Weeding or Rightsizing? Why Not Collection Adjustment?

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ABSTRACT Almost twenty years into the 21st century, libraries are under more pressure than ever to maximize use of their physical spaces, often through reduction in the size of print collections to allow for more study and collaborative user spaces. Print reduction is a balancing act of thoughtful review and stakeholder input, with assessment strictly by title circulation or book condition no longer acceptable in many academic environments. This session examines a new way of thinking about book and journal footprints in the library. What are the tools librarians can adopt to justify retaining current titles and housing future volumes? How do we involve stakeholders so that we see each other as partners with a common goal? What kind of workflow and time does this investment in adjusting the collection require and can it be scaled? This paper will examine these issues and offer practical advice from her professional background and experiences in adjusting a collection size based on renovation needs.

BACKGROUND

Copley Library is the University of San Diego's undergraduate library. The full time enrollment is 8,900 students, which includes undergraduate, graduate, and law school students. Copley library owns half a million monographic volumes and almost 3,000 print serials. The decision to review the collection from a different perspective started when the library obtained funding to renovate the building.

With the new renovation, the library is not getting additional space for collaborative spaces or the current collection. Therefore, only a portion of the collection will return to campus. USD is working with Iron Mountain, a secure storage company, for the removal and storage

of most of the library's print collection, both monographs and journals. With such a short time frame, The Head of Collections, Access, and Discovery and I needed to come up with an efficient plan to evaluate the entire print collection.

The idea of weeding is often met with politics and anxiety, both from librarians and the users. However the approach we went for, collection adjustment, encouraged us to be more thorough and more articulate, in hopes that it would lessen user concerns about our management of our collections. We knew it was possible by identifying, compiling, and manipulating robust data about the collection using a variety of tools that many libraries already have access to.

WHY COLLECTION ADJUSTMENT?

Oftentimes librarians are focused on an end goal that creates a smaller footprint for collections and repurposed library space that includes weeding material. However, it may also be done for reasons that require more than a simplistic approach of just weeding material, including:

- Looking for offsite storage for some or most of the collection (e.g., self-owned storage or a third-party storage company)
- Working through large-scale collection withdrawals as part of merging collections across satellite libraries within an institution and/or affiliation
- Replacing print with non-print format
- Participating in resource-sharing arrangements (e.g., shared print programs, consortial sharing)
- Reviewing online overlap with print serials and print monograph series
- Budgeting for on-demand programs for articles (e.g., Get it Now)
- Requesting funds for vendor deposit accounts (pay-per-article or streaming media)
- Cancelling subscriptions and using interlibrary loan for seldom-used journals
- Joining journal archiving consortiums (e.g., WEST Western Regional Storage Trust, Rosemont Shared Print Alliance, Center for Research Libraries)

The trigger for collection review may include resource-sharing arrangements and perpetual access to individual or packages of e-content rather than a more holistic review of each title. The need to adjust the size of the collection may include more than print books and journals; it can also include audiovisual material, government documents, microform, and even electronic resources. Frequently, you may have to move huge elements of the physical collection offsite. These large-scale efforts are frequently triggered by re-use of the space, either for more user collaboration or for another entity, like a lab or offices, etc., and are often at the command of those outside the library. It is not that none of these events have ever come up before now, but the amount of data and tools to manipulate it that are now available makes today's efforts seem much more multi-dimensional.

Sensible collection adjustment is feasible, regardless of project size, as long as the right steps are taken. First the library must thoroughly consider the kinds of data that are meaningful, not just to withdraw or relocate material, but more importantly in retaining material. If the approach of the project is as a proactive, comprehensive discussion with campus stakeholders of the specific plan to retain specific material and the reasons behind it, perhaps it will provide additional support for materials that are moving off-site or withdrawing permanently. Collection adjustment requires those who perform it to become well-versed with the kinds of data available and also with the tools that help manipulate the data. Frequently these tools also allow access to the manipulated data in forms that are digestible for collaboration.

TOOLS AND DATA TO CONSIDER

We frequently extract a lot of data as part of our normal duties, especially from Sierra, our integrated library system (ILS), so we used Excel extensively as a moderately informed user. We found it to be the most robust spreadsheet application for manipulating data.

However, our institution is a Google campus, so we started making extensive use of Google Sheets for sharing results of data extraction and review specifically for the collection adjustment process. It works much better as a collaboration platform within spreadsheet software because Google Sheets are live documents and there is no need to

worry about having multiple versions of a particular spreadsheet that is being updated by various librarians.

Since the majority of the reference librarians at Copley rely on the online catalog, they find it helpful if they are able to link out quickly to the resource they are evaluating. A title can be hyperlinked directly to the library online catalog on the spreadsheet. Each tab of the Google Sheet can be locked, so only specific librarians that have permission can modify, add, or remove information from that locked tab. For example, if five librarians are working on the same project and reviewing the collection in their subject area, they can work on the same spreadsheet using their specific locked tab. The only caveat is that anyone who has access to the spreadsheet can look at every tab, regardless of whether or not they are locked.

One giant project that was completed recently was the JSTOR reclamation project, also known as weeding the print JSTOR journals. Copley Library purchased the entire JSTOR Arts & Sciences Collections late last year and with the renovation around the corner, it was the perfect time to take advantage and withdraw print titles that are covered through the JSTOR archive. I created a really large Google sheet and divided it up by liaison subject areas through locked tabs (12 liaisons). I extracted information from the ILS along with what we have available through JSTOR and I combined it so that liaisons can identify the overlap. The library faculty collaborated on ensuring faculty on campus were aware of this project and reached out to their faculty to let them know about this project and what it entails. The library was able to weed most of the JSTOR print collection, but there were a couple faculty members who were keen on keeping a few titles and the library wanted to ensure that faculty know their voices are heard.

Copley Library was also very fortunate to use the GreenGlass software that was acquired through the SCELC shared print project Copley participates in. GreenGlass ingested the library's data which included all of our monographs, number of checkouts, and other pertinent information from the ILS. Librarians are able to pull useful information such as:

- Duplicate checks
- If titles or collection of titles are available in HathiTrust's public domain

- If titles or collections of titles are available in other libraries in California and across the United States and how many are actually circulating

This helped liaisons determine whether a book is worth holding onto.

We also relied heavily on vendors and publishers for relevant information. Many vendors offer a free service where a library provides the vendor a list of owned print titles along with their ISBNs. The vendors are able to identify titles available for purchase as e-collections or separately. They sometimes offer special deals if a library is able to reach a certain spending threshold. Additionally, libraries will more likely have print and online overlap in their collection. Some institutions strongly believe that print shouldn't be weeded without some form of perpetual access due to ILL restrictions or resource-sharing limitations, so it is crucial to review publisher licenses and contracts whenever possible.

Going with collection adjustment, which in turn is an investigative approach, helps libraries understand how to start reviewing their collection. Finding meaningful data and its purpose will really identify the collections' strengths and weaknesses.

FUTURE CONSIDERATIONS

With a large portion of collection remaining off-site after the renovation is complete, there are still some obstacles that Copley Library will need to tackle in order to maintain and continue the quest for collection adjustment as a best practice. However, the last few months pre-renovation taught us that time may not always be on our side and there will be concurrent ideas and different interests, but the data that is pulled and manipulated will always provide a strong argument for efforts made by the library. We plan to continue to gather data to support materials that should be brought back to campus after the renovation and make a case for material that should stay in off-site storage and not be withdrawn.