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CHAPTER 6

Building Better Collections Through Relationships: Sharing Expertise During Collection Downsizing

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ABSTRACT

Boise State University's Albertsons Library undertook a substantial collection downsizing project in 2017. A survey tool was developed to investigate whether this project would strengthen working relationships between technical services staff and librarians. The survey would allow us to assess the process and its outcomes and gain insight into the emotions of those participating in the project. Survey results showed librarians and staff members had different experiences during the project. Librarians experienced more anxiety during the process than staff. More staff than librarians felt that there was a barrier to sharing their expertise due to their job role. Perceptions of technical services and librarians were not significantly changed throughout the process, although survey comments indicated an increased collegiality among staff and librarians as a result of the project. The comments of the survey respondents revealed that a high-level strategy for weeding and a shared understanding of objectives and best practices would have given the project more cohesion, supported buy-in, and increased participation. Using a survey such as this prior to undertaking a large-scale weeding process would help identify communication preferences, areas where training is needed, and best practices to use for the project. A similar survey after the project would evaluate the success of implantation from the perspective of library employees.

INTRODUCTION

In 2017, Boise State University's Albertsons Library undertook a substantial collection downsizing project to free up space for the expansion of the College of Innovation and Design. The magnitude of the project required the participation of most personnel within almost every library unit. While the Albertsons Library has conducted many collection management activities over the years, a project of this scope had not been undertaken before. To track the impact of the project on library staff, the authors developed a survey instrument to solicit feedback on the process and its outcomes and to assess how the feelings and working relationships of library personnel had been affected. This chapter will explore the results of that survey, with special focus on the impact of large-scale downsizing on relationships between technical services staff and librarians and the knowledge gained by survey respondents about collection management and the role technical services plays in that process.

BACKGROUND

Boise State University is a doctoral/research institution, with a student population of over 23,000 undergraduate and graduate students. Albertsons Library is centrally located on the 285-acre campus and is a hub for student and scholarly activity. The library's four floors contain collections, classrooms, open study space, and group study rooms. Visits average about 450,000 annually, and extensive online services are widely used.

In 2015 a new college, the College of Innovation and Design (CID), was established at Boise State University. As university administration had decided the CID was to be housed within the Albertsons Library building, in summer 2015 library collections were weeded and shifted to free up space. The library withdrew over 20,000 print journal volumes corresponding to JSTOR archival collections, as well as some curriculum materials. By the fall semester of 2016, the CID's enrollment and curriculum growth required additional space. The CID's expansion necessitated that the library free up 10,000 additional square feet, requiring the rehousing or withdrawal of 110,000

volumes/items. A newly available retrieval facility could hold approximately 30,000 volumes, but the library would need to withdraw approximately 78,000 additional volumes. The initial time frame for completion of the project was ambiguous but tight. The goal was to have the volumes withdrawn before the start of the 2017 fall semester.

Planning for the downsizing project started in February 2017. Almost all library units were involved in the project in some manner, although most of the effort was handled by three units: acquisitions and collections, instruction and research support, and access services. The traditional functions of technical services are handled by the acquisitions and collections unit and the cataloging unit. The acquisitions and collections unit is organized by the functional areas of serials; receiving and collections; and ordering, interlibrary loan, and gifts. The cataloging unit handles complex copy and original cataloging. As of the writing of this chapter, the acquisitions and collections unit comprises 16 professional and classified staff while the cataloging unit comprises 1 librarian and 2 classified staff. Overall collection decisions are made by the library's collections council. The council is chaired by the head of acquisitions and collections with membership of the dean, the associate dean, and the heads of access services, instruction and research, and cataloging. All Albertsons librarians have collection responsibilities in their assigned liaison areas. Although several library classified staff members have MLS degrees, throughout this chapter "librarian" refers to tenured and tenure-track library faculty.

