

Rightsizing the Academic Library Collection

Suzanne M. Ward
Collections Strategist
Purdue University Libraries
West Lafayette, IN

Outline

- **Understanding the past ...**
 - Past collection development practices
 - Use studies in academic libraries
 - Crowded shelves & traditional solutions
- **... to manage the present**
 - Rightsizing
 - Definition, challenges, action
- **Q & A**

“... we have plenty of time before we are faced with the problem of maximum size. But eventually that day will come.”

~ Howard F. McGaw (1956)



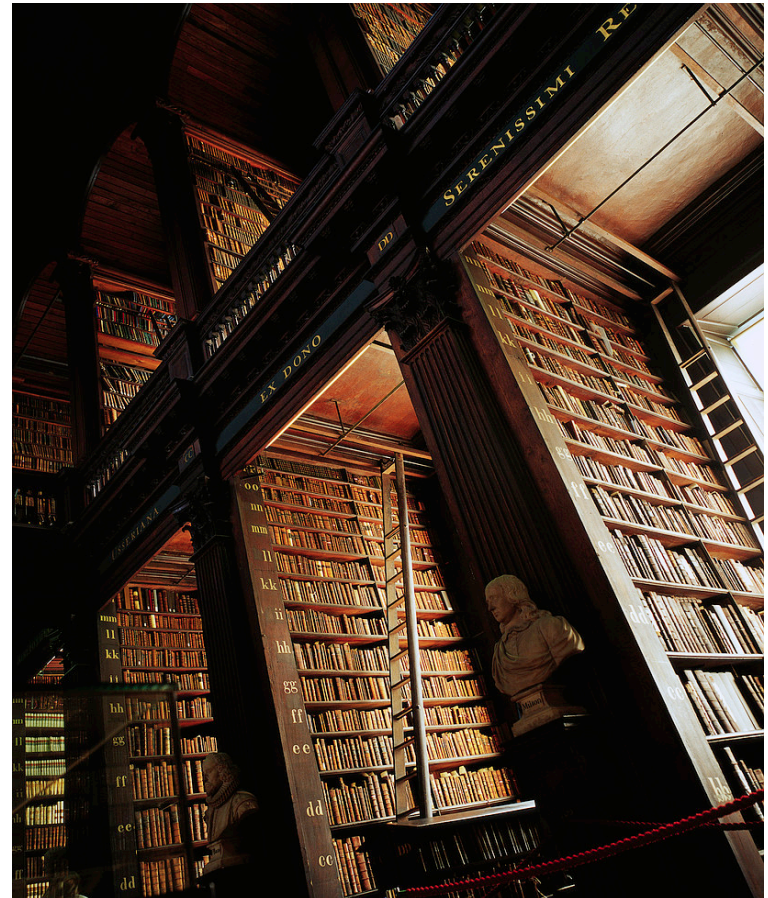
That day is upon us!



How did this happen?

Traditional collection development

- Availability window
- One major format
- No or slow ILL
- Just in case



The unspoken assumption

We must keep everything . . .

- In case somebody wants it
- Because we acquired it
- Because we are an academic library



However

“There isn’t room to
shelve one more book!”





Space vs. Use



How do patrons use library spaces?





How are patrons using the physical collection?



- What do they use?
- How do they use it?
- Where do they use it?
- How much do they use?



- How much is seldom or never used? What is this material?

Why don't patrons use some books?

- **A.** used till they fall apart
- **B.** Used when new
 - Interests change
 - Outdated
 - Newer titles better
- **C.** Never / seldom used
 - The “wrong” books





Use studies

“Some behavioral patterns of library users: The 80/20 rule.”

~ *Richard Trueswell, 1969*

20% of the books account for 80% of the use.



