

Breaking the Mould: How Re-examining the Allocation Formula Led to the Creation of a Dynamic Role for the University's Librarians

Terrence Paris
Collections Development Librarian
Mount Saint Vincent University

Abstract

A modestly conceived proposal to change a long established allocation formula rapidly evolved into a new model of library service. The new model created five discipline fund groups: Humanities, Social Sciences, Sciences, Educational Studies and Business Studies and the assignment of liaison tasks to the five professional librarians and the archivist. The goal of creating a fairer allocation was superseded by more substantive goals intended to: loosen the ties of collections funding to 24 departments by funding groups of cognate disciplines and unique programs of interdisciplinary instruction and research; involve all librarians in the task of collection analysis and development; and redefine librarian positions to promote their contribution as full partners with classroom faculty in solving problems and improving research and teaching. Along with improved collections, the ultimate goal was a full integration of the librarians' professional expertise with the University's newly drafted strategic plan.

Keywords: Academic libraries, collection development, liaison librarians, faculty-librarian relations, interdisciplinary studies

Who We Are

In 1925 Mount Saint Vincent, founded by the Sisters of Charity as an academy for young women, became the first degree-granting independent women's college in the British Commonwealth. Although ownership has been transferred to a lay Board of Governors and male students have attended since 1967, the University mission continues to be inspired by a strong tradition of social responsibility and an enduring commitment to the advancement of women. ([Destination 2012: The Strategic Plan of Mount Saint Vincent University](#)).

In 2007 Mount Saint Vincent University (MSVU) in Halifax, Nova Scotia had 4,309 students, 2,259 full-time and 2,050 part-time, registered in a wide range of arts, sciences, and professional studies programs. Of that total enrolment, 2,207 were full-time undergraduates and 907 were part-time undergraduates; 52 were full-time graduate students and 1,143 were part-time graduate students ("Association of Atlantic Universities > Home."). The majority of the 1,195

graduate students were working teachers enrolled part-time in the Masters of Education program. In the fall term of 2006, the most popular programs and majors, in excess of 50 registered students, were Business, Child and Youth Study, Public Relations, English, History, Applied Human Nutrition, Psychology, Biology, Information Technology, and Tourism and Hospitality Management (Enrolment Update: December 2006).

The Library is a charter member of Novanet, a consortium of academic libraries in Nova Scotia, founded in 1988, whose mission is to cooperate to enhance access to information and knowledge for the benefit of their user community of 44,000 full-time equivalent post-secondary students. In addition to MSVU, the member institutions are Dalhousie University, Saint Mary's University, the Nova Scotia Community College, Saint Francis Xavier University, the University of Cape Breton, the University of King's College, the Nova Scotia Agricultural College, the Nova Scotia College of Art and Design, and the Atlantic School of Theology. Novanet members share a common catalogue with patron-initiated document delivery.

In addition to the University Librarian, the Library has five professional librarians with the formal titles of Coordinator of Public Services, Collections Librarian, Bibliographic Services Librarian, Extended Services Librarian, and Systems Librarian, and a part-time librarian who serves as the University Archivist. All librarians and the archivist are assigned shifts at the reference desk, and five of the six participate in classroom instruction sessions. As of fall 2006, all librarians work as liaisons with departments clustered into five disciplinary groups: Educational Studies, Business Studies, Humanities, Sciences, and Social Sciences.

The Impact of Interdisciplinary Studies

Multidisciplinarity is defined as "a juxtaposition of various disciplines, sometimes with no apparent connection between them." Interdisciplinarity is defined as "the interaction between two or more disciplines" and may be manifested in a range of interactions from "the simple communication of ideas to the mutual integration of organizing concepts, methodologies, procedures, epistemology, terminology, data ..." (Salter and Hearn 186). Although the ideas of integration and synthesis of knowledge had roots in ancient Greece, the word "interdisciplinary" was first used in 1937 to describe the idea of integrated curricula as part of the education reform movement in the United States which originated in the second decade of the twentieth century (Klein, "Interdisciplinary" 136).

Multidisciplinary and interdisciplinary modes of inquiry coexist at the University: a core of liberal arts and sciences courses within traditional departments along with the interdisciplinarity clearly evident in the names of several programs and departments in the Arts & Sciences Faculty: Women's Studies; Canadian

Studies; Cultural Studies; Linguistics; Public Policy Studies; Peace and Conflict Studies; and in the Professional Studies Faculty: Communications; Public Relations; Family Studies & Gerontology; Child and Youth Study; Applied Human Nutrition; Information Technology; Tourism & Hospitality, and in the frequent cross listing of courses among departments in the University calendar.

In fall 2003 the Collections Librarian reviewed the literature on library support for interdisciplinary studies and drafted a report on the many ways that the Library might provide services of value (Paris, [Library Support](#)). Since then the University's commitment to interdisciplinary knowledge has been affirmed in the strategic plan of the Research Office which characterizes the context at MSVU as one based on the assumption that the research undertaken by faculty and students is grounded in interdisciplinarity. The recently completed Strategic Plan for the University as a whole reiterates the commitment to promote interdisciplinary research on gender and social justice issues as a strategy to achieve the goal of women's advancement ([Destination 2012: The Strategic Plan of Mount Saint Vincent University](#)).