Collection responsibilities of Albertsons librarians varied widely, as did their collection management experience. Some had extensive experience with collection management and had been weeding their collections on an ongoing basis throughout the years. Some, particularly those who had been hired within the past eight years, had little experience with collection management and weeding at Albertsons Library. Over that eight-year time span, the increase in demand-driven acquisitions (DDA) and the decrease in print monograph budgets have reduced opportunities for the traditional collection roles of budget management and selection of items for the collection. Technical services staff continued to receive and process purchasing suggestions and requests from librarians but also established procedures for purchasing items requested directly from patrons for DDA titles. Librarians were consulted about database and e-journal

packages and worked with faculty who requested materials, but they were not involved extensively in developing and curating the collections in their subject areas.

THE DOWNSIZING PROJECT

The collections council concluded that there were obvious candidates for weeding in the print collection, including back files of print journals for which the library had perpetual online access. Librarians were responsible for reviewing the print collection in their assigned subject areas, with an eye toward weeding unused titles and those not relevant to the teaching and research mission of the University. As a starting point, acquisitions and collections generated print collection lists in Excel that corresponded to the subject areas assigned to each librarian. Each collection spreadsheet included bibliographic information and usage statistics for print titles within specific call number ranges. Librarians developed their own methods to evaluate their lists and determined selection criteria for withdrawal. Once decisions were made, most librarians recorded their retention decisions on the collection lists and returned the lists to acquisitions and collections so that items marked for withdrawal could be pulled from the shelves by acquisitions and collections staff or access services staff. Some librarians pulled the materials they wished to be withdrawn themselves and brought the items to acquisitions and collections. Once the decisions or the items were brought to acquisitions and collections, the receiving and collections section manager coordinated the process of preparing the materials for withdrawal. Depending on the list and subject area, some items were immediately pulled, some were sent to other subject librarians for review because of the interdisciplinary nature of the subject, and some were sent to the collections council for review. Once the decisions were finalized, acquisitions and collections staff prepared the materials for withdrawal and access services staff shifted the remaining materials. The collections council acted as a guide and the ultimate decision-maker about retention decisions.

As of the writing of this chapter, 78,000 print volumes and many sets in microform have been withdrawn from the collection. The required space will be vacated by the library and the College of

Innovation will be able to begin renovations in spring 2018. The goal of the downsizing project was met, but not without some speed bumps and concerns.

SURVEY METHODOLOGY

To fully understand the impact of the downsizing project on staff and interdepartmental relations, a survey instrument was developed and administered to current librarians and staff members and former librarians and staff who had been employed during the project. Reviewing library literature revealed a few examples of surveys being used to query library staff about working relationships. Claire Hill, a librarian in Perth, Australia, conducted a study of over 200 library workers, examining the relationships between librarians and library technicians/paraprofessionals. Hill asked questions about tensions and difficulties in working relationships between the two groups. Respondents were also asked if they felt working relationships could be improved.¹ A group of librarians in Canada conducted a study in 2015 using a survey that asked about changing roles and perceptions of librarians and paraprofessionals. Using a Likert scale, they asked respondents to agree or disagree with various statements about different job roles.² After reviewing these articles, a decision was made to build a new survey instrument to use the prism of the downsizing project to examine staff members' attitudes and perceptions of each other.

The survey questions were grouped into seven sections: experience and involvement, confidence, methodology, feelings, relationships, process improvement, and outcomes. The experience and involvement section asked questions about years of service and whether the respondent had taken a collection management course and, if so, whether that course included information about weeding and deselection. The confidence section asked about the respondent's confidence in making weeding decisions. The section on methodology asked questions about how weeding decisions were made, including whether the respondent had worked with faculty from their liaison areas to make deselection decisions. In the feelings section, we asked how the respondents felt about the process and whether there were emotional reactions to their assigned tasks and responsibilities. The relationships section focused

on how librarians and technical services staff worked together, to determine whether each group's perceptions of each other changed because of the work that was done on this project. Questions about the process sought feedback about how the weeding and collection management processes could be improved. Lastly, we sought to identify project outcomes that could inform future weeding efforts.

