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Efficient Deselection and Other Stories: A Fellowship at UNC Charlotte

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Abstract

This paper will describe the collection development project done by a summer fellow at the J. Murrey Atkins Library at the University of North Carolina at Charlotte. The project took place over the summer of 2016. The fellow worked with the health sciences librarian and the collection development librarian to assess the health sciences resources held by the library. Elements included compiling acquisition recommendations, surveying faculty and other health sciences librarians, drafting a collection development policy, and recommending titles for deselection. The deselection section also served as a pilot for a larger library-wide project.

Introduction

This paper will describe the collection development project done by a summer fellow at the J. Murrey Atkins Library at the University of North Carolina at Charlotte. The project took place over the summer of 2016. The fellow worked with the health sciences librarian and the collection development librarian to assess the health sciences resources held by the library. Elements included compiling acquisition recommendations, surveying faculty and other health sciences librarians, drafting a collection development policy, and recommending titles for deselection. The deselection section also served as a pilot for a larger library-wide project.

Context

The J. Murrey Atkins Library at the University of North Carolina at Charlotte (UNC Charlotte) serves over 21,000 undergraduates and over 4,000 graduate students. The health sciences materials are part of the general collection. Recent and planned creation of new student and staff workspaces meant less room for shelving; in addition, the collection had not been systematically weeded for some time, so shelves were overfilled. To resolve the issue, a library-wide deselection project was in the planning stages. The health sciences resources were used to develop an effective process for that project.

The Fellowship

In addition to the deselection section, there were a number of different aspects to the fellowship. These covered different areas of assessment for the health sciences collection, from policy to acquisitions to withdrawal.

Collection Development Policy

In consultation with the collection development librarian, the fellow drafted a general collection development policy for the Atkins Library. This was designed to act as a framework for the staff as well as a public document to share with the community. Also created was a draft of a subject-specific policy for the health sciences collection and a template from which other subject policies could be adapted. The concrete guidelines helped keep the rest of the assessment project focused and in keeping with the library's goals. This part of the project was a good example of how the fellowship benefited the library as well as the fellow; the staff had not previously had time to create the documents, and the fellow gained the invaluable experience of drafting real-world policies.

Surveys

One of the goals of the project was to recommend health sciences databases and other electronic resources to add to the collection. With this in mind, it was determined that feedback from other programs would be helpful. Finding out from other health sciences librarians what electronic resources their users preferred would allow UNC Charlotte to make more informed decisions on future purchases. A survey was designed with the purpose of gaining relevant information without requiring too much time and effort to fill out. It was sent out as an e-mail with a link to the Google form; the recipients were librarians from peer or aspirational institutions who were listed in the directories as health sciences specialists of some variety (specifics varied by program).

The second survey was designed to get information from the program's health and human services faculty. This, in combination with the first survey and other tools, would help the subject librarian develop a multifaceted plan for deciding which materials to purchase and which to replace. In recognition of how busy faculty were likely to be in the fall, the survey was as short and easy to fill out as possible.

The two surveys dealt with the same topic (the use of electronic library resources for the health sciences) but looked at it from two different perspectives. Information from peer and aspirational institutions can provide guidance and purchase ideas, while feedback from the program's faculty is essential to understanding how they and their students actually use the resources.

Assessment

The first step in assessing any collection is to know who the users are. In this case, this meant primarily the students, faculty, and staff of the College of Health & Human Services (CHHS) at UNC Charlotte. The collection being part of the main library and the university being public, other community members had access to the materials as well, but there was no simple way to gauge use by people outside of CHHS. The four programs in CHHS were kinesiology, public health, social work, and nursing. The decision was made to focus on nursing first; an assessment procedure would be easier to develop on a smaller scale, and it could then be applied to the other programs. Nursing was a common enough program to allow for comparison with peer institutions. Another benefit was that it had a more specific call number range than some of the other more interdisciplinary programs.

Several methods were considered. One was to assess the collection as it compared to standard core title lists; another was to compare it to peer or aspirational institutions. Both of these approaches had the potential to miss parts of the collection developed to support specific aspects of the program. As the fellowship was a temporary position and the fellow was not familiar with the particular needs of the CHHS and UNC Charlotte, long-term assessment was best left to the health and human services librarian. The surveys described above were designed to help with that process.

Instead of assessing the full collection, the fellow focused on two more easily quantifiable aspects of assessment. The first was purchase recommendations, which could be based on core lists and peer institutions. The second was deselection, which the collection badly needed.

Deselection

The Atkins Library was in the planning stages of a large rightsizing project. The collection had not been methodically weeded in some time, and space was needed for study areas and special collections. The project was limited to print books; serials were going through a separate process, and e-books did not affect the physical space issue in the library.

A pilot system was developed for choosing titles for deselection using the Library of Congress R class, which covers medicine. This was a large enough sample to demonstrate the effectiveness of different methods but not so huge as to be unmanageable. In addition, it included most of the subject areas that the fellow had worked with from the beginning. Health sciences were also easier to work with than some other subject areas might have been because of the importance of currency.