The “long tail”

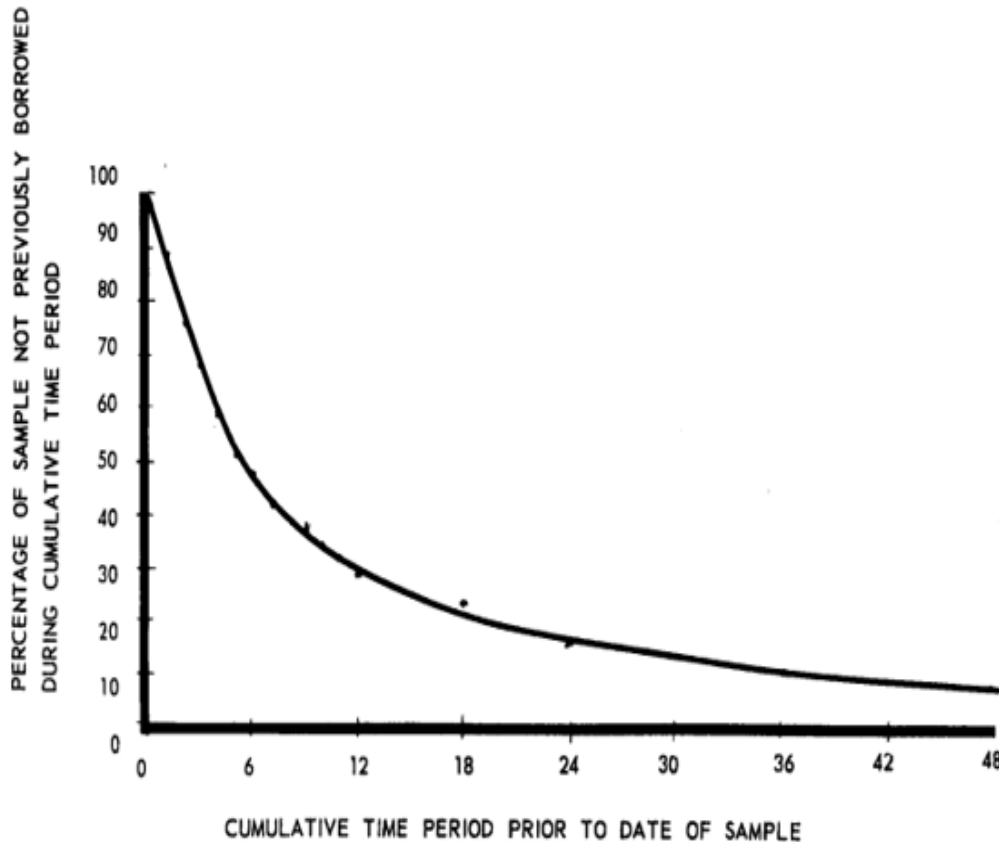


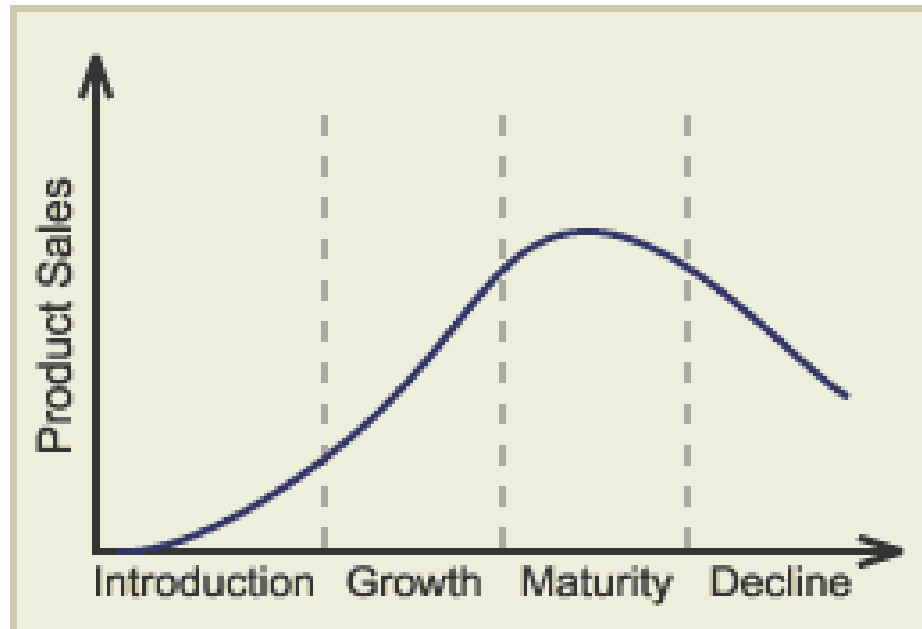
FIG. 1. Last Circulation Date Analysis (Deering Library).

