Process for creating a recommendation for the WPLC annual buying pool allocation

This document outlines a process for creating a recommendation for the WPLC annual buying pool allocation. One of the goals for this proposed process is to provide an organized way to gather input for consideration of the collection and the vendors that supply the collection. This process gives the opportunity to consider the collection as a whole on an annual basis and to identify areas for change in collection areas, formats, and/or vendors.

Changes to the collection, including changing/adding formats, collection areas, and/or vendors should be considered as part of an annual process unless the need for this change is immediate. As changes are proposed, the Digital Library Steering Committee will consider the proposal and determine if the proposal should be acted upon immediately or should be considered as part of the annual process.   If the proposal is not acted upon immediately, the WPLC project manager will add the proposal to a list to be considered as part of the annual process.

Outline of the annual process

Below is a table outlining the activities in this annual process. The activities involve three or more groups:

1. The Digital Library Steering Committee
2. The Collection Development and Policy Workgroup
3. Workgroup(s) considering specific formats or collection areas, including consideration of associated vendors.

The first two groups will be involved each year. Workgroup(s) considering specific formats or collection areas will only be created if deemed necessary by the Digital Library Steering Committee.

The "By" dates in the table below are deadline dates of activities. The actual dates that these activities will be completed will change based on the calendar year and on the meeting schedule/availability of the groups involved.

What	By
The Digital Library Steering Committee discusses collection areas/formats that have been proposed during the year along with any other areas/formats of interest or other concerns/questions about the collection to provide direction to the Collection Development and Policy Work Group and to determine if other workgroups need to be formed to consider specific formats or collection areas.	December 1
The WPLC project manager, with feedback from the Digital Library Steering Committee, develops timelines and charges for the Collection Development and Policy Work Group and any other workgroups that need to be formed to consider specific formats or collection areas.	December 14
The WPLC project manager, with feedback from the Digital Library Steering Committee, populates the Collection Development and Policy Work Group and any other workgroups that need to be formed to consider specific formats or collection areas.	December 30
The WPLC project manager arranges trials of products for workgroup(s) formed to consider specific formats or collection areas. The trials continue until a recommendation is finalized (by February 27). The WPLC project manager creates a document comparing products under consideration for specific formats or collection areas. Trial information and the document are shared with the workgroup(s)	January 9
The WPLC project manager creates a document outlining the collection areas, previous year expenditures, basic usage statistics, collection size, known concerns, ideas to change spending, and other helpful information and shares with the Collection Development and Policy Workgroup. The WPLC project manager send the Collection Development and Policy workgroup a draft patron survey that will collect information related to the proposals and capture patron concerns about the collection.	January 10
The Collection Development and Policy Workgroup meets by phone to review charge, prepared document, and patron survey, and to identify additional concerns, ideas for changing spending, and additional information needed.	January 17
Patron survey is available for response.	January 21 – February 5
The workgroup(s) considering specific formats or collection areas meet to review the comparison document and to determine other information needed based on the document and experiences up to this point with the trials of the products.	January 23
The WPLC project manager creates a draft library survey to collect information related to the proposals and concerns about the collection and shares with the Collection Development and Policy Workgroup.	February 4
The WPLC project manager sends the Collection Development and Policy Workgroup a summary of the patron survey and a final version of library survey for review. The library survey will have been updated to include any concerns identified from the patron survey results.	February 12
The WPLC project manager gathers information from vendors and other sources, including the patron survey, for the workgroup(s) considering specific formats or	February 13

collection areas, updates the comparison document, and shares the document with the workgroup(s).	
Library survey is available for response.	February 19 – March 9
The workgroup(s) considering specific formats or collection areas meets to make a recommendation on the format or collection area under consideration.	February 23
The WPLC project manager finalizes the recommendation from the workgroup(s) considering specific formats or collection areas and shares this recommendation with the Collection Development and Policy Workgroup.	February 27
The WPLC project manager creates a summary from the library survey and updates the document of information to include the survey results, recommendations from the workgroup(s) considering specific formats or collection areas, and additional information identified. All information is shared with the Collection Development and Policy Workgroup.	March 17
Collection Development and Policy Workgroup meets in person to review information collected and make a recommendation of allocation of the buying pool for the next calendar year.	March 24
The WPLC project manager prepares a document outlining the recommendation. The Collection Development and Policy Workgroup receives this document for their review.	March 26
The WPLC project manager finalizes the document outlining the recommendation based on feedback from the Collection Development and Policy Workgroup.	March 31
The WPLC project manager creates the buying pool share amounts for each system based on the recommendation.	March 31
The Digital Library Steering Committee receives the document outlining the recommendation and the proposed buying pool share amounts.	April 1
The Digital Library Steering Committee, at a phone meeting, reviews the workgroup recommendations and develops and approves a draft buying pool recommendation.	April 20
The WPLC project manager modifies the recommendation document and buying pool shares based on the recommendation of the Digital Library Steering Committee.	April 21
The Digital Library Steering Committee members discuss the recommendation with other libraries in the system they represent.	May 20
The Digital Library Steering Committee takes action on the recommendation.	May 28
The WPLC Selection Committee discusses the recommendation and determines what, if any, collection policy changes need to be made to accommodate changes in the digital collection.	June 1
The WPLC project managers create a draft of an updated collection policy based on the decision of the Digital Library Steering Committee and input from the WPLC Selection Committee. The Collection Development and Policy Workgroup receives draft of updated policy.	June 20
The Collection Development and Policy Workgroup meets by phone to take action on the updated collection policy.	July 1

The WPLC project managers prepare a final draft version of the updated collection policy. The draft document is shared with the Digital Library Steering Committee for action at their July meeting.	July 8