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Carol A. Singer  
*Bowling Green State University*, [singerc@bgsu.edu](mailto:singerc@bgsu.edu)

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# Weeding Gone Wild

## *Planning and Implementing a Review of the Reference Collection*

**Carol A. Singer**

**Carol A. Singer** is Interim Reference Coordinator, Jerome Library, Bowling Green State University, Bowling Green, Ohio. Submitted for review December 27, 2005; revised and accepted for publication July 14, 2006.

*A major review of the reference collection in Bowling Green State University's Jerome Library was made necessary by the decision to incorporate the materials from the reference collection in the science library. The process of planning and implementing this collection review is described, emphasizing how this process has been affected by changes in technology and the demands made by library users. Suggestions that may help ensure a successful review are included.*

**I**t had been five years since a complete review of the reference collection in the William T. Jerome Library at Bowling Green State University (BGSU) had been performed, but other priorities had delayed this chore. Once the decision was made to move the Ogg Science Library reference collection to Jerome Library, weeding both reference collections became a necessity before they were combined. As Pierce points out in his introduction to a *Reference Librarian* special issue on weeding, it is not unusual to delay weeding until a library is confronted with a space shortage.<sup>1</sup>

In addition to identifying obsolete and unused books to be removed from the collection, other objectives were to identify missing titles and volumes, su-

perceded volumes for which the newer edition had not yet been purchased, and titles for which newer comparable materials could be purchased. Pierce explains that this large task is common because "As unplanned collections grow, shelf and seating space shrink, and works with needed information are lost in the clutter of outdated and inappropriate materials crowding the shelves."<sup>2</sup> In a 1982 article, Rettig equates reference collections composed of outdated information to a bibliographic Love Canal.<sup>3</sup> Schlachter notes that the prevalence of obsolete reference sources in library collections had not improved by 1988 and at the time called for the American Library Association's Reference and Adult Services Division to provide leadership to remedy the situation.<sup>4</sup> In addition to the aforementioned tasks, Jerome Library reference staff also hoped to identify and fill any previously unidentified gaps in the collection. A properly conducted review can be an excellent method of improving the staff's knowledge of the collection, resulting in improved reference service.

Reference librarians were concerned about the potential effects of adding the science reference collection into a space that was already rather crowded. They did not want to lose any of the seating in the reference area and did not want

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to replace the shelving in the reference area with compact shelving. Both had been suggested as possible solutions to the impending space problem.

Staff discussed the changes in reference services and resources brought about by improved technology and the move to online publishing. Students and faculty have developed an insatiable appetite for online resources, changing the types of questions asked and the forms those questions take. There has been a noticeable diminution in ready reference questions, although the number of these questions was easily replaced by requests for help with computer and printer problems.

As remote users proliferated, online resources replaced some of the familiar print ones. By 2005, the BGSU libraries had replaced a substantial number of print resources with online books, periodicals, and research databases. The availability of e-mail and chat reference service accelerated the migration from print to online resources.

The reference librarians had just finished a major review of standing orders and were acutely aware of how many formerly essential reference sources were now receiving little or no use. The discussions for this review included a consideration of the purpose of the reference collection. Mathews and Tyckson identify two opposing philosophies of reference collection development. One, based on format, holds that any book that is formatted as a reference book, such as a handbook, encyclopedia, dictionary, or almanac, should be in the reference collection. The other theory is based on usage. Proponents of this theory believe the reference collection should include resources that contain the information needed to answer the reference questions expected at a particular library.<sup>5</sup> The consensus among the reference librarians was that the library needed a reference collection that would conform to the second theory, based on usage.

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## REVIEW OF STANDING ORDERS AND SUBSCRIPTIONS

During the 2004–2005 academic year, the reference librarians reviewed the reference standing orders and subscriptions. Although the reference budget had increased in recent years, the cost of reference materials seemed to have risen even faster. The reference staff also did not want to allocate any portion of the reference budget to titles that were no longer used. Because of the high demand for online resources, the staff also wanted to shift some of the budget allocation from print to electronic format.

Throughout the spring semester, the reference librarians examined the standing orders and determined which titles were no longer used.