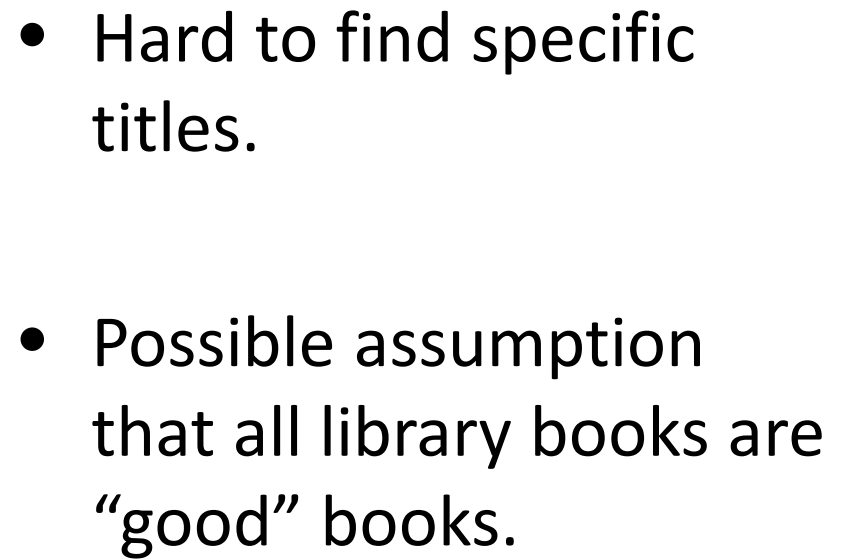
- Patrons use a few books a lot
- Patrons use many books occasionally
- Patrons never or seldom use some books
- 30%-50% of books *never* used



Life cycle

Product Life Cycle Diagram





Impact of e-resources



- Quality varies
- Quick check vs. deep reading
- Disciplinary differences
- Coverage depth & breadth
- Different platforms
- DRM restrictions
- ***Result:*** hybrid collections

So ... what can we do?

- Crowded shelves.
- Thousands of no-use & low-use books.
- Some electronic equivalents (mainly journals)



Traditional solution #1

Find/create more space elsewhere

- Attics
- Basements
- Storage facilities
- Warehouses



Guess what?

We're all storing the ***SAME*** outdated,
low-use/no-use books!



Traditional solution #2

Weeding





Weeding challenges

- Band-aid approach / crisis management
- Low-hanging fruit approach = “safe” choices
- Unevenly applied
- Few variables considered
- No coordination with partner libraries



Rightsizing ...

... is the strategic, thoughtful, balanced, and planned process whereby librarians shape the collection by taking into account factors such as:

- *Disciplinary differences*
- *Impact of electronic resources*
- *Local program strengths*
- *Previous use (circ stats)*
- *Partners' holdings*

Rightsizing advantages

- Considers entire collection
- Rules-based de-selection
- Automate as much as possible
- Ongoing part of routine collection management
- Compare local collection to partners' holdings
- *Core value*: enhance the user experience

Impetus for rightsizing

- #1. **Internal**: Librarians acknowledge that something must be done. = time to plan a thoughtful, strategic approach
- #2. **External**: Outside circumstances dictate action = strategic triage



Emotional response #1

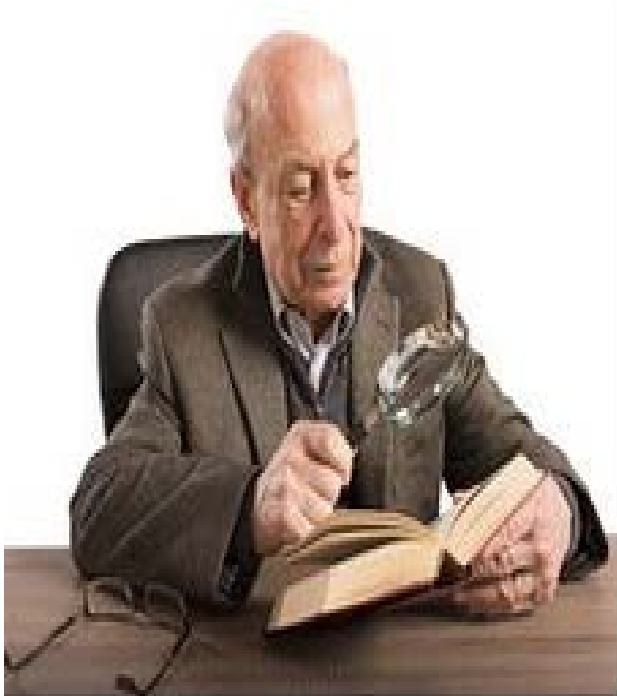


Books as sacred objects





Emotional response #2



*“I spent my career
building this collection!”*



Emotional response #3

“We spent millions of dollars buying these books and journals.”