How Our Collections Grew

For nearly four decades, the collection development budget has been based on an allocation formula that apportions the budget among 24 departments and programs. There is no surviving documentation which explains the choice of the components or the method of calculation adopted to determine the annual allocation. The formula consists of five equally weighted components of demand and supply for which data was collected. The enrolment totals, the number of courses listed in the calendar, and the books circulated during 12 months within Library of Congress classification ranges identified as relevant to each department, are intended to acknowledge demand on the Library collection. Internal average book costs for the previous fiscal year and total print periodical expenditure by department for the previous fiscal year are chosen to reflect the cost of supply to the Library. The components are described in detail in the "[Policy for Acquisitions Allocations](#)".

Once the data are collected, the formula is applied. For example: In 2007-2008 academic year the total student enrolment in all half- and full- credit courses is 13,007. The total is divided by 24 to provide an average of 541.96 as a factor for the enrolment component. For the History allocation the "standardized enrolment" is 704 divided by 541.96 = 1.30. The same calculation is performed for each department to create five standardized components for 24 departments. The other standards for History are courses 1.06; book costs .80; loans 2.87; print periodical costs 1.28 with the average of the five 1.462. In 2007-2008 the total amount reserved for allocating to 24 departments is \$105,190 and the average allocation was \$4,383. The average allocation was multiplied by the department's

component average to determine the department's allocation.¹

Although some funds had been used by librarians for the selection of reference and general materials, the Library relied largely on classroom faculty to select books and serials appropriate for the curricular and research needs of the institution. Every department at the University chose one library coordinator from among its members to receive and approve selections and forward the orders to the Library for processing. In general, the faculty supported the process and welcomed the opportunity to make a significant contribution to the growth of the Library. The Orders Assistant in the acquisitions department received and processed the orders without any scrutiny on the part of the professional librarians.

While the participation of faculty in the selection of library materials and the use of a formula for the allocation of library funds among departments are common features of small universities with small professional staffs (Budd and Adams 381-390), the deficiencies have been enumerated internally (Paris, Proposal), and reviewed in the literature (Werking 140-144).

In 2006 the Library introduced a new approach to collection development which would retain both the original allocations formula and the library coordinators appointed by each department from among its members, but would reconfigure the allocation of funds and embed each librarian within the process with duties as a liaison assigned to one of five groups of cognate departments and programs.

Why a Change Was Needed

Budget Management

The formula allocation model proved deficient as a budget management tool, remained a perennial target of complaints, and seemed impossible to revise to everyone's satisfaction. Some faculty observed that components of the formula which the Library used to determine the annual allocation were unfair.

The departmental allocation totals from one year to the next fluctuated dramatically when revised data was entered. A disconnect between the amount allocated each year to departments and the actual selection activity of departments resulted in an under expenditure by most and significant over-expenditure by some.

The budget needed to support a demand for increasing access to a wider range of multidisciplinary databases. Multidisciplinary electronic resources, particularly those electronic journal collections where content often duplicated current print subscriptions, were having an increasing impact on the Library's ability to sustain and justify past procedures employed to support a print collection (Jaguszewski

and Probst 799-820). The Library adopted a policy to cancel print journal titles if the article access was available from the publisher's site (e.g. Springer or Taylor & Francis) while maintaining a print subscription if the Library depended on an aggregator (e.g. Ebsco) for online access. Rather than attempt to apportion funds to support electronic resources among 24 departments, 34% of the total Library acquisitions budget was set aside to maintain both aggregated databases (e.g. Academic Search Premier) and subject specific databases. Access to resources negotiated under the national site licensing initiative of the Canadian Research Knowledge Network (CRKN) on behalf of Canadian universities was funded from a separate line of the Library's operating budget from our initial participation in 2000 until 2007 when the CRKN fund was fully integrated into the acquisitions budget.

Collection Quality

The Library relied upon other collections, particularly those of our Novanet partners, to support the basic needs of our students. The varying levels of selection activity and interest in the Library's monograph collection among individual faculty members tended to result in an under selection of materials required to support core courses in some disciplines. Student comments appended to the LibQUAL+ Survey cited the larger and newer collections at Dalhousie and Saint Mary's Universities, and referred specifically to inadequate monograph collections to support undergraduate courses in mathematics and physics, out of date materials in the field of early childhood education, and the small number of journal subscriptions to support unique programs in applied human nutrition and tourism and hospitality.

The concept of scatter had to be addressed. "Scatter is a measure of the number and structure of the resources in an academic discipline" (Westbrook 193). In a low-scatter field, associated with a traditional academic discipline, resources are not widely dispersed. Interdisciplinary fields are identified as high-scatter: a wide array of resources is needed to gather relevant information. Scatter even manifested itself in the departmental affiliation of faculty members who were assigned to coordinate the interdisciplinary programs based on their research strengths and interests. For example, Cultural Studies began life under Fine Arts and moved to the Religious Studies Department, and Peace & Conflict Studies moved from the Education Department to the Applied Human Nutrition Department. Although each long established department was allocated library funds, the newer interdisciplinary program coordinated by a member of the department did not receive an allocation.

The Role of the Librarians

The Library Committee, a standing committee of Senate, is mandated to advise the University Librarian and Senate on priorities and policies regarding library resources and services at the university. The University Librarian is an ex-officio

member of the Committee with nine elected members: one librarian, six members of faculty (three representing Arts & Sciences and three representing Professional Studies), and two students.