Some types of questions were not asked at the reference desk any longer, and this lack of interest resulted in cancellations of the corresponding types of books used to answer those questions. Directories were particularly affected. Even such standard sources as *Congressional Yellow Book* and the *Washington Information Directory* were receiving little use, although other directories such as the *Encyclopedia of Associations* and the *Gale Directory of Publications* still retained some usefulness. Other sources were no longer useful due to changes in the curriculum: courses were dropped or entire programs changed focus.

Some sources had been replaced by online databases, such as *Facts on File* and *CQ Researcher*. In some cases, the paper resource did not have an exact equivalent, but the type of information contained in the paper set was now available in one or more online databases, and the paper set was rarely used, such as *Editorials on File* and the majority of the law reporters in the collection. Of course, the libraries had replaced many paper indexes with research databases. The librarians decided to cancel some additional subscriptions to paper indexes either because most of the journals covered were included in other databases, or there was a database that was close enough in content that students and faculty had stopped using the paper index.

Harloe and Barber recommend that as many questions as possible about reference serials should be settled before a review of the reference collection takes place because these decisions can be very time-consuming.<sup>6</sup> The discussions that accompanied the review of the standing orders and subscriptions were an excellent precursor to a complete review of the reference collection because they helped define and solidify a general consensus about what should and should not be in the collection. One article that was particularly useful in framing some discussions was Tyckson's "Facts Go Online," where the author examined the current use of a list of core reference titles he had compiled a decade earlier and determined that most of them were now rarely used because of the increased use of the Internet and databases. As a result of his findings, Tyckson speculated on the current and future usefulness of a print reference collection.<sup>7</sup>

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## THE REFERENCE COLLECTION DEVELOPMENT PLAN

The Reference Collection Development Plan had been completed ten years before this review was performed. It provided detailed information about

what should be purchased for each curriculum area. This plan was still helpful, but some sections needed to be revised. Ideally, this plan would have been revised during the summer and the review of the collection would have been accomplished during the fall semester. To complete the review in the time available, the review had to be done during the summer when there were fewer students and faculty using the collection and when the reference librarians had more time to devote to this project. Therefore the revision of the collection development plan had to be postponed until after the review of the collection was finished.

Harloe and Barber argue that both a collection development plan and a weeding plan should ideally be in place before weeding, but they note that, in practice, these policies are frequently improvised as the review progresses. They derive some comfort from the fact that the discussion necessary to resolve these conflicts in theory and principle “will also be fruitful to the collective understanding of the strengths and weaknesses of the reference collection.”<sup>8</sup>

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## PLANNING THE REVIEW

Mosher delineates the steps in planning a review of a collection as:

- Determine the amount of staff time needed and available from all affected library departments.
- Write procedures and design any necessary forms.
- Develop a project timetable.
- Inform participating staff of the goals and procedures, the timetable and weeding assignments.
- Consult with faculty on the plan itself and on the disposition of materials to be removed from the collection.<sup>9</sup>

Harloe and Barber add to this list the following questions that must be answered during the planning phase:

- In addition to reference librarians, should bibliographers and teaching faculty be involved in the review?
- Who will assign the areas to be weeded?
- Who will review the materials that are removed from the collection?
- Who will make the final determination on the disposition of materials?
- Who will settle disagreements?<sup>10</sup>

When libraries plan to do “crisis weeding,” a common practice is to pay strictest attention to large sets and thicker volumes to gain the greatest amount of space with the least effort. Another tendency when space is a primary consideration is to weed the areas that are most in need of weeding, specifically the areas where more books are being purchased. Sections of shelving that have less activity may be left alone.<sup>11</sup> Although we planned to remove some large sets from the shelves, we wanted to be comprehensive and planned to conduct a title-by-title review.