Qualtrics software was used to create the survey instrument. The survey and survey process were submitted to and approved by the authors' institutional review board. On October 9, 2017, the survey was distributed to Albertsons Library current and former librarians and staff who had been employed during the project. Survey recipients were given until October 17, 2017, to respond, with a reminder sent on October 12 to those who had not yet completed the survey.

RESULTS AND DISCUSSION

Of the 51 staff members who received the survey, 38 (75%) completed it. Twenty-four respondents indicated they were staff, and 14 were librarians. Fourteen respondents classified themselves as working in technical services, and 24 said they were not members of a technical services unit.

Questions on the experience and involvement of staff and librarians revealed that overall staff members involved in the project had longer tenures at Albertsons Library than the librarians. As table 6.1 shows, over half of the staff members (13 = 54%) have more than 10 years of service at Albertsons Library, while less than a quarter of the librarians (3 = 21%) have been employed here that long. Total years of library experience did not reflect that disparity.

When asked about involvement in the weeding process, all librarian respondents felt involved at some level, with half indicating that they were highly involved. In terms of raw numbers, the group somewhat or highly involved in the project was composed almost equally of staff (11) and librarians (12).

Equal numbers of staff and librarians remembered taking collection management coursework. Of those who remembered whether their coursework covered weeding or deselection, only 25% had coursework that thoroughly covered weeding. More staff than librarians

Table 6.1 Experience and Involvement of Staff and Librarians

	<i>n</i>	Staff	Librarians
<i>Length of service at Albertsons Library</i>			
0 to 5 years	13	8	5
6 to 10 years	9	3	6
11 to 15 years	1	1	0
More than 15 years	15	12	3
<i>Years of library experience</i>			
0 to 5 years	4	3	1
6 to 10 years	8	4	4
11 to 15 years	4	3	1
More than 15 years	22	14	8
<i>Taken courses in collection management</i>			
Yes	16	8	8
No	19	16	3
Don't remember	3	0	3
<i>Course characterization (16 respondents selected all that applied)</i>			
Collection management a primary focus	13	6	7
Collection management only a small part	1	0	1
Weeding only touched upon	6	2	4
Weeding was thoroughly covered	4	3	1
Don't remember much	1	1	0
<i>Applied principles from coursework to this process</i>			
Yes	11	5	6
No	2	2	0
Unsure	3	1	2
<i>Level of involvement in the weeding process</i>			
Not involved at all	3	3	0
Involved at a peripheral level	11	9	2
Somewhat involved	14	9	5
Highly involved	9	2	7

indicated that weeding had been thoroughly covered in their coursework. Almost equal numbers of staff and librarians applied what they had learned to the weeding process.

As table 6.2 shows, 9 of the 14 librarians had participated in a collection review in the past, with most withdrawing between 6% and 15% of the reviewed collection. Just over half of the librarians felt they had above average subject expertise for their collection areas, and a similar

Table 6.2 Weeding Experience, Confidence, and Future Program Likelihood of Librarians

	<i>n</i>	%
<i>Previous collection review experience that included weeding</i>		
Yes	9	64
No	5	36
<i>Size of collection reviewed in previous experience</i>		
1 to 10,000 volumes	0	0
10,001 to 20,000 volumes	4	44
20,001 to 50,000 volumes	3	33
More than 50,000 volumes	2	22
<i>Quantity withdrawn in previous experience</i>		
0% to 5%	0	0
6% to 10%	3	33
11% to 15%	3	33
More than 15%	3	33
<i>Subject expertise in assigned collection area where you have the most knowledge</i>		
1—No expertise	0	0
2	0	0
3	6	43
4	4	27
5—Lots of expertise	4	27
<i>Confidence level regarding weeding before this project</i>		
1—Not confident	1	7
2	1	7
3	5	36
4	4	29
5—Very confident	3	21
<i>Confidence level regarding weeding at project's current stage</i>		
1—Not confident	0	0
2	1	7
3	2	14
4	7	50
5—Very confident	4	29
<i>Frequency of second-guessing your decisions</i>		
Never	0	0
Sometimes	10	71
Frequently	4	29

(continued)

