A First-Year Librarian's Weeding Project Management Experience from Start to (Planned) Finish

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Abstract:
This paper will provide an adaptable roadmap for weeding a monograph collection at a small academic library. When starting straight out of library school as the first Collection Development Librarian for the St. Edward's University library in July 2010, I was confronted with a monograph collection that had never been weeded in any systematic way. As a small liberal arts university library, it is not our mission to collect comprehensively but rather to support the current curriculum, which is focused on social issues in a global context. Yet, there we were with a dusty, dated, unused collection filling the shelves. The original goals of the weeding project were to remove outdated and unused materials from the collection and to discover areas where materials should be replaced or built upon. As will be discussed, a new more pressing goal presented itself during the course of this project. I will outline the process I went through to develop criteria for weeding the collection and how these criteria were adapted to different subject areas based on the curriculum of a given department. I will highlight the tools I used to generate lists of items to be weeded after the criteria were set and how to keep track of progress using SpringShare LibGuides. Lastly, I will cover the most unanticipated challenge in managing this project: the human element, in the form of both faculty and librarian colleagues reluctant to weed. The project is ongoing with the goal of having an entire collection review completed by May 2012.

Introduction

St. Edward's University is a small, Catholic liberal arts school that has grown in size and ambition over the last 10 years without the campus library exactly matching or reflecting this growth. The curriculum had been completely overhauled to focus on current social issues and globalization and library research within these areas. Other disciplines' information needs had either migrated online or shifted away from monographs entirely. The library collection, while weeded piecemeal over the years, had never been reviewed systematically to reflect these new developments in the curriculum. This was partially because no collection development policy existed to dictate criteria for weeding and partially because prior to the creation of my position there had been no collection development librarian project managing and pushing typically back-burner collection maintenance to the forefront. The original goal of this project was to create a more relevant, highly used print collection, but then we were thrown the happy, though stressful curveball of a donation to renovate the library. In the new learning commons space there will be approximately half the space that we currently have for the print collection so this project has taken on a greater sense of urgency recently. We would not be provided any off-site storage for the rest of the collection and

have had to decide what we could remove from the collection entirely. We are still on target for a May 2012 completion of the collection review, which is when it will all be packed up and moved into storage during the renovation.

The Policy

The first step in the process was developing a policy that could stand up to questions and concerns from both librarian colleagues and campus faculty. I looked at policies from many other comparable libraries for an indication of what were reasonable criteria both for selection and de-selection of materials. Especially useful were the policies from the Wilson W. Clark Memorial Library at the University of Portland, the MacPhaidin Library at Stonehill College and the Dewitt Wallace Library at Macalester College. All of these schools are teaching institutions that do not keep materials in perpetuity, but rather support the current curriculum taught by the faculty. St. Edward's is also a teaching institution of just over 5,000 students and the policy reflects this by focusing on the importance of supporting the curriculum. In addition to supporting the current social issues and globalization curriculum, the library also had to meet the needs of robust religious studies and philosophy departments and masters programs in business, counseling, and liberal arts.

Other disciplines use the collection, but these are the ones that incorporate library research into their curriculum more heavily.

I decided to define "supporting the current curriculum" as the items circulating. If an item is being checked out with some regularity, more likely than not it is because someone is using it for one of their classes. Therefore, books that hadn't had any kind of use—circulation or recorded internal use—in the past five years were up for review. Five years was selected because that is when the library switched to Millennium for its ILS and the data would be easier to read. We had partial circulation data (just total checkouts, not the date of last check out) from our previous ILS, which would come into play later

in the project. If a book was more recently added to the collection, it didn't seem fair to hold it to the same criteria, so in addition to use, we also looked at the age of the book and, if applicable, the length of time on the shelf. If a book is 20 years old or older and hadn't circulated in the past five years, it became a weeding candidate. These were the criteria used to generate lists for the systematic weeding project, but in addition to these, books would be weeded if they were outside the scope of the curriculum, inappropriate content level (we still had many books from when St. Edward's was an all-boys high school in the 19th century), redundancy, and physical condition. These books were not included in the larger weeding project, but used as guidelines for ad hoc weeding.