Emotional response #4

“The faculty in my liaison department will be furious and will blame me.”





Emotional response #5



- Quantity = quality
- More is “better.”



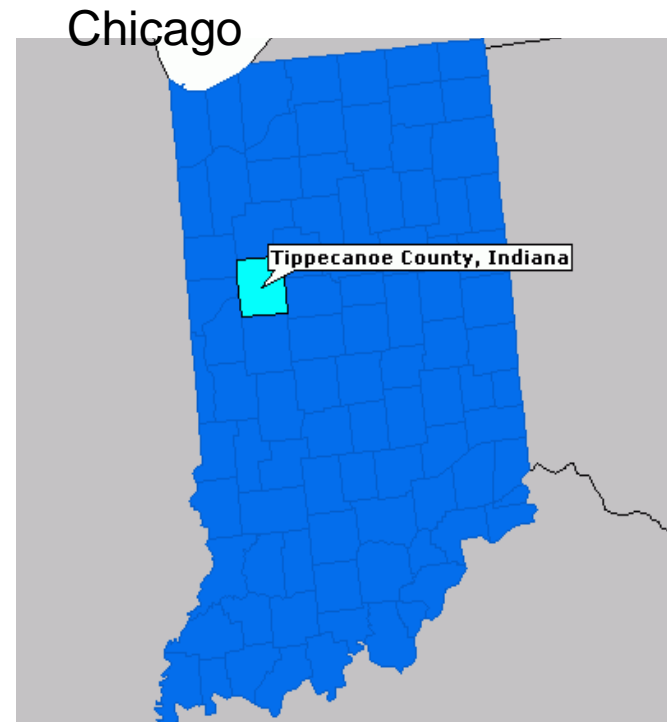
Managing the emotions



- New environment
 - Patron needs
 - Use of space
 - New formats
 - Digital world
- Applying professional skills to de-selection
- Withdrawing items highly duplicated elsewhere

Rightsizing management

Purdue University



Key components for success

- Administrative support
- Manager
- Employee buy-in
- Communications plan
- Milestones
- Iterative
- Collaborative approach





Policies & Plans

- Withdrawal policy
- Communications plan
- Rightsizing plan
 - Rules-based mass withdrawals (books)
 - Withdrawals against electronic holdings
 - Short runs
 - Collaborative endeavors





Choose your approach

- Go solo
- Joint storage facility
- Distributed print retention
- Combination?



“Keeper” libraries

- Top research libraries
- Regional/national resource
- High density storage
- Mission, staff & budget to retain items
- Collection against which other libraries *withdraw & supplement*





Planning phase



- Time constraints?
 - Books or journals first?
 - Multiple locations?
 - Consultant?
 - Costs?
 - Special considerations?
 - Identify partners?
-
- *Be strategic*



What to keep?

- *Journals*

- No e-equivalent (usually)
- Scarce titles



- *Books*

- Own institution's publications
- Collections of distinction
- Titles of regional interest
- Certain gift books
- Special collections titles
- Scarce titles
- Withdrawal criteria



Journals or books first?

- Journals
 - Electronic equivalents
 - No content is lost
 - Recover lots of shelf space
 - Users unconcerned
 - Bib record challenges
 - List development
 - Few exceptions
- Books
 - Check partner holdings
 - Circulation records
 - List development
 - Removing content
 - User concerns
 - Managing exceptions

Withdrawal criteria: books



Setting Thresholds

- Publication date cutoff
- Number of circulations within the last X years
- Holdings elsewhere:
 - State
 - Region / consortium
 - Country