	<i>n</i>	%
<i>Confidence level in ability to conduct a future systematic weeding program in assigned collection area</i>		
1—Not confident	0	0
2	1	7
3	2	14
4	5	36
5—Very confident	6	43
<i>Likelihood to regularly weed collection</i>		
Not at all likely	1	8
Somewhat likely	8	62
Highly likely	4	31

Note: Some percentages do not total 100 due to rounding.

percentage felt above average confidence in weeding before starting this project. At the time of the survey, after most of the librarians had completed their review, over 75% had above average confidence in their weeding evaluation process. All librarians indicated that they “sometimes” (71% of the respondents) or “frequently” (29%) second-guessed themselves as they made decisions. When asked about their confidence level for future systematic review, over 75% of the librarians felt above average confidence to do future systematic reviews.

Table 6.3 shows librarians’ responses regarding their decision methodology. As librarians developed their criteria for withdrawal, over half consulted faculty in their collection areas, either by email or in person. All of those who consulted faculty received a response, with half feeling the response was helpful and half feeling the response was limited. Almost all of the librarians used resources other than collection statistics when making withdrawal decisions, with over half consulting other library staff or fellow librarians. Half of the librarians considered the holdings of other libraries. A little under half of the group did a literature search, and a few librarians consulted colleagues outside the library and/or subject bibliographies. Some librarians asked their librarian colleagues and technical services staff about how they made decisions and whether they had suggestions for evaluation. A few based their decisions solely on usage and other collection data. Over 75% of the librarians physically assessed the collection. Most

Table 6.3 Weeding Methodology of Librarians

	<i>n</i>	%
<i>Consulted faculty in assigned collection areas</i>		
Yes, for all assigned collection areas	5	39
Yes, but for only some assigned collection areas	2	15
No	6	46
<i>For those who consulted faculty, characterization of feedback received (7 respondents selected all that applied)</i>		
Helpful	5	71
Limited	5	71
Angry	0	0
Received no feedback from faculty	0	0
Other	2	29
<i>Resources consulted besides faculty in assigned collection areas (14 respondents selected all that applied)</i>		
Usage and other collection statistics	14	100
Library staff	9	64
Fellow library faculty	8	57
Literature search	6	43
Colleagues outside the university	2	14
Subject bibliographies	2	14
Other	7	50
None	1	7
<i>Physically assessed collection when making weeding decisions</i>		
Yes	11	79
No	3	21
<i>Considered other holdings in call number areas</i>		
Yes, considered both print and online holdings	12	86
Yes, considered print holdings only	0	0
Yes, considered online holdings only	0	0
No	2	14
<i>Considered holdings of other libraries</i>		
Yes	7	50.0
No	7	50.0
<i>Worked with technical services staff beyond receiving usage collection lists</i>		
Yes	10	77
No	3	23

Note: Some percentages do not total 100 due to rounding or multiple responses.

considered other holdings, regardless of whether print or electronic, when making weeding decisions. Over 75% of the librarians indicated that they consulted with technical services staff beyond receiving the initial subject lists.

The survey asked staff about their associations with the material that was to be weeded and how they felt during the process. Fifteen percent of respondents said their weeding decisions were made harder when they had personally purchased, processed, or taught from the item. Just over 60% of the respondents expressed no frustration with the process, though a greater percentage of librarians (45%) were frustrated than staff (35%).

Comments indicated that frustration commonly grew from a perceived lack of a higher-level strategy and the absence of a shared understanding of objectives and best practices. Each part of the process was largely seen by only one group. Some staff seemed to be frustrated by not being privy to the evaluation criteria that the different librarians used for their selection decisions. Because these criteria varied widely, there was some frustration with not understanding why some items were pulled and some left on the shelf. Some librarians may have been given in-depth guidance about the withdrawal process from the subject area faculty, and technical services staff would not have known that. Staff also physically touched each withdrawn item. They were able to evaluate condition and physical use in a way the librarians were not. It is said to never to judge a book by its cover, but doing so is unavoidable when a person is tasked with removing selected books from the shelves. Some books were in extremely poor condition, and others had a deep accumulation of dust on top. Many technical services staff felt they had a direct connection to the full life cycle of the book, from purchase through withdrawal. Most librarians didn't see the physical condition of the books. Librarians also didn't see the extensive backend database work it takes to remove an item from the collection.