The Vice President (Academic) in a memo to the Chair of the Senate Library Committee, intended for submission to the first External Review of the Library In 1991, stated that "the credit for these increases [in the acquisitions budget] belongs not to the library staff, but to the faculty led by you, the Senate Library Committee and the Administration, who made library funding a priority" (Ingalls).

The Library had positioned itself as a seeker of help from classroom faculty. Librarians approached faculty for assistance in budgetary matters, materials selection, and collection management. A long history of modest involvement in the process and self perceived lack of competency in this area seemed to contribute to disinterest among the librarians in the task of collection analysis and development.

While the librarians were comfortable with the terminology used to describe their positions, some classroom faculty were unsure of the identity of the librarian ultimately responsible for delivering a service, and the respective functions of the professional librarian and the library technicians within each service unit.

The passivity underlying many of the above-mentioned concerns runs counter to commentaries on the "postmodern" library which advises librarians to become proactive and provide solutions for others if the library is to remain vital and relevant to the academic enterprise (Elteto and Frank 495-501). Allen Veaner in his 1985 report to the Association of College and Research Libraries recommended that ACRL "reaffirm the academic librarian's key role as "proactive analyst, subject expert, counselor, consultant, linker, and intermediary in the cycle of scholarly endeavor and scholarly communication" (Kotter 294). Over two decades later the urgency is greater. The disappearance of the university library as place and the ubiquitous presence of the Internet as the research library of choice in offices, residences, home and coffee shops has nurtured "ambiguities and uncertainties" (Elteto and Frank 500).

The challenge was three fold. The Library had to address the specific issue of deficiencies of the formula allocation procedure as an outdated budget management tool; conceived first in a print only environment in a prescribed physical space, but now required to respond to a demand for electronic access from a clientele both on site and distant. With the active participation of all librarians in collection analysis and development, the Library had to work in partnership with faculty to develop print and electronic collections to address the needs of faculty and students in arts and sciences and professional programs, several of which had a strong interdisciplinary component. The Library had to move from a reactive to a proactive service model after decades of classroom faculty participation in Library matters.

An Attempt to Revise the Allocation Formula

As stated earlier, one of the functions of the Senate Library Committee is to advise the University Librarian on matters pertaining to departmental library allocations. To anticipate the recommendation of the second External Review of the Library in 2004 that "the Senate Library Committee, in consultation with the Library and academic departments, review and revise the allocations formula ...", the Collections Development Librarian had read the literature on formula-based fund allocation.

A formula which seemed the best solution for MSVU corrected the least fair among the components: a count of the number of courses taught to replace a count of the total number of courses listed in the calendar; the average external book and periodical cost to replace the internal cost for books; a component that acknowledged the publication rates of the subject areas under each department to replace the component for total periodical cost to the department. The revision would better balance the demand components with ones pertaining to the external supply of scholarly publications as suggested in the literature (Mulliner 315-327).

In January 2006 the Collections Librarian presented his recommendations for the revision of the formula to the Senate Library Committee. Five equally weighted components and the calculation used to determine the allocations were to be retained. The enrolment component was unchanged; the calendar courses component was retained but the count would be for courses taught rather than courses listed; the material circulated component would be replaced by a materials used component encompassing books and journals consulted on site or borrowed or acquired via circulation, reserves, and document delivery; the average internal cost of a book would be replaced by the average external cost of relevant books and journals using information supplied by our vendors; and the total amount spent on continuations (i.e. journal subscriptions and monograph series) by each department would be dropped as a component and replaced by a component designated "publication rate" which would total the publication activity for subjects under each department and program.

The revised allocation formula was well received by the Senate Library Committee, but revealed its flaws during a test application using data collected according to the demands of the new components. The revised component of external monograph and serial costs benefited undergraduate programs in the Physical Sciences, but worked against the interests of Education, our largest graduate program, with its relatively inexpensive material costs.

Furthermore, after addressing those issues of inequity, new concerns continued to arise during Committee discussions. For example: one member observed that no recognition was given in the revised formula to those departments with higher percentages of students who were majoring in the field; another member felt that

a senior level course ought to be weighted more heavily than a first or second level course. It seemed obvious that a formula, no matter how carefully devised, would not be perceived as fair in all its components by every member of the campus community.

The new formula had workload implications as well. For the supply components, using external costs and publication rates rather than our former reliance on average internal costs would require the identification of reputable sources for both the traditional disciplines and interdisciplinary studies. On the demand side of the formula, the report on the revised formula recommended counting in-house book use and periodical use, including materials on reserve, in addition to the book loans by LC class range already counted for the existing formula. Staff time dedicated to collecting newly defined data for the formula could be better used to deliver services of immediate benefit to our students and faculty.

Another factor that discouraged the implementation of the revised formula was the necessity of submitting the revisions to the University Senate for approval. The formula's components, already in use since the early 1970s for monograph funding, and their subsequent application to both the print monograph and the print periodical fund allocation, had been formerly approved by the University Senate in December 1996. A review of the literature led the Collections Development Librarian to conclude that the revision of an allocation formula is frequently delayed or derailed by campus politics (Packer 276). Unless money can be added to the library's budget, thus ensuring that no department loses funds, the improved situation of one department is always at the expense of another.

