Into the Weeds: High-Volume Collection Weeding Practices at a University Health Sciences Library

Dr. Michael Johnson[1]*, Dr. Emily Carter[1], Dr. Sarah Thompson[2], Dr. David Williams[2], Dr. Laura Bennett[3], Dr. James Miller[3]

[1]Texas Tech University Health Sciences Center, Medical Library and Information Sciences Division, Lubbock, USA

Abstract:

As print usage continues to shrink while the demand for student space grows, many academic libraries have felt the pressure to weed more aggressively. While not a new trend, much of the discussion surrounding weeding draws on the implicit assumption of some occasional weeding as collection maintenance. This article describes an aggressive weeding project at the Texas Tech University Health Sciences Center's Preston Smith Library, which had previously adhered to a no-weeding policy. It outlines the library's development of criteria and methods where none had previously existed as well as the challenges encountered and the outcomes achieved.

Introduction

The Preston Smith Library (PSL) at the Texas Tech University Health Sciences Center is nearing completion of its first major weeding project in decades. While many libraries perform some weeding on a regular basis as part of collection development, the PSL had been operating under a no-weeding policy for several years. This decision stemmed from a myriad of factors, predominantly a desire to maintain a large research collection and uncertainties about institutional restrictions on disposal of state-funded materials. Additionally, the increasing demand for and utilization of electronic resources meant that print monographs and journals were receiving increasingly less attention. As few print materials were being added to the collection and space did not appear to pose a concern, the no-weeding policy remained in place and largely unchallenged. However, these priorities shifted when the library was informed about an upcoming renovation to the campus and to the library. As one of the goals for the library was to create as much space as possible for students to study and collaborate, the technical services librarians were asked to weed the vast majority of the print collection in order to make room for these spaces. Due to the library's lack of precedent for weeding, this created a multi-pronged challenge of establishing criteria and procedures, mobilizing available staff and resources, and getting the project completed in time for the renovation.

Literature Review

There has been no shortage of scholarly discussion on weeding, particularly in recent years as libraries feel increased pressure to provide digital resources and study and collaborative space. Despite the general acceptance in librarianship of weeding as a necessary practice, the PSL is not

alone in having practiced this activity regularly. Held (2017) provides a sound overview of weeding as a professional practice that is often neglected or placed on the back burner for a myriad of reasons. Those reasons vary tremendously by institution, collection and situation, but one common trend is that weeding is often brought back into the forefront by an impending construction or renovation project.

The PSL was far from alone in having its weeding project brought about by changes in the library's allocated space due to renovation or restructuring, and was also not alone in having several unknowns about the timeframe and details of that restructuring. Miller (2016) describes a weeding project at the Santa Rosa Junior College Libraries in which librarians and staff were tasked with identifying titles for weeding to make room for a learning commons space for which funding was not guaranteed. In that scenario, the librarians and staff had to be prepared to conduct the weeding project within a very short time period if funding was approved, while also keeping the collection intact until it could be guaranteed. Similarly, Arbeeny (2014) describes a situation at Fort Lewis College in which librarians were asked to identify a list of titles to weed due to a reallocation of library collection space to other campus organizations. Although these projects were substantially smaller in scale (10,000 titles to be evaluated at Santa Rosa and 4,000-5,000 to be weeded at Fort Lewis, as compared to over 190,000 titles at the PSL), they demonstrate some of the difficulties faced when libraries are tasked with heavy weeding on a tight or in-flux time frame. Acadia (2015) describes a large weeding project at the University of Texas (UT) at Tyler that came closer in scale to that at the PSL, but even here the percentage of items to be weeded was lower: 50%, as opposed to the 72% weeded so far at the PSL. Additionally, the project at UT Tyler differed in that its administration chose to participate in a joint resource-sharing facility, which led to very different steps and procedures than the PSL's project, in which the discarded books were slated for recycling and repurposing.

The differences in constraints, expectations and goals between these weeding projects in turn create a great deal of variety in how each institution will handle the process, from creating procedures to delegating the work, to overcoming obstacles that arise. As McHale (2017) states, one major challenge lies in striking a balance between automatic deselection based on ILS data and professional judgment from live, human librarians. In the scenario faced at the PSL, the time constraints and relatively small number of staff prompted the technical services librarians to optimize data collection from the library's ILS in order to reduce the amount of staff time spent evaluating every book. The librarians ultimately used a process similar to the one described by Arbeeny (2014), in which the Fort Lewis College librarians utilized very deliberate keyword searches to identify items that should be kept rather than items that should be discarded.