Over 70% of librarians felt anxiety during the process, while just over 20% of staff felt anxiety. This may be because the librarians have direct relationships with subject area faculty; if a faculty member misses an item that has been removed from the shelves, the subject librarian is typically the first person to hear about it. Just over 30% of

staff felt there was a barrier to sharing expertise due to their job role; only 14% of librarians felt that way. While most of technical services staff felt their skills were valued, over 25% did not.

When asked about the cohesiveness of the process, almost 75% of staff felt like the process was cohesive; only 50% of librarians did. Just over a third of both staff and librarians felt that the lack of an updated collection management policy inhibited the process.

Responses to questions on interactions between librarians and technical services indicated that 36% of the librarians were consulted by technical services staff, but only one technical services respondent indicated they were consulted by librarians. This result is mitigated by the fact that the two technical services staff members who had the most contact with librarians are authors of this article. As authors these two were unable to participate in the survey, and their extensive communication with librarians was not captured. These two staff members provided mentorship and guidance to librarians and staff alike. To some extent their experiences and perceptions have been incorporated into the conclusions and interpretation of the findings.

Because this project involved staff who do not often work together, the survey asked about changes in the perceptions of librarians and technical services staff of their coworkers. Less than 15% overall had a changed perception of technical services, both between librarians and staff. More than 25% of staff overall had a changed perception of librarians. When asked about working relationships between librarians and staff, over 90% of librarians and 68% of staff felt working relationships could be improved.

The comments about benefits that were gained from participation in the project revealed a common set of themes. The most frequently heard was that librarians and staff gained a greater understanding of the collection and resources. Looking at thousands of titles with associated usage data and evaluating the physical collection helped expose staff and librarians to resources they may have forgotten or not known about. Many respondents indicated that a benefit of the process was the removal of dated or biased content. The second most common theme was increased collegiality among staff and librarians as an outcome of the project.

Although 75% of librarians reported that they physically assessed the collection before making their decisions, most decisions seemed

to be made on paper using usage statistics and dates of last use. For some librarians, the task for reviewing titles was immense; the largest section included over 47,000 titles. Technical services staff were tasked with pulling the items from the shelf and were able to see the collection in context as they were pulling titles for withdrawal.

Only certain aspects of the process of making room for the CID's expansion were under library control. The bottom line was that significant collection space was to be reassigned to the College, and the collection had to be moved. The access services unit and acquisitions and collections unit determined when to shift the collection into different areas of the building and when to weed the collection. Project timing was affected by not having firm dates for the renovation timeline. There was a sense of urgency to move quickly because of funding that needed to be spent before the end of the fiscal year, but no dates were set by the University on when projects needed to be accomplished. All librarians, except for the dean and associate dean, have liaison responsibilities. Though most librarians work in the instruction and research support unit, a few work in different units.

There were many factors in our library's culture and environment that affected our ability to accomplish our goals. Most importantly, library administration supported our strategy to weed the collection as we prepared to shift the stacks. Funds were made available to provide for student shifters and for shredding and recycling the withdrawn print materials. The library also has strong middle management that kept the project moving. Most librarians saw the need for a systematic evaluation of the print collection. Their work with scholars and learners across campus helped them see how print collections were and were not used.

As we approached the project, we encountered several challenges. We had financial support from library administration but no specified objectives other than to relocate the volumes from the area designated for CID expansion. We did not know ahead of time the level of skills that would be needed for this project. Participants turned out to have differing levels of expertise with Excel and in using the catalog. Another challenge was the lack of a defined timeline. We had no choice but to work as quickly as possible in case the renovations were able to start before anticipated.