One important part of the process is to delineate the reasons for removing materials from the collection. The most commonly used reasons have remained remarkably stable over the past thirty years. In 1977, Coleman and Dickinson listed the criteria for weeding as follows: importance of the source, comprehensiveness of the information, importance of the subject area, language, use, availability of a newer edition, serial nature of the publication, duplication of information in other reference materials, number of copies available, and condition of the book.<sup>12</sup>

Engeldinger surveyed academic libraries in 1982, finding the most common reasons given for weeding were the age of materials, lack of space, availability of superseding editions, and lack of use of materials.<sup>13</sup> A survey conducted in 1985 by Biggs and Biggs echoed Engeldinger’s findings.<sup>14</sup> Similarly, an article published in 1990 by Truett lists criteria given by libraries in interviews she conducted with librarians in fourteen libraries (both academic and public):

Unwritten criteria given by libraries (with number of libraries mentioning them) included: age, currency, timeliness (9); use (7); newer edition available (6); suitability for circulating collection (3); historical significance (2); availability of newer or better title (1); budget constraints (1); standing order dispositions (older editions sent to branches) (1); appropriateness for collection (1); incomplete sets (1); judgments based on subject area expertise (1); and current listings in standards tools (e.g., Sheehy, BIP) (1).<sup>15</sup>

Finally, in 1997 Slotte cited the following reasons for weeding reference materials: lack of use, age of materials, presence in available indexes, lack of citation to reference sources, convenient availability elsewhere, reliability of information, and presence on standard lists of recommended sources.<sup>16</sup>

In all of these studies, age or currency of materials is often mentioned as a reason for weeding. In fact, maintaining the currency of a reference collection is sufficiently important that the ACRL Standards for Libraries in Higher Education states, "Collection currency and vitality should be maintained through judicious weeding."<sup>17</sup> The guidelines for the previous review included the standard factors to consider when weeding a collection: currency of information, amount of use, collection levels for that subject area, inclusion in standard guides to reference sources, and condition of the book.

Although many of these articles cited lack of use as a reason for removing materials from the collection, this has not always been easy to determine. In 1985, Biggs and Biggs found that most librarians estimated use based on "commonsense judgment."<sup>18</sup> In 1990, Biggs reported the results of a survey that asked librarians how they determined use of reference materials. She categorizes the major methods of counting use: (1) Placing something in or on a book that would be disturbed when it was used; (2) Recording each time a book was reshelfed; (3) Asking library users what books they use; (4) Conducting other types of user questionnaires or interviews; (5) Observing, unobtrusively, the actions of library users; and (6) Asking librarians what sources they used.<sup>19</sup>

In the main reference collection at the Jerome Library, shelveers had used a database to record in-house use since 1996. But Biggs points out that this type of use study does not provide qualitative data and usually underestimates use because many people reshelve the books they use or because a book may be used more than once before being reshelfed. She also notes that use may be overestimated because of books being pulled from the shelf in error.<sup>20</sup> The recorded use can be regarded as only an indication of use because, despite signs, some library users reshelfed their books. The reference staff decided that this was particularly true in the index area, making the in-house use data less valuable for a review of this part of the collection. This turned out to be true of some other areas of the collection. We removed some Greek language dictionaries from the shelf because of low recorded use, but were contacted within twenty-four hours by a faculty member who said he frequently used these volumes, but always re-shelfed them. We immediately restored the dictionaries to the shelves, pleased that they were critical to at least one of our users.

Relying on in-house use data is problematic for several other reasons. All subject areas in a general reference collection do not get the same

level of use, so there can not be an overall rule that a certain number of uses would result in keeping a title. Although we wanted to create a collection that was truly what we used instead of what we thought should be in an ideal reference collection, we decided that some types of resources needed to be retained even though the recorded use was infrequent. Weekly or monthly issues of some serial publications do not get barcoded, so use was recorded only for the annual compilation. Some large sets, such as the *Dictionary of Literary Biography*, receive considerable total use, even though an individual volume might receive little use. Some underused titles contain unique information that is occasionally needed quickly, but would be difficult to locate if the volume was located elsewhere in the library or at the storage facility. At that time, we were not recording use for materials in our Ready Reference Collection. Even with the limitations of using in-house use data, the reference staff decided it was far more useful than relying on our subjective opinion about what was being used.