There has been a great deal of discussion on how to evaluate items for discarding. Slote (1997) outlines best practices for weeding in academic libraries, although not specifically medical libraries. In addition to old age, these criteria include poor physical condition, poor content, duplicate materials, and little or no circulation. The age of the items is particularly relevant in medical library collections; Tobia (2002) points out that retaining materials with dated or inaccurate materials could have serious consequences for medical library patrons. Johnson (2004) makes a strong case for balancing objective metrics like circulation counts with

subjective judgment such as local relevance, and reminds evaluators that there is rarely a one-size-fits all, as different libraries serve different patron populations and different patron needs.

Many libraries have used overlapping electronic access as a main criteria for weeding, but even then, this is rarely simple or quick to determine. Lingle (2009) describes some of the intricacies of identifying collection overlap between print and electronic resources, particularly with journals. Griffin and Foret (2011) explore this even further, and delve into questions regarding the reliability of different kinds of access where journals are concerned. Additionally, Carey (2014) points out that despite the popularity of electronic resources, there are risks and difficulties in utilizing them in a core collection, particularly where technical issues and digital rights management are concerned.

In addition to the difficulties in determining what to weed and what methodology to use, some have explored the logistics of an extremely important library asset: its staff. Lynd (2015) thoroughly explores the idea that library staff are more likely to be engaged in the process when clear goals and workflows are established, as well as proper controls for potential health and safety issues. Similarly, Soma and Sjoberg (2010) describe a weeding project at Concordia College's Carl B. Ylvisaker Library, in which the librarians took a particularly collaborative approach by combining staff camaraderie and skill sets with librarian and faculty knowledge of the collection. They sought input from all involved staff members, made heavy use of teamwork, and used rewards as incentives, and the project included a thorough pilot test stage. Although this project focused on a more moderate level of weeding (15%) over a much longer time frame of eight years, the authors make a number of strong points on the importance of buy-in from librarians and staff throughout the library.

Methods and results

In beginning the weeding project at the PSL, the first challenge was determining the keep criteria to be used. The initial guidelines given by administration were rather broad: technical services librarians were instructed to keep anything that was older than 1917, locally relevant, or "of particular interest to faculty or staff." The librarians had extensive discussions with administration to clarify these criteria. Questions included how broad of a geographical area should be considered "local," and how the evaluators should define or measure "interest." The librarians encouraged administration to allow the inclusion of other criteria that had not been previously addressed, such as circulation history and overlapping electronic access. These two criteria would go on to play major roles in the evaluation of monographs, and overlapping electronic access ultimately became the predominant metric for evaluating serials.

Once the criteria had been established, the PSL librarians turned to the next hurdle: determining how to collect the necessary data and use it effectively. The technical services librarians were originally encouraged to physically evaluate each item by hand against each piece of criteria. However, the department was also under pressure to complete the project in a timeframe that would be compatible with the (often shifting) target dates of the renovation. The librarians ultimately decided on a compromise: they would run reports in PSL's integrated library system (Koha) that included as much information on as many pieces of criteria as possible. The end

result was a spreadsheet with columns for call number, item number, biblio number, barcode, copy number, ISBN, last checkout date, publication date, title, subtitle, author, place of publication, item notes, title statement, publication notes, public notes, and whether or not the record included an eBook. Using a combination of digital sorting and human judgment, the technical services librarians sorted all General Collection monographs into three categories: "Keep," "Weed," and "Investigate," with "Investigate" serving as a catch-all category for items that would need to be given a closer look electronically and physically. The serials librarian created a similar system specifically for serials, focusing primarily on electronic overlap. The final weeding tool for serials included journal title, ISSN, biblio number, the years of holdings held by Lubbock, the years of holdings held electronically, the overlap years to be withdrawn, and the years to be kept in print.

As the technical services librarians pulled together the raw data needed for the project, they also ironed out the details of the procedures that would be needed for each step. While individual items had occasionally been withdrawn due to damage, this was rare enough that there were no written instructions for it. Due to the size and scope of this project and the varying levels of experience of the staff members involved, the librarians wanted to have clear, straightforward instructions that would help minimize confusion and standardize the process. By doing a test phase and making note of actions taken, situations encountered and problems found, the librarians created procedures for evaluating the items electronically using the report-generated spreadsheet, for editing items within Koha to reflect their withdrawn status, for removing OCLC holdings to minimize negative repercussions for ILL, for physically withdrawing the items, and for sorting the discarded items to determine whether they were to be donated or recycled. As the librarians had been tasked with creating a timeline for when the work would be completed, there was also the matter of estimating rough time durations for each process, which often varied depending on the individual and on the situation.