Librarians approached the weeding process in vastly different ways. Some weeded based solely on usage data, while others did

extensive physical reviews, looking at condition, multiple editions, and so forth. Each librarian decided what publication dates and usage statistics to use as guidelines for withdrawal, depending upon their subject areas and/or personal values. This process exposed the need for revised/revisited collection development policies and more guidance in collection management principles for liaison librarians. Future projects will need to include a mechanism for accountability. Acquisitions and collections staff became the driving force in right-sizing the collection because of their expertise in the collection maintenance process.

CONCLUSION

The survey coupled with our own project experience led us to some interesting conclusions about the collection and its use, staffing patterns and needs, and interunit relations and dependencies. Usage data and physical reviews of the print materials brought home just how necessary a thorough review of the collection had been, given the widespread and substantial changes that have taken place in the use of all print resources. The comments of the survey respondents revealed that a high-level strategy for weeding and a shared understanding of objectives and best practices would have given the project more cohesion, supported buy-in, and increased participation. The project and the survey brought to light limitations and opportunities in job duties and roles and highlighted potential limits to collaboration because of staff classification. Comments suggested that more frequent in-person meetings about the project to share experiences and challenges and to offer guidance might have made the process smoother. Communication about the project needed to be more frequent and delivered via email, in one-on-one meetings, in all staff meetings, and in other formats as appropriate. For many respondents the short project timeline proved to be a hindrance to participation, either because they did not have enough time in their own schedules or they didn't know how to prioritize the withdrawal work without knowing the renovation timeline. Balancing project responsibilities with day-to-day job duties was a concern for many.

We also concluded that the project would have gone more smoothly if the librarians and staff members possessed (1) a shared understanding of best practices for approaching weeding; (2) knowledge of past weeding or collection management efforts at the Albertsons Library; (3) background and contextualizing information about the collection and its different phases of development; and (4) the technical skills needed to perform the tasks assigned to them. The project leadership assumed that all librarians had a robust understanding of collection management and were already using strategies for evaluating their subject areas. We found this wasn't always the case. It was also assumed, sometimes incorrectly, that everyone had the necessary level of expertise with using Excel. Bringing everyone to the same starting point may have alleviated some of the pain points in the deselection process. Finally, we learned how much everyone supports cross-unit collaborations, or at least cross-unit understanding of work. All library staff want to see the whole picture and want to work together to achieve library-wide initiatives. A positive outcome listed by multiple respondents was gaining a better understanding of each other's job duties. Staff got to know each other better and achieved a sense of greater collegiality.

While the urgency of this project did not allow for establishment of best practices and communication of a higher-level strategy, the collections council is developing these for future collection reviews. In support of ongoing collection management efforts, the acquisitions and collection unit is developing a methodology to provide liaison librarians regular print and electronic collection reports. The authors will be presenting the results from this survey to our library colleagues; we anticipate receiving feedback that will be used in our path forward.

Despite the frustrations of library staff, challenges with communication, and the inevitable loss of library space, Albertsons Library was successful in accomplishing its objectives. Librarians and technical services staff were able to band together to manage a huge deselection project. We hope this is just a stepping stone to continuing cross-unit collaboration.

As other academic libraries contemplate embarking on large scale, all-library or multi-unit weeding projects, they might consider using this survey as a template for conducting a preassessment of library

staff. Library leadership can ask specific questions about communication preferences, the weeding process, and technical skills needed to do the work. The results of the pre-survey would be a tool to craft best practices for approaching weeding and reveal areas of technical skill that would need additional training. Taking into consideration that a common theme of many large-scale weeding projects is a compressed timeline, a preassessment may help libraries save time in the long run by identifying areas of concern, allaying assumptions, and laying a foundation for success.

NOTES

1. Claire Hill, “The Professional Divide: Examining Workplace Relationships Between Librarians and Library Technicians,” *The Australian Library Journal* 63, no. 1 (2013): 23–34, <https://doi.org/10.1080/00049670.2014.890020>.
2. Norene James, Lisa Shamchuk, and Kathrine Koch, “Changing Roles of Librarians and Library Technicians,” *Canadian Journal of Library and Information Practice and Research* 10, no. 2 (2015), <https://doi.org/10.21083/partnership.v10i2.3333>.