In addition to the increase in the number of years of use data, these data were also more convenient to access. During the previous review, the use data were available only by using a telnet client and inputting a series of key strokes. For this review, the data were accessible from our personal accounts in the Web catalog and required fewer keystrokes. A list of reference books could be produced, loaded into a spreadsheet, and manipulated to produce a list of titles with the number of uses of each title. This list would be in order by call number as determined by a digit-by-digit sort. Alternatively, a list in call-number order could be produced from the Web catalog, although this list did not have use statistics. The reviewer would then have to add the use statistics. Neither method was a perfect solution, but both were an improvement on what had been available during the previous review of the collection. For those who did not want to make a list, the reviewer could choose to take a wireless laptop into the stacks and check the use data for each book as it was examined. All three of these methods were more convenient than what was possible during the previous review.

The procedures and guidelines were rewritten to reflect changes in reference services and procedures. In part, this was a result of the increase in electronic resources. The decision was made to purchase more electronic resources and fewer paper ones, including the purchase of electronic versions of reference books. The time is long past when any librarian would write:

It was believed that computer database

searching is not yet fully integrated into reference service, and the buying of access to information in electronic form, rather than the information printed on paper and eternally present on the shelf, is unacceptable to most librarians; hence, it was expected that the availability of these databases would have little, if any impact on collection development policies or practice.<sup>21</sup>

As a result of their 1987 survey, Biggs and Biggs conclude, “The acceptance of buying *access* in lieu of *books*, under some circumstances, seems sure to increase as more databases become available, on-line reference expands, and space shortages grow more severe.” But the authors note, “it is unlikely that even five libraries would cancel a staple such as the *Reader’s Guide to Periodical Literature*.”<sup>22</sup>

Paper copies of some reference books had been purchased before they were made available full text in a database. The reference staff decided to transfer most of these books to the circulating collection. A few titles were retained, such as the *Oxford English Dictionary*, because the paper version was still receiving significant use, sometimes because a faculty member required students to use the paper edition.

Types of reference materials that were no longer greatly used also were to be removed from the collection. We had stopped purchasing many directories and decided to withdraw most directories that were at least five years old. Most subject bibliographies were transferred to the main stacks or to the off-site storage facility because they were rarely used to answer reference questions any more, but might still be valuable for student and faculty research.

Some sections of the collection had grown larger than was necessary to answer reference questions, a notable example being the section of language dictionaries and thesauruses. We planned to make this section of the collection substantially smaller and to transfer some dictionaries to the main stacks to meet the increasing demand for circulating copies. The library also provided some electronic editions of language dictionaries, and we anticipated that these would be more heavily used as students and faculty discovered their availability. The number of quotation books had also grown, and we had noticed that some books, even some that had received positive reviews, provided only the author’s name as the source of the quotation. We decided that this was not sufficient for reference work and planned to transfer these volumes to the circulating collection.

An effort was also made to streamline the process as much as possible for the reviewers. While all reviewers accepted that this was a necessary task, it was not one that was embraced with enthusiasm. Majka lists terms used by various authors about weeding, “time-consuming, dusty, frustrating, endless, discouraging, labor-intensive, tedious, and arduous” and compared it to a “shot-gun wedding—work done only under the duress of full stacks or prior to a visit by the accreditation team.”<sup>23</sup> We also alleviated the amount of work required of each reviewer by involving virtually every member of the library staff who worked at the reference desk. During the previous review, the librarians had filled out a form for each volume to be removed from the reference collection. For this review, the cataloging department generously agreed to forgo this form if each book truck was clearly labeled and contained only one type of transfer. This allowed librarians to place a color-coded, labeled paper flag in each book to be removed instead of filling out any forms.

The process for reviewing the collection was simple. Librarians were assigned one or more sections of the collection to perform a title-by-title review, such as that espoused by Adalian and Rockman.<sup>24</sup> They needed to look at each title to decide whether or not it should be retained in the reference collection. If they decided to keep it, they were to see if it needed to be repaired. If they decided to remove it from the collection, they placed the appropriate paper flag in the volume, indicating whether the book should be withdrawn or sent to the circulating stacks or to the off-site storage facility. Under the supervision of our office manager, students removed the flagged books from the shelf and placed them on labeled book trucks. The librarian in charge of the project reviewed all books to be removed from the reference collection. In addition, all librarians had the option of reviewing these books before they left the reference office.

Equally important as removing unneeded books was deciding to recommend a purchase. In some cases, we discovered that a volume was missing from a multivolume set, a newer edition had not been purchased, the only books we owned on a subject were out of date, or, rarely, there was a gap in the collection. Suggestions for purchases were given to the librarian charged with collection development of the reference collection.