Even with careful procedures in place for every step, staff training and management was a major part of the process, and arguably the most time consuming one. Due to the size of this project, the technical services librarians recruited staff from every area of their department as well as hiring on four student assistants and engaging some staff and student assistants from public services on certain tasks. As a result, the workforce ranged from librarians who specialized in cataloging and serials to student assistants with no previous library experience. The librarians made a strong effort to delegate tasks according to each person's knowledge and skill levels, and to customize instructions as needed. Even so, there were situations in which mistakes and misunderstandings occurred, but these were treated as learning experiences for everyone involved. The librarians made an effort to minimize these misunderstandings by paying close attention to detail in creating the procedures, by investing time into training staff in both group and individual settings, and by encouraging all staff to feel comfortable asking for help or clarification.

Another aspect the librarians have struggled with has been allocating staff time and energy. With a project of this size and scope, some of the tasks were by nature physically demanding, especially for staff who were performing that task often or for a large chunk of their workday. All of the PSL librarian and staff job descriptions included some restrictions on the amount of physical activities such as standing, stooping, pushing carts, etc.; restrictions that were put in

place without any anticipation of a project of this scale. Additionally, some of the staff had health considerations that could have put them at higher risk of injury. The librarians were able to compensate for this in part with the help of the student assistants, most of whom were brought on specifically for this project and were well-aware of and accepting of the physical work involved. For everyone working on the project regardless of title or job description, the librarians strived toward delegating a mix of physically active and more sedentary duties, and attempted to ensure that all workers felt comfortable speaking up about any possible health concerns. They also took steps to ensure access to safe, good quality equipment, from sturdy, dependable carts to disposable gloves and face masks for those who wanted them. The librarians also tried to make the delegation of work as fair as possible and to be actively involved in those tasks alongside the staff and student assistants.

In addition to navigating these issues, the librarians spent a large amount of time and energy addressing the concern of what to do with all the materials selected for weeding. They were originally told that the institution required any items purchased with state funds to be discarded as trash in order to avoid any risk of the items being resold or used in any way for financial gain. However, when the librarians attempted to find more information on this in the institution's operating policies, they were unable to find anything to support that verbal directive. They met with the institution's General Services department, who recommended that the library make a good faith effort to recycle as much as possible. The library found a local recycling company and had an arrangement in which the company would drop off large cardboard boxes, wait for library staff to fill them with discarded books, and then take the boxes to a third party that would break down the books into a more readily recyclable form. This arrangement lasted for several months, but there were issues with communication and coordinating the pickups. Ultimately the company and its subcontractors were unable to keep up with the library's pace and volume, and did not respond to the library's efforts to find a solution. With no other local options available for recycling, the librarians worked out a new arrangement using a combination of Better World Books and local garbage disposal. The library donated as many items to Better World Books as possible, with anything that the company did not accept going into a dumpster specifically rented for the project. This process was more time-consuming than the recycling arrangement, as it involved separating out the monographs that met Better World Books' criteria for acceptance from those materials that did not, and it involved packing, palletizing and shrink-wrapping the books in a particular way. However, aside from some occasional issues with coordinating pickup of materials, this combined approach proved to be more reliable than the previous arrangement.

Conclusion

The weeding project at the PSL is still a work in progress, but the librarians and staff are pleased to say that the end is in sight. As of December 6th, the library has weeded 137,416 items; 75,587 monographs and 61,829 serials. The physical portion of the monograph weeding has been completed and the serials portion is not far behind. As time and budget allow, PSL's senior technical services librarians have been working to identify titles and years for which digital backfiles are available for purchase, after which point the print volumes of those titles and years can be withdrawn.

Although the bulk of the physical weeding has been completed, work remains to be done. The most obvious of the remaining tasks is dismantling and removing the empty shelving. The library

was able to get an estimate for how much time and money this would cost, but this decision is still pending further consideration from administration. In the meantime, technical services librarians and staff have been working on a mix of physical projects, such as shifting the remaining journals to free up unneeded shelving, and digital projects, such as removing OCLC holdings for which no physical copies remain in order to minimize confusion on ILL requests. Additionally, some staff are working on suppressing catalog records for which no print copies remain in order to minimize frustration for patrons.

Despite these remaining tasks, the librarians and staff are pleased to have the most physical aspects of the project completed. It has been very much a learning experience to undertake a project of this size and scope without an institutional precedent, but the librarians and staff of the PSL hope that their experiences may be of use to other libraries in similar situations.

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