Evaluation Consideration	Original Criteria
Use	No circulation for at least 5 years
Age	At least 20 years old or older (at the start of the project, published prior to 1991)
Time on shelf	At least 5 years

The Project

We began the weeding project by generating lists of materials up for review (those items 20 years old or older, on the shelf at least five years and no use in the past five years). The first pass at generating these lists involved plugging the review criteria (publication date, last checkout) into the Create Lists function in III's Millennium. I would then export these lists to Microsoft Excel to manipulate. My relative inexperience with Millennium meant that inevitably something would slip through the cracks or I would be making the same list five different times before getting it right. I wanted to be as thorough as possible, so instead of starting with a narrowed list, I began creating lists of everything on the shelf within a subject's call number range (all of the M's, for example). I exported the following fields from Millennium into Excel: call number, title, date published, total checkouts, last checkout date, year-to-date circulation, last year circulation, date added to the collection and internal notes, which is where internal use is recorded. The internal notes field is also where donation information was recorded and as a general rule we tried not to discard gift materials except in cases of condition. Then I could sort them by copyright date and last checkout

date and use that list as the review list. The end product would be a list of items that fit our criteria that were not gifts or had not been on the shelf for at least five years.

Once the lists were created, I had to figure out the best way to share this information and create a step by step workflow guide to the weeding process. I decided to go through the process myself before inflicting it upon my colleagues. I started with a smaller section of one of my subject areas to test the effectiveness of the lists and the best way to work with faculty. We have a very small music program that focuses almost entirely on performance, so the library collection was correspondingly small and not exactly supporting the curriculum. I sent a spreadsheet of the materials up for review to the music faculty, two people, only one of whom teaches a non-performance course. I only heard back from this professor and he was adamant that we retain everything in the area. Then he actually reviewed the Excel spreadsheet of materials up for consideration and he conceded that at least a third of the titles up for review could be removed from the collection. I knew there would be baby steps involved with some of the more library-oriented

professors like this one, but at least they were baby steps in the right direction. For the items that he indicated should be kept in the collection, I inserted an internal note into the item record in the catalog stating "Do not weed per [faculty member's name]" along with the date and my initials, that way in future weeding projects we would have a record of decisions made about these items. Most of the items that fit the weeding criteria that were kept were either deemed classics in the field by the faculty member or still pertinent to the curriculum.

Following my trial run, I sent the lists of materials for evaluation to the subject liaisons to review and then send on to their faculty for their feedback. I used SpringShare LibGuides to keep track of the progress across the subject areas and discussed reasonable deadlines for each subject area with the librarian in charge. The LibGuide was the hub for useful links, documents like weeding progress reports and any updates on the project as it went along. The goal of creating deadlines was to create a sense of urgency for withdrawing materials and a finish line to work toward, but even then some librarians did not place this project among their priorities. Subject specialists handled their areas differently and in at least one case improved upon the process by providing a better breakdown of the data. For the psychology collection, the subject librarian deferred to his library assistant to create an analysis of the collection before and after the withdrawal. She used Excel to analyze age of the collection and average recent use (defined as use within the past two years) and how those would change after the weeding. The tables she created painted a stark picture of collection use: 1982 titles (41% of the collection) fit the criteria and were removed, with 28% of those never having circulated (See Appendix).

Faculty involvement in this process was crucial because they create the curriculum that the collection is meant to support. They would be able to tell us which items might still be relevant in the future and which were classics in the field that should be retained. The main problem was convincing them of the need to get rid of any books at all given the common perception that the library should keep books just because they might be used at some point in the future for an undetermined reason, but I was hopeful that if they just looked at the materials, like the music professor, they would realize that much of these books were not appropriate for our collection. We presented the arguments that are used in the library literature: weeding will result in a collection that is more relevant to the students and as a result will probably circulate more. We tried to tailor the feedback channels to faculty preferences, so we received recommendations in the form of a marked up spreadsheet, someone walking through the stacks pulling books or someone reviewing the books to be weeded once they have been removed from the collection and selecting those to be retained.