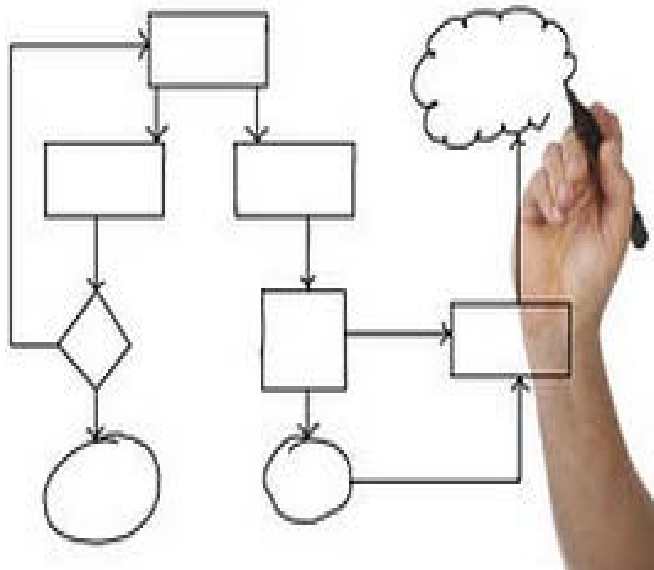
Know before you start ...

- Material disposal
- Staffing
- Deadlines / timeline
- “untouchable” items
- Supplies
- Reporting requirements
- List generation
- List review requirements
- Procedures / workflow
- Troubleshooting





Test phase



- List development
- List review (optional)
- Pulling items
- Item disposal
- Catalog updates
- Communication channels
- Choke points

List development: journals

Titles	ISSN	Library	Holdings	Proposed Action
Acta polymerica	0323-7648	Engr	v.41(1990)-v.50(1999)	wd all
Advances in agronomy	0065-2113	Life	v.1(1949)-v.102(2009)	wd 1995-2009 only
Advances in applied mechanics	0065-2156	Engr	v.20(1980)-v.42(2008)	wd 1996-2009 only
Advances in carbohydrate chemistry	0096-5332	Life	v.1(1945)-v.23(1968)	wd all
Advances in catalysis	0360-0564	Engr	v.22(1972)-v.51(2007)	wd all
Advances in chemical engineering	0065-2377	Engr	v.1(1956)-v.32(2006)	wd all
Advances in ecological research	0065-2504	Life	v.1(1962)-v.41(2009)	wd 1995-2008 only
Advances in heterocyclic chemistry	0065-2725	Chem	v.26(1980)-v.94(2007)	wd all
Advances in inorganic chemistry	0898-8838	Chem	v.31(1987)-v.59(2007)	wd all
Advances in organometallic chemistry	0065-3055	Chem	v.18(1980)-v.43(1998)	wd all
Advances in polymer technology	0730-6679	Engr	v.11(1991)-v.25(2006)	wd all
Agricultural history	0002-1482	Life	v.1(1927)-v.73(1999)	wd all
AIChE journal	0001-1541	Engr	v.31(1985)-v.54(2008)	wd all
Annals of physics	0003-4916	Phys	v.309(2004)- v.325(2010)	wd all



List development: books

Barcode	Mark X to keep	Title	Publisher	Call Number	Library
32754071761823		Food safety : a reference handbook /	ABC-CLIO	363.192 R248f 2000	life
32754063620698		Directory of germplasm collections.	IBPGR Secretariat	631.523074 lb6 v.1 pt.2 1985	life
32754063452597		Root and tuber crops /	IBPGR	631.523074 lb6 v.2 1986	life
32754063620680		Directory of germplasm collections.	IBPGR	631.523074 lb6 v.3 1990	life
32754063257129		Directory of germplasm collections.	IBPGR Secretariat	631.523074 lb6 v.4 1982	life
32754063694693		Directory of germplasm collections.	IBPGR	631.523074 lb6 v.6 pt.2 1989	life
32754078903816		Forest fires : a reference handbook /	ABC-CLIO	634.9618 Om5f 2005	life
32754064132271		The gardener's directory.	Hanover House	635.9 St45g	life
32754070355460		Sunset western garden book /	Sunset Pub Corp	635.90978 Su74s 2001	life
32754071754620		Storey's guide to raising poultry /	Storey Books	636.5 M536s 2001	life
32754074082888		The low maintenance garden /	Firefly Books	712.6 B459L 2000	life
32754067410278		Fish technology centers : directory.	US Fish and Wildlife Service	I 49.104:F 52	life