Ultimately, the new formula failed to address the disconnect between selection activity and allocated funds - as in the past a few active departments such as History would continue to over spend while most departments would not spend their allocated amount. The report on formula revision neither addressed the challenge of engendering an interest among inactive faculty in selecting library materials for their departments and programs, nor defined a role for the librarians as agents to promote the importance of collection analysis and development.

Beyond Revision: Considering Other Approaches

If changes to collection development practice at MSVU were to be implemented without further delay, it was deemed advisable to side step the politics of allocation formula revision, and to investigate the possibility of incorporating the existing formula within a new model for collection development.

The features of the Access Model developed at the University of Guelph in 1999 seemed promising as an alternative to our formula-based allocation ("UG Library:

Acquisitions allocation mechanism"). At Guelph Library one pool of funds outside their allocation formula - 80% of the acquisitions budget - supported both print journal subscriptions and electronic journal access; a second pool of 20% of the budget used a combination of subject profiles for approval plan ordering, firm orders, and a temporary reserve allocation during the phase-in period. The Access Model was discussed at the Senate Library meeting in February, 2006. Members of the Committee appreciated the benefit of removing periodical expenditures from the formula application, but were not convinced that the acquisitions budget was large enough to accommodate both firm orders and the delivery of books and forms from a vendor's approval plan. An approval plan seemed most appropriate for libraries with monograph budgets sufficiently large to accommodate both purchasing by profile and title specific ordering.

The approval plan the Library had negotiated with John Coutts Library Services in 1990 was based on an assignment of Library of Congress class ranges to create subject profiles for the 22 departments and programs which existed at the time. Most departments received bibliographic notification forms and 11 opted for both forms and the delivery of books for review. The Library was retaining books of peripheral interest to ensure that the rejection rate, i.e., the number of books returned to the vendor, remained below 10% of the books received, and to lessen the work time and cost of repackaging and returning books to the vendor. Librarians and teaching faculty (if they agreed to participate) would have to create and refine profiles to match the subject areas for interdisciplinary programs and ensure a low rejection rate. Compiling effective profiles for the Professional Studies Faculty: Office Management (now Information Technology), Home Economics (now Applied Human Nutrition), and Child Study (now Child and Youth Study) was more challenging than doing the same for the departments in the Arts & Sciences Faculty with long established disciplinary affiliations, such as Economics or Mathematics, and well defined LC class ranges.

Ideally a new collections development model would combine the advantages of an approval plan which integrates the professional competencies of librarians into the process, and recognizes as well the traditional strengths of our immediate environment: the invaluable contribution of our classroom faculty to collection development and the unique, interdisciplinary programs offered by the University.

A New Model Emerges: The Fund Groups

In alignment with the University's commitment to interdisciplinary studies, the Library opted to revamp the collection development model. It should be noted that the final model at MSVU, which introduced the notion of allocations to groups of cognate disciplines simultaneously with the assignment of a liaison librarian to each group, was not directly copied from a model described in the literature or by a model currently in use. It seemed that most models using

allocation formulas at their core were resolutely department focused (Tuten and Jones 90). However, the approach to collection development adopted by Western Washington University Libraries questioned the rigidity of division by department and inspired the idea to use the Library of Congress classes as a rationale, rooted in the practice of librarianship, for the allotment of funds for Library collection purposes (Packer 284). The old model of funding 24 distinct departments and programs (Figure 1) would be reconfigured into five fund groups of cognate disciplines: Humanities, Social Sciences, Sciences, Business Studies, and Educational Studies.

