CCDO Collection Report Template

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University/Institution Duke University

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Collections Report

Budget Update
In fiscal year 2024 the collections budget stabilized after three consecutive years of significant reductions. A modest increase provided relief for high inflation on subscription renewals and other continuing commitments, though book prices and shipping costs also continued to rise, thus continuing to reduce buying power.

We continued to identify additional expenses paid from university allocations that could be shifted onto endowment income, though large shifts had already occurred during the previous year as part of triangulation project. We made further adjustments to our book approval plans, which had been reviewed in FY2023, again reducing the number and cost of books automatically purchased outside of title-by-title selection by librarians. We also engaged in small scale efforts to identify and cancel lower value subscriptions, following on the heels of larger projects like the comprehensive database review of FY2023. This allowed us to meet some of the intense demand from faculty and other users for new journals and other subscription resources with a robust round of newly added titles. As in fiscal years 2022 and 2023, this year we did significant one-time spending to buy out future annual access fees for online content, giving us greater flexibility in years to come.

Staffing and Organizational Changes/Update
Staff with collections related roles + responsibilities newly appointed in FY24:
- Adhitya Dhanapal, Resident Librarian for South and Southeast Asian Studies
- Zhaneille Green, E-Access Librarian
- Tracy Jackson, Russell-Flowers Processing Archivist
- Ani Karagianis, Centennial Archivist (term)
- Zhou Pan, Resident Librarian for Resource Description
- Xiaoyan Song, E-Resources Acquisitions & Licensing Librarian
- Brittany Wofford, Head, Natural Sciences & Engineering
- Michelle Wolfson, Research Services Librarian for University Archives (term)
New Programs or Initiatives

Where Curiosity Leads, DUL Strategic Plan 2024-2029 Launched
DUL staff engaged in a library-wide effort to develop its new strategic plan which was soft launched in January. This work included an update to DUL’s mission, vision, and values as well as outlined five strategic pillars with underpinning goals and tactics that will be pursued over the next five years. The collections pillar is succinctly focused on alignment with university priorities, sustainability, and access.

Alma implementation
In September, Duke began a nine-month project to implement the Ex Libris Alma platform and will go-live next month. Staff across Duke Libraries have worked hard to prepare, document, test, and iterate data loading, configurations, and integrations for the migration from Aleph to Alma. In addition, the Duke Kunshan Library in China will also implement Alma in summer 2024.

Conservation Documentation Archive
In September we launched the Conservation Documentation Archive, a collection of conservation documentation produced by DUL’s Conservation Services Department from 1997 to the present day. The archive contains photographic documentation and written reports that describe the condition of an item prior to treatment and record the conservation treatment procedures carried out. Collection materials are primarily from Duke University Libraries' Rubenstein Rare Book and Manuscript Library. The Conservation Services Department plans to actively add documentation to the archive on an annual basis.

Local, National, International Partnerships
In April, Duke hosted a hands-on workshop on Islamic and Persian bookbinding history and methods led by a Library of Congress conservator which funded by a TRLN IDEA grant.

Artificial intelligence tools, services, reskilling
- Duke Libraries held a Metadata Forum last fall which was focused on Metadata and AI. Presenters provided an overview of AI in Academia and Academic Libraries; Experiential learning with AI in Library and Information Science Education or the lack thereof; Tools and use cases for AI and Metadata Management.
- Duke AI Summit (co-organized by University Librarian Joe Salem) was held last spring to provide an opportunity for the Duke community to learn more about the wide range of research, teaching, and operations activities that are engaging AI across Duke. It also provided a chance to give input into the direction of AI at Duke and the resources and support needed to further accelerate it.
Collection Assessment Activities
Several collections groups were charged over the last year to focus on specific subject and/or format categories in need of alignment and updated strategy policy. The following groups were convened:

Video Collections Strategy Group - The Video Collections Strategy Group (VCSG) articulated a cohesive strategy for addressing current and future patron needs for video media (physical and digital). The group documented and assessed current practices in curation & acquisition, instruction needs, and usage of the collection at the individual patron level. Guided by DUL collections strategy -including subject area prioritization determined by Collections Council- the VCSG developed a report of recommended policies and practices for video collections moving forward. The report particularly addressed realistic assessment of the importance and viability of formats, a clear articulation of collection goals, and a plan for ongoing assessment of the collection.

Collection Space Management Group - In light of growing space constraints in Duke’s Library Service Center, a Collection Space Management Task Group was charged to establish and formalize a more programmatic approach to the collection space management lifecycle. Over the last year, members of the task group have identified critical collections space issues; began normalizing data gathering and reporting out on pertinent space challenges to inform collection management decision-making; planned and prioritized near-term projects in support of collections space reclamation; documented formal policies and practices concerning item transfers (relocation) + deaccessions (withdrawal) processes; provided progress reports and milestone updates. Two significant outcomes of Duke’s space challenges were a pause on accepting gifts of books or other materials for the general collection and ramp up of a years in the making resizing project for the disposition of materials.

Government Documents Collections Resizing – a project for much-needed inventory and weeding of physical materials on the shelves. Last summer work began to escalate the project and move forward with a large-scale clear out of materials identified for weeding. This effort resulted in over 51k items physically withdrawn as of spring 2024. This equals roughly 400 standard 3-foot shelves [based on sampling of number of items on shelves] which has supported shifting collections and reducing shelving density in prolific call number ranges.

Lilly Library Closed for Renovation
The Lilly Renovation Collections Working Group concluded its pre-renovation enabling work which involved identifying and prioritizing actions which supported preparation of the Lilly Library collection. This included collection management, retention and withdrawal, for current and incoming monographic, serials, audio/visual materials in open and locked stacks as well as paintings, sculpture, and other historical objects. Over 78,000 items have been relocated to an offsite storage facility while thousands of other items were transferred to the Perkins Library and the Library Service Center to support ongoing access.

The Collections Budget Strategy Group also developed an interim collection development strategy for Lilly during what is expected to be a multi-year closure. The interim period will be guided by
principles which prioritize space management and access over ownership. Strategies will include e-focused collection development; conversion of print periodical subscriptions to electronic format when available; changes and pauses to approval profiles.

“Top of Mind” (Challenges, Issues, etc. to surface)

- Restrictive AI licensing terms for electronic resources
- Funding for a new high-density storage module(s)
- Methodology for assessing collections diversity
- Sustainable and informed campus-wide data acquisition
- Discovery strategy and its care and feeding