Books in the R class at the Atkins Library came to just over 26,000 titles. The information in the original list included title, author, publisher, edition, publication date, acquisition date, shelving location, genre, call number, holdings, format, number of checkouts, last checkout, Online Computer Library Center (OCLC) number, and barcode. The list was originally sent as an Excel attachment. The size of the file was difficult for some computers to process quickly; one solution was to open it in Google Sheets and do the early filtering there. A smaller list could then be transferred to Excel, where the tools allowed for more complicated data manipulation.

To start, some simple criteria were set to get the easy candidates for deselection out of the way. One set was books where the library owned a duplicate or a more recent edition of the same title. Medical information should always be as current as possible, so outdated versions were prime weeding candidates, as were duplicates with low usage. There ended up being 79 duplicate titles with low circulation; these could be withdrawn immediately with no adverse effect on the collection.

An additional 365 titles were older editions where the library already owned a newer one, and 80 of these had never been checked out and could also be withdrawn immediately. The others should be checked for use. Those with no checkouts after the purchase of the updated edition could be withdrawn, while recent use might indicate that additional current copies should be purchased before the older one is removed.

Another, more complicated set of titles was generated based on age and lack of use. This resulted in over 7,000 records acquired over 10 years ago and never checked out. These were split by publication date into sections of several hundred titles each, which made the project easier to break down and complete in discrete segments. Not everything on the list should be automatically weeded—the subject librarian should go over it, and faculty should be consulted—but the titles are definitely candidates for deselection.

These two sets of records are the lowest of the low-hanging fruit, but a project this large must begin somewhere. Often the scale is intimidating enough to deter potential weeders; breaking down tens of thousands of titles into sets of 80 or a few hundred gives them a place to start. Next steps, depending on the subject area, might include items with low or no recent checkouts. In time-sensitive subjects, titles with older publication dates and recent checkouts might need to be replaced with more current versions. Once the data is available, the sorting and filtering options are multitudinous and can be adapted to suit any subject or collection.

Discussion

Past Work

This project was designed to meet specific needs with practical solutions, but both were relevant to any academic library. The pressure to maintain a current collection in a limited physical space is a typical challenge. While situations vary enough that one method cannot be applied across the board, case studies can be adapted or used as inspiration. Every step of this project relied on the examples set and lessons learned by similar ones. The collection development policy history and outlines laid out by Pickett et al. (2011) helped greatly with the general policy, while McGuigan and White's (2003) work on

subject-specific policies was influential in that area. Ideas for what to include in a policy can be picked and chosen from such articles, where important parts might be overlooked if one were constructing the document in a vacuum.

For the deselection process, case studies were invaluable. Some of the inspiration for the Excel methods came from Arbeeny and Chittenden's (2014) work, though the specifics of their situation were quite different. Soma and Sjoberg (2010) specifically describe some of the things that they would change in future, which saves other librarians from wasting time on similar mistakes. Deselection projects often involve a fair amount of trial and error before the most effective approach is solidified, and reading about what has or has not worked for others allows the whole profession to move forward. It is hoped that this paper will add to the canon and assist future endeavors in the same vein.

Future Work

For the Atkins Library, there are a number of logical next steps that can be based on this project. Two collection development policies, one general and one for health and human services, were completed. The subject template can be used to write policies for all other areas that the library covers; these can be published on the website to create a complete overview of the library's approach to collection development. A message announcing the new policies can be sent out to the community. All of this sets a precedent of transparency and consistency for the public as well as the library staff.

The faculty survey can be dispersed when the autumn semester starts and the recipients have returned to campus. It was written for the health and human services department about electronic resources, but other subject librarians can adapt it to reflect the priorities of their faculty. The other survey, which went out to health sciences librarians at 12 peer institutions, can be sent out to more to get further information. Its questions were less generalizable than the ones on the faculty survey, but other subject librarians can rework them to meet their needs if they want to see what resources other programs find the most valuable. Ideally, the results of the two surveys will add to librarians' understanding of their patrons' needs and how best to meet them.

The deselection aspect of the project is largest and most immediately relevant to the library's goals. As the whole collection needs heavy weeding, an efficient system for doing so will be extremely useful. Some of the methods described above, such as finding duplicate copies and redundant editions with low use, can be directly applied to any subject. Topics with currency needs similar to those in the health sciences can use the system of finding older unused titles. Where currency is not as important a factor, such as in literature or history, slightly different methods may have to be developed to reflect the appropriate priorities. In either case, establishing a precedent of systematic deselection will make a very large project manageable. In addition, the criteria could be applied to e-books. Physical space is not an issue for them, so they often get ignored in deselection projects, but currency and usability of the collection is just as important for electronic resources as for print. Usage statistics may not be generated the same way, so particulars of the methodology would differ, but an organized system could be developed just the same.

More generally, the Atkins Library can use the work to demonstrate the value of the fellowship program as a whole. Next summer's fellows can build on previous projects or start in new areas as necessary. Other institutions can see how UNC Charlotte ran the program and how it benefited the library and the students alike. Almost all libraries have projects that the regular staff does not have time for, and the temporary fellowships set an example of how they might be accomplished.

Conclusion

This project turned out to be an excellent pilot for the upcoming library-wide deselection. In addition, it demonstrated the different stages of assessment. Having a long-term plan is essential to informed collection development. From the collection development policy that guides decisions, through the deselection needed to clear shelf space to the recommendations for new resources, this project provides that overview. The individual parts or the whole system can be drawn from and adapted to suit the needs of a subject area or library.

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