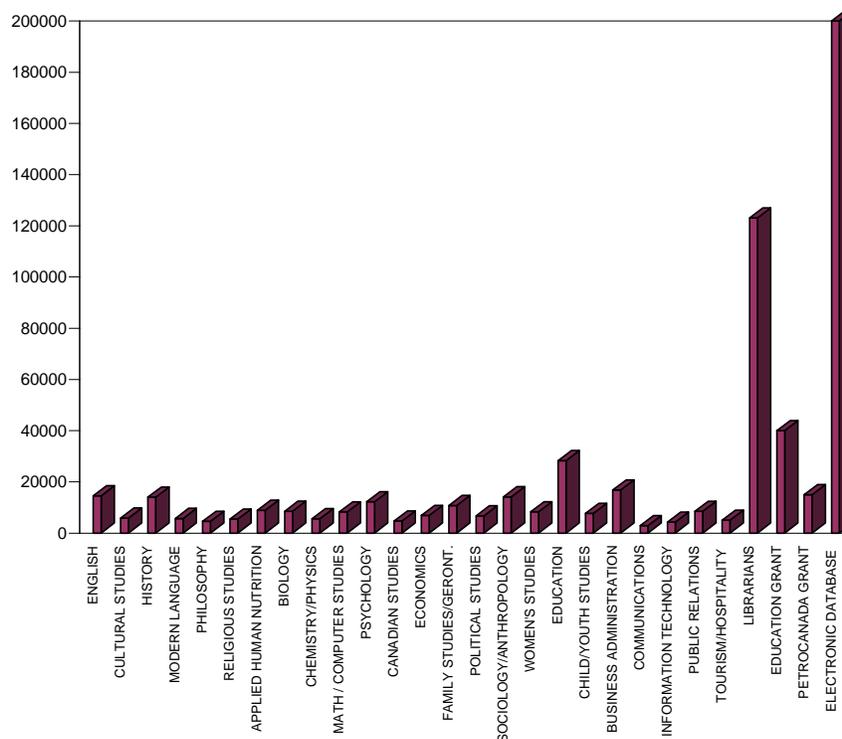


Figure 1: Allocation by department for the 2006-2007 academic year

The decision on which fund group to assign a department or program was based on several factors: the traditional assignment of a discipline; local practice, e.g. Psychology at MSVU had been grouped with the Natural Sciences in the calendar; the home department of a program coordinator, e.g. the Public Policy Studies program is coordinated by the Political Studies Department ; and the destination of the books ordered by a department in the collection, e.g. the tendency for books selected by the Child & Youth Study Department to be classified in L: Education. The classification of books by LC number was also used as an argument for assigning Canadian Studies, with its strong focus on socio-economic and political issues, to the Social Sciences rather than the Humanities even though the program coordinator was a historian. Useful guides for this purpose were the departmental/program profiles outlining LC class ranges by topic and current collecting intensities: "[Mount Saint Vincent University Collections Manual: Program Profile - Canadian Studies](#)" is an example of such a

guide.

The ultimate aim of the new fund groups was to embed the librarians within collection development; a significant departure from past practice. After almost four decades of book selections determined by the formula without significant intervention by the librarians, some senior faculty members routinely referred to the annual allocation as “our money”. Although many faculty members keenly observed the fluctuation of their department’s allocation total from year to year, the consequence was not necessarily an equally focused attention to the quality and direction of the collection. If this change was to be implemented successfully and was to be perceived by faculty as a positive development, it seemed advisable to link the fund groups with an invigorated service component made tangible by the assignment of a liaison librarian to serve the interests of each group.

Each of the five librarians was willing to be assigned as a liaison between the Library and a discipline group. It should be noted that it was only with the appointment of the Systems Librarian in 2006 that the Library now had a sufficient staff complement to realize a liaison service. A sixth librarian, employed as the University Archivist, agreed to participate in the service by assisting the librarian responsible for Educational Studies with the selection of materials to support the largest degree program at the University in enrolment, number of faculty, active course offerings, and dedicated funding. In addition to its allocation by formula, the Education Department receives a grant of \$20,000 per annum to support print subscriptions reassigned to Mount Saint Vincent University when Dalhousie and Saint Mary's Universities ceased to offer Education programs. The Education Grant and the PetroCanada Endowment Fund for Women's Studies resources are maintained as separate budget lines. The Social Sciences liaison librarian acts as the coordinator of the PetroCanada fund.

The original allocation formula has been retained: the annual allocations to the departments for print materials are now used to contribute to the total amount of funds assigned to the five new discipline groups.(Table 1) Each fund amount is approximately 20% of the total acquisitions budget assigned to print and electronic materials. The Library (reference and general) fund and the electronic resources fund are now apportioned equally among the five groups to support purchasing by the liaison librarian on behalf of the assigned group. The equal distribution of the Library and electronic resources (database) funds among the five disciplinary groups appears arbitrary, but the intention is to explicitly acknowledge in the acquisitions budget statement that a liaison librarian is present in each fund group to work as an active selector of both print and electronic resources, an evaluator of databases during trials, and a key advisor on renewals and cancellations. The Library attempts to meet the resource needs of all discipline groups as equitably as possible when licensing access to new database products.

Table 1: Allocation by Fund Groups 2007-2008

DISCIPLINE BASED FUND GROUPS. 2007-2008 BUDGET	
HUMANITIES FUND	
ENGLISH	\$6,675.00
CULTURAL STUDIES	\$2,036.00
HISTORY	\$6,417.00
MODERN LANGUAGE/LINGUISTICS	\$2,621.00
PHILOSOPHY	\$2,213.00
RELIGIOUS STUDIES	\$2,205.00
LIBRARY	\$13,888.00
DATABASES	\$76,800.00
TOTAL	\$112,855.00
SCIENCE FUND	
APPLIED HUMAN NUTRITION	\$4,335.00
BIOLOGY	\$3,896.00
CHEMISTRY/PHYSICS	\$3,147.00
MATHEMATICS/COM STU/STATS	\$4,361.00
PSYCHOLOGY	\$5,154.00
LIBRARY	\$13,888.00
DATABASES	\$76,800.00
TOTAL	\$111,581.00
SOCIAL SCIENCES FUND	
CANADIAN STUDIES	\$2,222.00
ECONOMICS	\$2,871.00
FAMILY STUDIES/GERONTOLOGY	\$5,185.00
POLITICAL STUDIES/PUBLIC POLICY STUDIES	\$3,270.00
SOCIOLOGY/ANTHROPOLOGY	\$7,070.00
WOMEN'S STUDIES	\$3,958.00
LIBRARY	\$13,888.00
DATABASES	\$76,800.00
TOTAL	\$115,264.00