In all cases, faculty members were given firm deadlines and reminders of those deadlines before any action was taken. If we did not hear back from them, we assumed they agreed with our decisions. Even if they simply ignored our requests for feedback, we would feel that we had done our due diligence in requesting it. The level of involvement varied by discipline, with departments like Theater not giving any feedback to the Art professors coming in to pull the books themselves so they could review them. Then there were departments, like English and Religious Studies, who were adamant that we not get rid of anything. It became clear that we were going to have to modify the requirements slightly for disciplines like these where information takes longer to go out of date. For these, we adjusted the "last circulated" criteria from five years to 18 years, which is when we started recording circulation data electronically. Those items that had a "0" in the "Total Checkouts" field were placed on the review lists. This reduced the number of books up for evaluation, but the numbers were still considerable—for example over 11,000 of the 20,000 or so items in the history collection fit the original criteria and after adjusting to the new requirements that went down to 7,000.

Evaluation Consideration	Modified Criteria
Use	No circulation for at least 18 years
Age	At least 20 years old or older (at the start of the project, published prior to 1991)
Time on shelf	At least 5 years

The last part of this process, once we had a faculty-approved list of items to pull, was the physical processing of the items. Depending on the subject, either the librarian, the student workers, or even a faculty member would pull the items from the shelves. We were processing such a high volume of materials we had to train two technical services student workers to withdraw the books from both Millennium and OCLC. The Technical Services Librarian also developed methods for batch processing these items with the Global Update function in Millennium. This meant that the individual items just had to be scanned once into Create Lists and then could be updated at the same time, streamlining the process. Once the items had been removed from the catalog and the barcodes crossed out, the majority of the books were boxed up and sent to Better World Books to be re-sold or recycled. We also gave away books to the campus community during National Library Week, which generated some good will even though people were not thrilled we were weeding the collection.

The Twist
After working on the project for a year and withdrawing approximately 11,000 items from the collection, we received the news in August 2011 that the library was going to be renovated. This was obviously great news but came with a big caveat: In addition to the collection going into storage with no access to it for the year during construction, there would be half as much shelf space for it in the new building. These decisions meant that we needed to withdraw an additional 30,000 or so items in the same amount of time it took to cull 11,000. The positive is that the large sections of history, religious studies and philosophy, yet to be weeded, will yield another 10,000 items for discard. This count includes the bound periodicals that had already been weeded, but that will also require another pass. Then, whether the faculty like it or not, we're going to have to go back through those sections of the collection that were less stringently weeded, pulling out the items that fit the original weeding criteria. This news has also had the added bonus of finally lighting a fire under my colleagues who had been dragging deadline by which we need to meet that goal. Beyond needing space for the current collection, problem as time goes on as we are focusing heavily on developing our e-book collections to supplement and partially replace the print titles. These e-book collections will be the only ones available to our community during the library's closure for renovation and we have already gotten resistance from the faculty in the monograph-heavy fields. The construction project is just accelerating our momentum in a direction we were already heading; we just have to get the rest of the campus community up to speed. This transition is a discussion for another time, though. First, I have to finish the withdrawal of nearly half of our collection.
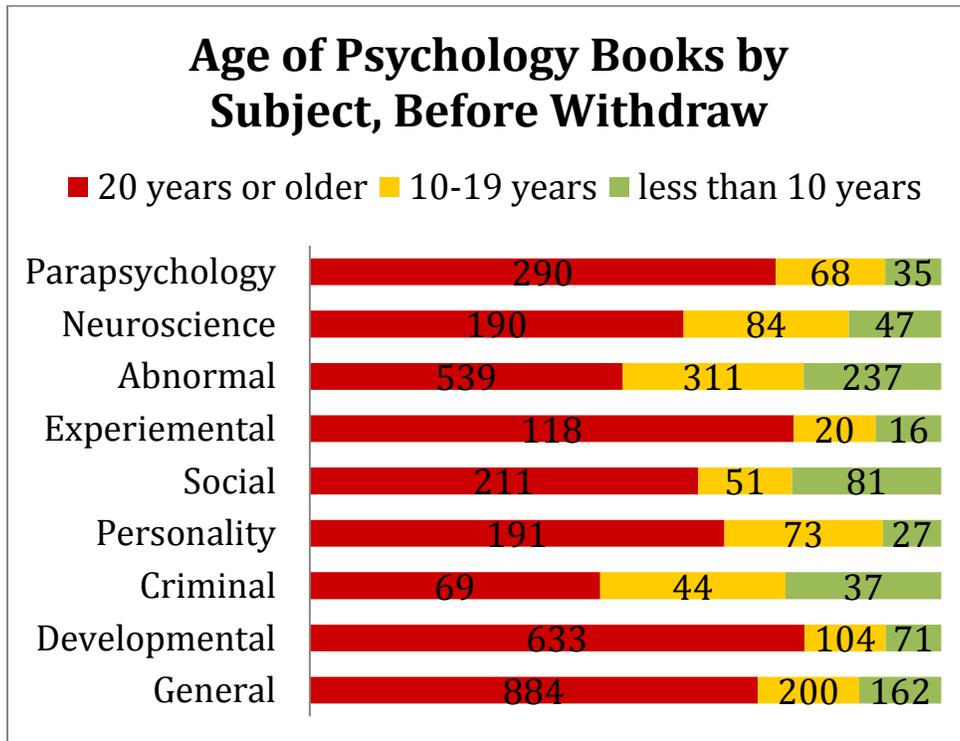
Figure 1. A breakdown of the psychology collection by age and subject area before weeding.

