on the history of the DSO plans (see the second item): https://onesearch.library.utoronto.ca/cdd/about · DSO master list, with selector in charge: DSO Master List.xlsx · DSO receipts, 1999 +: DSO Receipts, 1999 + · Current Gift and Trust Funds: Gift and Trust Master List with Selectors, 2018-19.xls · Current subject and e-funds with selectors: Current Subject Funds Master with Selectors, 2018-19.xls · Three types of purchase orders: https://connect.library.utoronto.ca/download/attachments/39649516/3%20Types%20of%20Purchase%20Orders%20Sep%202018.docx?version=1&modificationDate=1537545471000&api=v2 · On which system should I order?: https://connect.library.utoronto.ca/download/attachments/39649516/Which%20system%20Sep%202018.docx?version=1&modificationDate=1537545623000&api=v2 · Sample Sirsi purchase order: https://connect.library.utoronto.ca/download/attachments/39649516/SAMPLE%20SIRSI%20PURCHASE%20ORDER.docx?version=1&modificationDate=1474988410000&api=v2 · The lifecycle of a purchase order: https://connect.library.utoronto.ca/download/attachments/39649516/Lifecycle%20of%20a%20Purchase%20order.docx?version=1&modificationDate=1474988459000&api=v2 	Cris	Good but happy to go over this again	Have read through the linked material	done
<p>Ordering on GOBI</p> <ul style="list-style-type: none"> · mechanics of ordering · decision process <p>how order process works</p>	Alexa Evans, Cris	Good, but happy for more guidance	done	done

Ordering on SIRSI · when to use · mechanics of ordering	Alexa Evans, Cris	done		
Patron request emails, how to handle them; also DSOs for which he is responsible	Graham Bradshaw	done	done	done
Gifts in kind	tbd	done	done	done
YBP, order returns	Dan D'Agostino	done	done	done