EDUCATIONAL STUDIES FUND	
EDUCATION	\$14,345.00
CHILD/YOUTH STUDIES	\$3,704.00
LIBRARY	\$13,888.00
DATABASES	\$76,800.00
TOTAL	\$108,737.00
BUSINESS STUDIES FUND	
BUSINESS ADMINISTRATION	\$9,936.00
COMMUNICATIONS	\$1,016.00
INFORMATION TECHNOLOGY	\$1,946.00
PUBLIC RELATIONS	\$4,019.00
TOURISM/HOSPITALITY	\$2,888.00
LIBRARY	\$13,888.00
DATABASES	\$76,800.00
TOTAL	\$110,493.00
EDUCATION GRANT	
	\$35,000.00
PETROCANADA GRANT	
	\$15,000.00
TOTAL BUDGET	\$608,930.00

For example, in 2007/2008 the Department of Sociology and Anthropology has been allocated \$7,070 for print material purchasing. When the amount of \$17,506, apportioned among the remaining five Social Science departments, is added along with the \$13,888 from the librarians' General and Reference funds, the total amount available for purchasing print materials under the Social Sciences Fund group is \$38,464. When the \$76,800 for electronic resources is added, the Social Sciences Fund totals \$115,264. The larger fund groups temper the year to year fluctuations of a single department's allocation when revised data are entered.

It is now the responsibility of the Collections Librarian to monitor spending within each group to ensure that course and research needs are being addressed. The Collections Librarian reviews each order before it is given to the Orders Assistant for processing. At the request of the Collections Librarian, the Orders Assistant issues an internal report which indicates expenditures and encumbrances under each constituent fund of the group. One benefit of retaining the allocation by formula is to provide a gauge for the Collections Librarian to monitor the selection activity of each of the 24 departments and programs.

The discipline fund groups better reflect the real nature of research and course provision at MSVU. Each fund supports book selection for small interdisciplinary programs such as Peace and Conflict Studies and Public Policy Studies which had previously never been allocated funds. In the past faculty members would

request other departments to purchase books outside the boundaries of their home disciplines. Faculty, no matter their affiliations, may now submit orders to the liaison librarian whose assigned group most closely corresponds with the subject areas of the requested monographs. The liaison librarians are encouraged to select resources to support interdisciplinary programs.

From the budget perspective, this new configuration is not perfect. The introduction of a new course or a new program places a burden on the budget which can only be relieved by an increase in funds for library collections. Once the Library determines how much must be reserved for electronic subscriptions, the remaining funds are made available to the departments for print selection. In other words, the amount of money available to the fund groups for print monographs and periodical subscriptions depends entirely on how much has already been committed to electronic resources. The Library now spends 58% of the acquisitions budget on electronic resources compared to only 15% as recently as 2003/2004. The amount reserved for electronic resources increased by 106 % between 2006/07 and 2007/08; the result of the University's participation in the licensing agreements for Humanities and Social Sciences resources under the Phase 2 content expansion of the Canadian Research Knowledge Network, and a recent commitment to increase the acquisition of electronic book collections from Springer, Thomson Gale, and ProQuest Safari.

A New Model Emerges: Liaison Librarians as Consultants

The Library adopted the established designation of "liaison" for its "specific purpose of seeking input regarding the selection of materials" (ALA Reference and Adult Services Division 198), but also with the revised definition by the Reference and User Services Association of the American Library Association in mind: "Liaison work enables the library to communicate its collection policies, services, and needs to its clientele, and to enhance the library's public relations. Liaison work enables the library's clientele to communicate its library needs and preferences to the library staff and governing body ("Guidelines for Liaison Work in Managing Collections and Services." 107). With the new service model, the responsibilities undertaken by each of our liaison librarians correspond closely to those of the proactive "consulting librarians" at Cornell College (Donham and Green 314-321). A librarian's identity at MSVU will be reinforced by consulting responsibilities as a liaison with each discipline group while retaining the formal position title and functions as Systems Librarian, Extended Services Librarian etc. The librarians bring to their liaison role a formidable array of skills appropriate to the functions under their formal designations which will enhance the delivery of service to their assigned clientele.

Each faculty department still appoints a library coordinator who remains the main

contact between the liaison librarian and that department. Some departments have chosen to continue channeling book orders to the Library through the coordinator. Liaison librarians encourage individual faculty members to submit requests for materials directly to the Library. "[Role of MSVU Liaison Librarians, Departmental Library Coordinators, and Faculty Selectors](#)" provides a guide to assist all parties involved in materials selection.

The liaison librarian is not merely a passive recipient of faculty orders. The liaison librarian selects books on behalf of her assigned departments and the programs coordinated by the departments; reviews notification forms and publishers' announcements before sending them to the coordinator or to individual faculty; questions received orders if a viable alternative is available; listens to the expressed resource needs of students; and advises the library coordinator or course instructor when appropriate.

The type of intervention required from each liaison librarian is very much determined by the information needs of the discipline. The Library's experience confirms observations in the literature (Neville and Williams III 524). Information Technology and Computer Studies require the latest manuals which can be best served by providing access to an electronic book collection selected and renewed by the librarian. Humanities faculty members remain active selectors of print monographs; they are challenged by the need to select from a healthy addition of new titles each year, but do benefit from ready access to critical reviews in [Choice](#) and related publications.