Age of Psychology Books by Subject, After Withdraw

■ 20 years or older ■ 10-19 years ■ less than 10 years

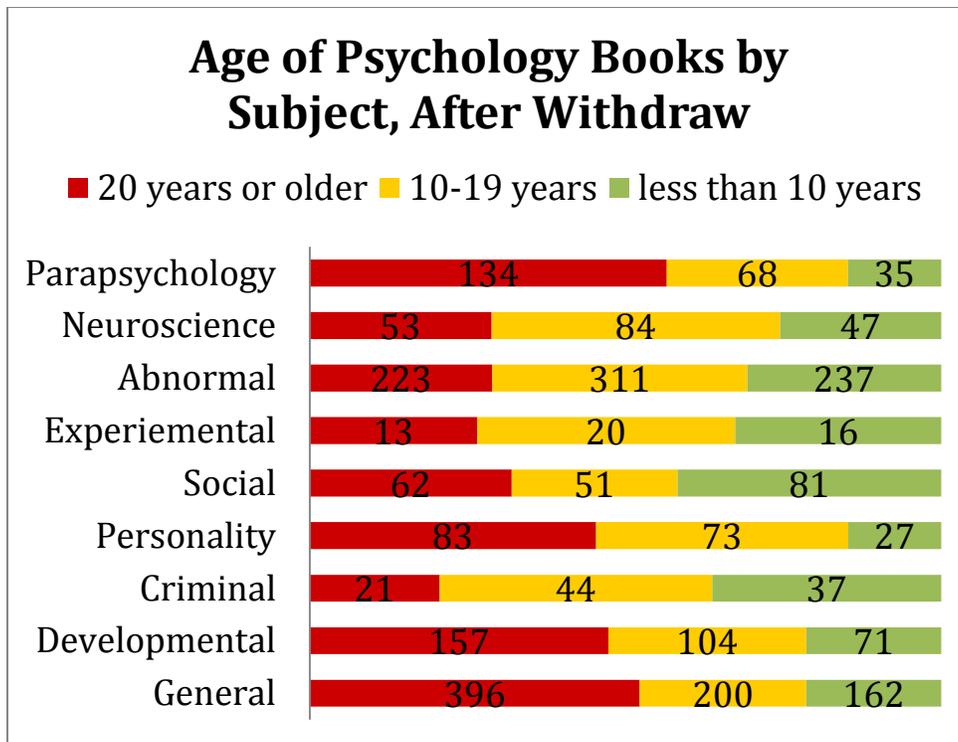| Subject	20 years or older	10-19 years	less than 10 years
Parapsychology	134	68	35
Neuroscience	53	84	47
Abnormal	223	311	237
Experiemental	13	20	16
Social	62	51	81
Personality	83	73	27
Criminal	21	44	37
Developmental	157	104	71
General	396	200	162

Figure 2. And after weeding

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