The timetable for the review had to conform to the academic year schedule. Because the spring semester ended in early May, the review was planned to start as soon as the semester ended and to be completed by August, allowing time to prepare



for the fall semester, which would begin in late August. Requests for purchase of new materials were due by September. Within that time frame, each reviewer was responsible for managing his or her own schedule.

This project had been discussed at several meetings, and all participants were kept informed as the guidelines and procedures were written. These procedures were written by the librarian in charge of the review and by the office manager who coordinated all parts of the process after the reviewers had flagged the books to be removed from the shelf. The procedures and review assignments were given to participants several weeks before the official start of the project. Because we anticipated removing so many books, this project was sometimes referred to as “Weeding Gone Wild” or “The Big Weed.”

### The Big Weed

For the most part, the process went smoothly. Because the reference staff had already discussed what types of materials should be included and what kinds of changes needed to be made, there were few disagreements about what to remove from the collection.

Reviewers were free to perform their tasks as they saw fit and exhibited a variety of styles. Some librarians easily removed a substantial number of books at one time. Others reviewed a section as many as four times, removing additional books each time. Some librarians consulted subject specialists or teaching faculty. Several sections were reviewed by a pair of librarians, as the designated reviewer sought a second opinion for a section that lay within the instructional area of more than one librarian.

After the process had begun, the reference staff was asked to be cautious about sending books to the off-site storage facility or to the circulating stacks because of space considerations in both areas. Because our library is a member of OhioLINK, books from the more than eighty OhioLINK libraries can be requested online by students and faculty and generally arrive in two to four days. All reviewers were urged to check the number of OhioLINK copies of any book that would be transferred to a circulating collection and to withdraw our copy of the book if there were sufficient available copies.

As a result of this project, the staff decided to remove travel guides and to decrease the number of career guides. Both types of books were sent to the circulating collection if they were sufficiently current to still be useful.

The reference staff examined the larger sets of indexes as a group, but decided that most decisions on indexes should be made by the person assigned to that subject area. The staff also decided to keep all indexes to plays, poems, speeches, and short stories, but to explore ways to make these indexes more easily identifiable.

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### THE OUTCOME

The review was a success because we met our goals. The review resulted in 1,500 of the 8,800 titles (17 percent) and 4,600 of the 34,000 volumes (13 percent) being removed from the reference book collection. We created sufficient space for the science reference collection. Books that were no longer needed in the reference collection were moved to the circulating collection, the off-site storage facility, or removed from the library. New books were purchased to replace missing volumes and older editions, to update a portion of the collection, or to fill a gap. Because lesser used materials have been removed from the shelves, it is easier to find the books that provide answers to the questions our students and faculty ask at the reference desk. The reference staff gained a greater knowledge and awareness of the contents of the collection, improving the service we are able to give our users.

A portion of the reference book budget has been designated for online materials to replace some paper reference resources. Most reference materials are purchased from the approval plan, standing order, or database budget. But there is also a budget designated for purchase of other reference books. In 2004–2005, this budget was \$40,000, and the science reference book budget was \$35,000. After the review of the Jerome reference collection, an online reference budget was initiated, by transferring \$15,000 from the reference book budget and \$10,000 from the science reference book budget, plus an additional \$15,000 from other funds. In the 2005–2006 academic year, another \$10,000 was transferred to the online reference budget from the now-combined Jerome and science reference book budget. One item purchased from this new fund was a subscription to the *Reference Universe* database in the hope that it will make the existing collection, both paper and electronic, easier to access and more usable.

The new revision of the reference collection development policy includes a weeding policy. Procedures have been written for a continuous review of the reference collection, eliminating the need for “crisis weeding.”

## ENSURING SUCCESS

Nothing can ensure complete success, but some precautions will increase the likelihood that a review will be successful.