From the perspective of invigorating the relationship between the librarians and classroom faculty and increasing opportunities for communication between the Library and the University, this new configuration has worked well during its first year of implementation and has great potential. The liaison librarians attend departmental meetings on a regular basis. The discussion at the meetings is far ranging and addresses not only collection needs and concerns, but also reference, instruction and general service requirements. For example, a meeting between the Sciences liaison librarian and members of the Biology Department resulted in an impromptu demonstration of the federated searching capability of the recently introduced Atlantic Scholarly Information Network (ASIN) Portal.

Research Partnerships

Liaison librarian duties encompass much more than book selection. A liaison librarian program can be used to develop partnerships towards achieving common goals based on a program of collaboration on projects involving both teaching faculty and librarians (Mozenter and Sanders 432).

Over the past year the Social Sciences liaison librarian, with a research interest

in information literacy, has collaborated with faculty colleagues in drafting a proposal for mandatory discipline-based information literacy courses for undergraduate students. Recently this same librarian has worked with a Sociology professor and her research assistants to create a web portal to resources on the social economy and sustainability. The Business Studies and Educational Studies librarians, after exploring Second Life as a virtual reference tool, have acted as consultants to a member of the Public Relations faculty assessing the instructional potential of Second Life within a course module. As suggested in the literature, this is true collaboration where each party brings goals to a partnership and then jointly defines and achieves the shared goals (Frank et al. 90).

It is to the University's advantage that all liaison librarians not only distribute and receive notification forms, but are active participants in reference service and bibliographic instruction. They bring to their liaison responsibilities skills that they have honed while attending to their non-liaison duties in document delivery, cataloguing, information literacy, and systems; are able to interpret and effectively address the library-related concerns of all constituencies within the academic community; and envision strategies to embed their expertise within the University's teaching and research missions.

Workload

All librarians have primary duties to perform in addition to their liaison responsibilities. Each year they are now asked to review at least 22,000 paper notification forms from vendors: Coutts Library Services, based on the original subject profiles used when the Approval Plan was in place; Midwest Library Service University Press (all subjects) / Science, Technology and Medicine Approval Plans; and the reviews published in Choice. This pre-sort and evaluation was not done before the liaison service was introduced. Previously, the Orders Assistant sent the forms to the departmental coordinator who selected material to order and forwarded this information directly to the Library. Under the new system, each librarian performs this function and will discard, order, or forward to faculty as appropriate. The librarian may annotate the form with information on other Novanet locations, earlier editions already in the collection, or alternative titles of possible interest. In light of other service demands, one liaison librarian who had been assigned disciplines with robust publication rates, had to withdraw from the vetting of paper forms and the task has not yet been reassigned.

All librarians have maintained their commitment to meet with their assigned departments on a regular timetable and provide information and advice. At a meeting in August, 2007 the librarians expressed their willingness to meet the challenges inherent in providing an effective liaison service, and reviewed the progress to date. Direct access by faculty to the electronic notification forms

posted weekly by Coutts was discussed as a viable alternative to the physical distribution of the paper forms, but has not yet been implemented.

Lessons Learned While Managing Change

The literature on information gathering practices and needs among interdisciplinary scholars, and on formula-based budget allocation served as source material for two reports by the Collections Librarian which ultimately engendered a new approach to collection development.

The many years of discussion at the Senate Library Committee educated our faculty both in the problems inherent in the formula allocation and in the difficulties in arriving at a solution which would be acceptable to the majority. Those futile efforts at instituting modest changes in fact demonstrated the willingness of the librarians, in collaboration with faculty colleagues, to spend time and effort to arrive at a plan of greatest benefit to the academic community. In particular, the so-called "silo" approach to budget management ill served the collection needs of interdisciplinary scholars and teachers at Mount Saint Vincent University.

The librarians who had had little involvement in collection development have become enthusiastic participants in the liaison librarian service. The librarians have enhanced their skills in both public and technical services since becoming actively involved in materials selection. They have also initiated and maintained a greater number of contacts with departments and individual faculty. Finally, they continue to learn about the varieties of discourse among the academic domains.

Conclusion

When the Library asked students and faculty to complete the LibQUAL+ survey in early 2007, 432 members of the University community responded. Of the total respondents, 204 added comments with 41 mentioning collection inadequacies. In three years time the next LibQUAL+ survey will be completed. It is the hope of the MSVU Library that the respondents will report a positive change in collections and in all aspects of Library service to our community.

As of September 2007 it has been a full year since the fund groups and the liaison service were introduced in tandem. To date informal discussions have taken place with the Senate Library Committee and the liaison librarian colleagues to assess progress and concerns. During the fall term the University Librarian will review the previous twelve months' experience and consider the results of a web-based survey based on the questions used at the University of Florida to evaluate its liaison program (Tennant et al. 402-409). The [Library](#)

[Survey on Liaison Librarian Service](#) was distributed to 152 full-time faculty members as an email link. Of the 38 individuals who responded to the survey over the one week period, all supported the continuation of the program. The liaison librarian model will be retained; however, the responses to the survey will inform decisions on how to improve the service.