Full production

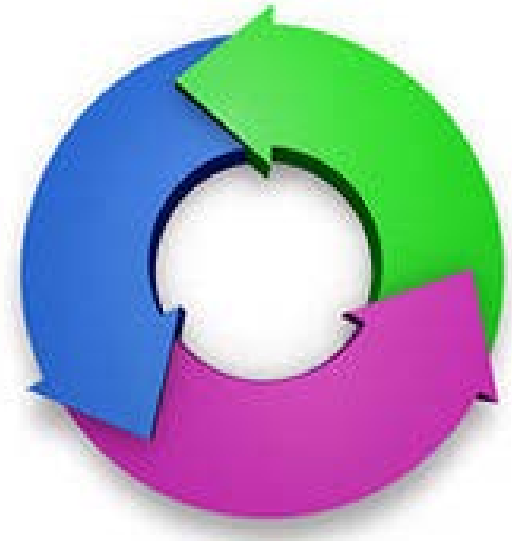


- Training
- Troubleshooting
- Workflow checks
- Milestones & progress reports
- Assessment
- *Party time!*



Rightsizing is ongoing & iterative

- *Books*: set the next date
- *Journals*: when new e-backfiles added
- *Other*: microforms? A/V?
E-resources? Government documents?

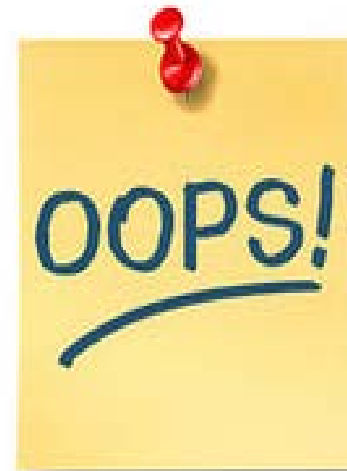


Mistakes are inevitable . . .

. . . but not the end of the world!

These are low-use items widely held elsewhere.

Borrow or buy as needed.





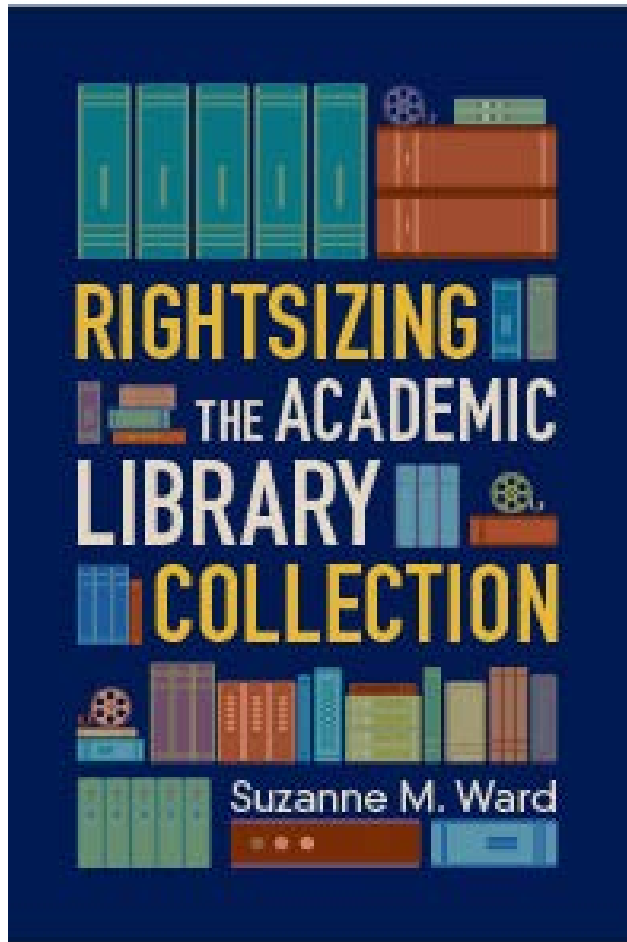
Result

VIBRANT ACTIVE LIBRARY

- new spaces
- new services & equipment
- uncrowded shelves full of relevant titles
- happy patrons



Shameless plug



- American Library Association, 2015.

Questions?