Among the recommendations made by Majka are the following:

- Write a reference collection maintenance policy and then use it.
- First review materials that are most likely to need weeding.
- Don't keep a book just because you like it or because it's in an old guide to reference collections.
- Don't keep materials that aren't used to answer reference questions.
- Use computers to do as much of the work as possible.<sup>25</sup>

Similarly, Harloe and Barber urge libraries undertaking similar projects to keep the following guidelines in mind:

- Allow sufficient time for writing policies and procedures before beginning the review.
- Make sure all of those involved in both reference and technical services understand who will accomplish any tasks necessary.
- Ensure that everybody knows who is in charge and who will make the final determinations if there is a dispute about what should be removed from the collection and where it should be sent.
- Allow enough time to complete the project and be flexible in following the schedule.<sup>26</sup>

Discussing what should and should not be in the reference collection was critical. Open communication helped determine what should be in the procedures and guidelines and minimized disagreements. Once the process began, it continued to be discussed at reference meetings, and all participants were welcome to express any concerns or make suggestions at that time or to the librarian in charge of the process.

One obstacle to performing a review of a collection is that reference librarians do not always feel they have sufficient expertise to decide what should be removed from the collection. As much as possible, reviewers should be assigned to areas that match their subject knowledge. We encouraged reviewers to consult with other librarians and faculty members when desirable. An advantage to consulting with faculty members is that it may help avert the public relations problems that can be caused by discarding a faculty mem-

ber's favorite reference book. In the year since the review, the only challenge to materials removed from the collection concerned the set of Greek language dictionaries needed by a faculty member.

It is helpful to have the option of sending books to a storage facility because those books can always be recalled and returned to the reference collection, although you do not want a storage facility to become a dumping ground for unusable materials.

Most of the librarians conducting the review did not consider it to be a fun task, thus efforts should be made to make the process as streamlined as possible. One way to do this is to make use of technological advances. Having relatively easy access to use statistics makes the process more efficient.

It is important to have sufficient staff to perform the review in a timely fashion. Ten librarians and two classified staff members, all of whom provided reference service, reviewed sections of the collection. Each reviewer was assigned approximately eighty shelves to review. Another classified staff member coordinated the myriad details involved and supervised students who assisted in this project.

There must be a way to track progress so that everybody knows when the project will be finished. To provide visual markers of completion, we put up posterboard covered with strips of paper that represented sections of the collection to be weeded. As reviewers finished a section, they tore the appropriate piece of paper off the board so everybody involved could easily identify which sections were completed.

Any review of the collection requires the cooperation of other units within the library. It is crucial that those units know what to expect and that the workflow within those departments is considered when making a timeline for the review. Vincent pointed out that, at one university, the cataloging department did not want to add the processing of weeded reference books to its workload, and the circulation department did not want to transfer reference books to the circulating stacks, which were already full.<sup>27</sup> Harloe and Barber felt that communication with technical services was so essential to the success of a review of the reference collection that they recommended the library appoint a committee to coordinate the process between reference and technical services.<sup>28</sup> Fortunately, the Access Services Department and the cataloging department in the BGSU libraries were extremely helpful during our review of the collection, as was the staff at our remote storage facility.



Having their cooperation was invaluable to ensuring a smooth process.

Finally, the reference staff would have welcomed Evan Farber's suggested volume of "A Weeder's Guide," a "whimsical suggestion of a list of books not for college libraries."<sup>29</sup>

## CONCLUSION

The reasons for removing items from the reference collection, as listed in articles published between 1977 and 1997, remained remarkably stable.<sup>30</sup> The rapid proliferation of online reference materials has dramatically transformed reference collections. It has caused the type of reference questions to change as users search the Internet for answers to questions reference librarians once categorized as ready reference. It has also caused librarians and users to choose to answer questions using online sources instead of identical or similar paper materials. Cardina and Wicks write, "Automation of information systems has been the driving force behind transformations both in the library environment and in reference service practices."<sup>31</sup>

Roncevic cited several instances of libraries in which paper books and periodicals were being reduced in favor of online resources. Although she says, "librarians still generally agree that there is confusion about how best to manage reference collections during the period of transition," she concludes that some librarians believe that online reference materials will soon completely replace the traditional paper resources.<sup>32</sup>

This transition should result in the need for smaller collections of paper reference materials and the shift of budgetary resources to support the demand for online resources. Reviewing reference collections will be essential to ensure that we provide the most current and complete information to our users.

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