MSVU is optimistic that once the issue of increased librarian workload has been addressed, the new model will be accepted as a definite improvement when compared to past practices. Moreover, it is hoped that the new model will be viewed as an important contribution to redefining and enhancing the position of the Library. The final draft of the strategic plan for the University was distributed in October 2007. A strategy in the plan to promote flexible learning approaches, with the intention that these approaches will achieve one of the academic goals of Destination 2012, - "accessibility: to increase opportunities for students to participate in MSVU programs" - suggests that the Library will be challenged to expand even further its repertory of electronic resources. Destination 2012 will be in place to provide some insight into the strategies the librarians must adopt to realize their own goals for collection development over the next five years, and establish themselves as key participants in the teaching and research missions of the University.

¹ Using History as the example: $\$4,393 \times 1.462 = \$6,417$ for the 2007-2008 allocation to that department for the purchasing of print materials by members of the department.

Works Cited

ALA Reference and Adult Services Division. "RASD Guidelines for Liaison Work." RQ 32.2 (1992): 198-205.

"Association of Atlantic Universities > Home." 18 Oct. 2007
<<http://www.atlanticuniversities.ca/>>.

Budd, J. M., and K. Adams. "Allocation Formulas in Practice." Library Acquisitions 13.4 (1989): 381-390.

Destination 2012: The Strategic Plan of Mount Saint Vincent University. Halifax: Mount Saint Vincent University, 2007.

Donham, Jean, and Corey Williams Green. "Developing a Culture of Collaboration: Librarian as Consultant." Journal of Academic Librarianship 30.4 (2004): 314-321.

Elteto, Sharon, and Donald G. Frank. "The Politics of Survival in the Postmodern Library." portal: Libraries & the Academy 3.3 (2003): 495-501.

Enrolment Update: December 2006. Halifax: Mount Saint Vincent University, 2006.

Frank, Donald G., et al. "Information Consulting: The Key to Success in Academic Libraries." Journal of Academic Librarianship 27.2 (2001): 90-96.

"Guidelines for Liaison Work in Managing Collections and Services." Reference & User Services Quarterly 41.2 (2001): 107-109.

Ingalls, Wayne. Presentation to External Reviewers. Halifax: Mount Saint Vincent University, 1991.

Jaguszewski, Janice M., and Laura K. Probst. "The Impact of Electronic Resources on Serial Cancellations and Remote Storage Decisions in Academic Research Libraries." Library Trends 48.4 (2000): 799-820.

Klein, Julie Thompson. "Interdisciplinary Needs: The Current Context." Library Trends 45.2 (1996): 134-154.

Kotter, Wade R. "Bridging the Great Divide: Improving Relations between Librarians and Classroom Faculty." Journal of Academic Librarianship 25.4 (1999): 294-303.

"Library Survey on Liaison Librarian Service." 31 Oct. 2007
<<http://www.msvu.ca/library/LiaisonLibrarian.pdf>>.

"Mount Saint Vincent University Collections Manual: Program Profile - Canadian Studies." 25 Oct. 2007 <<http://www.msvu.ca/library/collanal-canada.asp>>.

Mozenter, Frada, and Bridgette T. Sanders. "Restructuring a Liaison Program in an Academic Library." College & Research Libraries 61.5 (2000): 432-440.

Mulliner, Kent. "The Acquisitions Allocation Formula at Ohio University." Library Acquisitions: Practice and Theory 10 (1986): 315-327.

Neville, Robert, and James Williams III. "Faculty-Library Teamwork in Book Ordering." College & Research Libraries 59.6 (1998): 524-533.

Packer, Donna. "Acquisitions Allocations: Equity, Politics, and Formulas." Journal of Academic Librarianship 14.5 (1988): 276-286.

Paris, Terrence. Library Support for Interdisciplinary Scholarship in Colleges and Universities: Lessons from the Recent Literature. Halifax: Mount Saint Vincent University, 2003. <<http://www.msvu.ca/library/interdisciplinarity.pdf>>.

---. Proposal for the Revision of the Library Materials Allocation Formula at Mount Saint Vincent University. Halifax: Mount Saint Vincent University, 2004. <<http://www.msvu.ca/library/allocformtxt1.pdf>>.

"Policy for Acquisitions Allocations." 22 Oct. 2007 <<http://www.msvu.ca/library/collpolacqform.asp>>.

"Role of MSVU Liaison Librarians, Departmental Library Coordinators, and Faculty Selectors." 21 Oct. 2007 <<http://www.msvu.ca/library/libcoordoc.asp>>.

Salter, Liora, and Alison Mary Virginia Hearn. Outside the Lines : Issues in Interdisciplinary Research. Montreal: McGill-Queen's University Press, 1996.

Tennant, Michele R., et al. "Evaluation of a Liaison Librarian Program: Client and Liaison Perspectives." Journal of the Medical Library Association 94.4 (2006): 402-409.

Tuten, Jane H., and Beverly Jones, eds. Allocation Formulas in Academic Libraries. Vol. #22. Chicago, IL: College Library Information Packet

Committee, College Libraries Section, Association of College and Research Libraries, American Library Association, 1995.

"UG Library: Acquisitions allocation mechanism." 17 Oct. 2007

<http://www.lib.uoguelph.ca/services_for/faculty_and_graduate_students/collections/accessmodel.htm>.

Werking, Richard Hume. "Allocating the Academic Library's Book Budget."

Journal of Academic Librarianship 14.3 (1988): 140-144.

Westbrook, Lynn. "Information Needs and Experiences of Scholars in Women's Studies: Problems and Solutions." College & Research Libraries 64.3 (2003): 192-209.