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Library Marketplace — Gifts and Deselection Manager: The Free and Open Source Program for Weeding and Growing Library Collections

Column Editor: **John D. Riley** (Regional Sales Manager, BUSCA, Inc.) <jdriley@comcast.net> www.buscainc.com

Column Editor's Note: *The innovative team at GIST (Getting It System Toolkit) based at SUNY Geneseo has done it again! After creating the powerful interlibrary loan and acquisitions system known as GIST, they have now released the very useful stand-alone Gifts and Deselection system. If you aren't familiar with GIST, this is a brief description from their Website: "The purpose of GIST is to provide a new model and useful tools to integrate and optimize acquisition and interlibrary loan services and to promote regional collection diversity. It is a system for merging Acquisitions and ILL request workflow using one interface, enabling user-initiated requests, coordinated collection development, and acquisitions." I have admired the GIST system for a while, and I finally got a chance to sit down over lunch with the whole team and ask them a few questions about their Gifts and Deselection Manager (GDM).*

Your Gifts and Deselection Manager (GDM) is a truly revolutionary tool that allows libraries to easily handle the weeding process with full assurance that they are not removing items that are vital to the library. Tell us how you developed this part of the GIST package and why you decided to create it.

GIST GDM Team (Tim Bowersox, Cyril Oberlander, Kate Pitcher, Mark Sullivan,): GDM's collection evaluation tool was developed to help library staff save time through a thoughtful workflow based on criteria that would otherwise take them a great deal of time to compile. This was based upon our own experience in 2009, where it took us the entire summer to evaluate the reference collection because we had to manually search **Hathi Trust**, **Google Books**, **Worldcat holdings**, etc. With additional major weeding projects on the horizon, we sought to convert this workflow into an automatic and batch process.

Fortunately, many of the services we consulted had APIs, so we could automatically retrieve the exact same data we needed in seconds, rather than minutes. By incorporating a batch analysis tool, we could run an entire list of ISBNs and OCLC numbers in a fraction of the time it would take staff to manually check the same items. In addition, the GDM has a weighted and fully-customizable collection-building profile (based upon the OCLC Conspectus) that provides a recommendation for each and every item. The result was a list of titles, criteria, and recommendations to keep or deselect each item.

Evaluating data for weeding title by title or batch titles en masse GDM automatically creates a spreadsheet for evaluating tens of thousands of titles (we found that over 13% of our 31K items we evaluated were available as full text in the **Hathi Trust**); GDM also works for evaluating journal titles across consortia.

When we looked at how many other libraries are rethinking or refreshing their collection, the order of magnitude seemed like it would cost libraries too much time needed for developing new services. In order for libraries to do other things, the manual collection analysis for moving collections to storage, weeding, digitizing, etc., all had to become automated. GDM helps us focus on the next priorities, such as digital scholarship, publishing services, project management, and instructional design services. We hope other libraries can save their staff time and devote much-needed talent and time to developing innovative library services — the local and network value of shared benefits is tremendous.

What are APIs? Who do you use them with? Are they easy to set up?

GDM Team: Application programming interface (APIs) are specifications that allow software to communicate with each other, in other words, GIST GDM uses OCLC's API to utilize bibliographic and holdings data, and APIs from Amazon, Better World Books, Google Books, and Hathi Trust to evaluate other data about the books. GIST GDM makes using APIs very easy. Just follow the documentation; it guides you to the site to obtain unique keys to access the data sources.

The Gifts Management portion of GDM makes receiving gifts a viable enterprise again. Many libraries stopped accepting gifts because of the expense and amount of work involved. GDM streamlines the process and even earns the library some money along the way. You have been able to add quite a few books to your collection as well. Could you tell us how and why this part of the GDM was developed? Were you turning down gifts before its development?

GDM Team: Gift workflow management was the first component built with GIST GDM because there was no product out there that we knew of to help us streamline the workflow, and because we wanted to save time and effort spent on processing gifts. How do we make the process more streamlined with our collection-building profile and cooperative collection development criteria in mind? The solution took almost one

year to develop, and **Mark Sullivan** wrote, tested, and re-wrote the 20K+ lines of code to make it all happen. We also wanted to thoughtfully develop our print collections at a time where many libraries are cutting back their print monograph acquisitions. Before GIST GDM, our practice of receiving gifts was slow and not encouraged. Since GIST GDM, however, we have placed donation boxes near the entrance of the library and another location on campus, and have promoted donations to faculty and students. In the start of using GIST GDM, we received 4,324 items in 13 months, and acquired only 16% or 713 items that were valued at \$49K in Amazon. The items not acquired were sent to **Better World Books**, and any revenue generated from sales went into building new collections.

