Liaison Librarian

June 2010

Reducing the Reference Collection by 75% in 75 Days: Can it be Done?

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Jeannie An, Nora Gaskin, Wade Wyckoff

Mills Library, McMaster University

Reference collections: current trends

Jeannie An

Current Trends

- Related to collection development
- Flat budgets
- Space for students, collaborative study, silent study, collaborative initiatives

Current Trends

- Decline of physical use of collections (Martell, C. (2008). The absent user: Physical use of academic library collections and services continues to decline 1995–2006. *The Journal of Academic Librarianship, 34*(5), 400-407)

- Reference tools now available electronically

Current Trends

- Attended ALA 2008 and lots of collection related topics
  - Significant weeding of ref collections
  - Moving entire ref collections to circulating
  - Getting rid of ref collections altogether
  - Shift to e-reference

@ McMaster

- Weeding done but not systematically
- No formalized structure
- Developed a team to begin formal process in Sept 2009

Weeding Procedures

Nora Gaskin

The Goal

- reduce Mills and Thode reference collections by 75% in shelf feet, overall
    - e.g. in Mills 1357 shelves would be reduced to 339
- ...*without* adding to bookstacks!

Project Managers

- research best practices & write procedures & guidelines

- write Communication Plan

- ensure project participants & wider community are informed

- set up project blog

Starting Point

- "Red, Yellow, Green: A Simple System for Collaborative Review of a Reference Collection"
- poster session @ ACRL 2009
- Theresa Arndt, Maureen O'Brien Dermott & Amelia Brunskill, Dickinson College, Carlisle, PA

Red, Yellow, Green:
A Simple System for Collaborative Review of a Reference Collection

Theresa Arndt, Maureen O'Brien Dermott & Amelia Brunskill. Dickinson College, Carlisle, PA.

Introduction

Our 12,000 title print reference collection was long overdue for review.

Without librarian subject experts for every discipline, we needed a collaborative review system to take advantage of collective knowledge and assure everyone had input.

We also needed an efficient system for completing the weeding and shifting within a small window of relatively slow activity in our academic year cycle.

Methods

Our project plan incorporated individual and collective responsibility and accountability.

A spreadsheet by call number was created to track assignments & progress. Individual librarians were assigned to do a first review of each section and flag items using a simple color-coded system.

The flags were:
RED = withdraw
YELLOW = further research on title
GREEN = send to circulating stacks
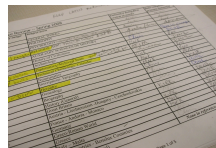
Flagged items were brought to our office area for review by all librarians within two work days. Any librarian could override the initial flag by simply re-flagging. If even one librarian wished to keep an item, it would remain in the collection. An acquisitions staffer researched items flagged yellow to check for more recent editions or online equivalents.

Timeline

April 5th:
Plan in place; start of review

By May 12th:
Liaison librarians complete review of the entire reference collection

May 13th through early June:
Project managers assess for any gaps in completion of project
Assign areas needing further review
Research conducted on "yellow" items

Mid to late June: Shifting of reference collection begins
Mid August: Shifting completed and empty shelves removed

Results

• Entire reference collection reviewed in just 2 months
• Collection size reduced 30% (12K to 8500 titles)
• One third of stack ranges removed
• Space gained for public computers and exhibit space
• Quality of collection improved
• Reference librarians gained familiarity with reference collection
• Teamwork fostered across library units
• Practical, replicable process for collection review

Lessons Learned

• Assign project manager(s)
• Incorporate individual accountability
• Have a simple, clear workflow
• Set interim and overall deadlines
• Keep records of progress
• Communicate to the campus
• Celebrate your success!

Liaison Librarians

1. calculate current shelf feet in LC areas

2. 75% of that is the goal for weeding, overall (can vary within areas)

Liaison Librarians

3. scan shelves

4. affix appropriate coloured Post-it flag to each title/first volume of each title

Flags

- **green**: keep in reference
- **yellow**: further research needed
- **red**: withdraw from collection
- **blue**: move to stacks

Documentation & Communication

- record decision for each title in Excel spreadsheet

- email spreadsheet to reference staff

- allow one week for feedback

"Keep in reference" & "Further research needed"

- co-op students check for
  - **newer** editions
  - **electronic** versions
    - owned or available for purchase
    - verify **stability** of online versions

"Further research needed"

- co-op students check:
  - holdings/locations/newer editions in other Ontario libraries using **WorldCat** and/or **RACER**
  - The New **Walford** Guide to Reference Resources

"Keep in reference" & "Further research needed"

- co-op students report back to liaison librarian
- final decision

"Withdraw from collection" & "Move to stacks"

- student assistants take to tech services for withdrawal or processing

Follow-up

- liaisons verify a 75% reduction overall
- for each shelf foot moved to stacks, withdraw a shelf foot from stacks

Communication Plan

- target audience: project participants, faculty, other library users

- message: what's happening, why, when and how

Communication Methods

Stakeholder Group	Communication approach/activity	Person Responsible	When (date)	Done (check)
Faculty library liaisons	Email from liaison librarian	liaison librarians		
All other users	Library news item	Catherine Baird		

Tools, guidelines & criteria

Wade Wyckoff

Guidelines

- Has to be a true "weed" not a "relocate"

- Do we need:
  - Superseded directories?
  - Travel guides?
  - Multiple dictionaries?

- Weed from stacks, too

Guidelines

- Consider standing orders
  - Do we need copies in multiple libraries?
  - Do we need all of them?
  - Should we be getting these sources in print?

Guidelines

- Heretical thoughts:
  - In the age of Google, are some of our tools needed?
  - Are loose-leaf sources worth the hassle?

Criteria

- All the usual suspects
  - Outdated/Inaccurate?
  - Newer edition?
  - No longer relevant?
  - Available online?
  - Other copies elsewhere?

Tools

- Excel
- Reference bibliographies
- Catalogues
  - Local
  - Consortial (RACER)
  - WorldCat
- Vendor sites

Lessons Learned

- Include project participants in communication plan

- Get started and build momentum

- Think about when to weed

Links & Contacts

Project blog
http://weeding.blog.lib.mcmaster.ca/

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