I've noticed more libraries going back to running book sales or running ongoing sales in the library. They have found that it creates a lot of goodwill, feeds books back into the local community, and might actually increase gifts to the libraries. As for increasing gifts to the library, one function of the Gift Manager that I think is particularly useful is the "acknowledgement letter generator." We all know that dealing with donors' difficult requests is one reason gifts are sometimes discouraged. Your system allows the donor to receive an itemized list of each donation and use it for getting an outside appraisal for tax purposes. I think that this will encourage more gifts, especially since donors can now self-appraise up to \$5,000 in value of their donation according to IRS regulations. How have donors responded to this development?

GDM Team: Donors appreciate a thank you letter, and as long as it is an automated process, library staff should too. GIST GDM's donor letters only supplies required data; donor name, address, title, author, format (Hardcover, etc.), and total number donated so that donors have an easier time filling out their taxes, it does not however supply the value of the specific items.

You developed GDM from the ground up, and you are now offering it as a free and open-source program. How easy is it for other libraries to implement GDM? Do they have to belong to the GIST community to use it?

GDM Team: Because GIST GDM is a stand-alone application that is easily downloaded, it is relatively easy for libraries to implement. The most common issues with installation are due to skipping parts of the

continued on page 59

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Library Marketplace from page 58

implementation instructions, miscopying API keys into the GDM Settings, or trying to run GDM on unsupported systems (Windows XP, typically). For the most part, Mark has worked with these libraries one on one. However, we created the GIST-L listserv to help the community of GIST libraries share experiences, discuss questions, etc. Users can also email us at <dev.team@gistlibrary.org> with questions or suggestions.

How do libraries deal with the differences in bibliographic data between their catalogue and other libraries' catalogues when using GDM?

GDM Team: GIST GDM uses Worldcat for the holdings and bibliographic record, while the Z39.50 link to your own catalog is a way to evaluate what edition and location your catalog has for the item. Some libraries may want to use their consortia catalog to compare holdings within GDM.

GDM fits in with your vision of the library as a constantly evolving and self-directed resource for the university. You have decided to not just sit back and wait for change to happen. You are embracing and making change happen. I think this

library is a great model for others to emulate. Could you tell us a little about your philosophy as it relates to building a sustainable library for now and the future?

GDM Team: Our philosophy is to work with our colleagues and vendors to develop the solutions needed to transform libraries. We also look for problems with scale — if it saves us 1,000 hours of work a year, imagine the collective impact this has on the roughly 200 other libraries currently using it. Not only does this help us all build and maintain better collections, but it also helps us focus on developing future library services. With so many libraries turning their attention to the topics of value and assessment, we simply can't afford to carry on business as usual. Though change can be daunting, it's much easier to get through if we all work together.

Could you list the Websites that interested libraries should consult to find out more about GIST and GDM initiatives? When is your next GIST users meeting?

GDM Team: The easiest way to find out who is using GIST in your neighborhood is to join the GIST-L listserv and ask by state, etc. However, at the next IDS Conference — summer 2013 — there will be an exciting GIST Institute, so stay tuned at gistlibrary.org. 🐼

For More Information About GDM

Visit this Website: <http://www.librarytechnology.org/litg-display-text.pl?RC=15003>.

And Be Sure to Read: *Against the Grain*, (v.23 #1; February, 2011; p.73) Biz of Acq — The Getting It System Toolkit (GIST) and Changing Workflow in Acquisitions and Collection Development by Kate Pitcher — GIST changes library workflow and is a new request system for Acquisitions and ILL.

Thanks to the GIST Team based at Milne Library, SUNY Geneseo

Timothy Bowersox, Information Delivery Services (IDS) Librarian; **Cyril Oberlander**, Library Director; **Kate Pitcher**, Head of Technical Services and Collection Development; and **Mark Sullivan**, IDS Project Executive Director.