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# Weeding One STEPP at a Time

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## Weeding One STEPP at a Time

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Eleanor Cook started things off by giving an introduction to East Carolina Joyner Library's particular situation and setting the stage for Joseph Thomas to explain more details about this project. Attendees may be curious about the word STEPP in our title—it is not a typo. Cook explained what that acronym meant in her introduction.

To begin, why do libraries find the need to deselect materials? This is an age-old problem, even in 21<sup>st</sup> century academic libraries, as well as other types of libraries, and weeding is part of the overall collection development cycle. Typically, libraries weed in order to maintain a balanced collection, and space is a finite commodity. We need to be able to add new materials and let go of those that are damaged or worn out, out-of-date, or no longer relevant. In addition, and this is the critical factor in our situation, we need to re-purpose space for new and expanded services. Libraries are no longer mainly physical warehouses of materials, but are making a transition to becoming educational services centers. We serve a population that needs space for a variety of activities.

What kinds of services are we talking about? Many libraries (including ours) already have one or more of these: coffee shops, art gallery areas, tutoring services, and writing centers. At East Carolina University (ECU), our reference department completely transformed its space into a collaborative learning commons last year and the result has been an increased gate count and plenty of activity in that newly-designed area. We have been able to realize these space reallocations mainly by focusing our deselection on back runs of journal titles that are now accessed through digital portals. Many libraries have started down this road by weeding journals that are included in JSTOR, for example.

So when the ECU university administration came to the library last year seeking space to locate the STEPP program, it seemed like a good fit. The

university is short on growth space in general, and the library is considered prime real estate. The STEPP acronym stands for Supporting Transition and Education through Planning and Partnerships; it is a model program to assist prospective students with identified learning disabilities—sort of a “head start” for incoming freshman. Retention is a huge concern these days at universities and this program really addresses this dilemma in a targeted fashion. Because the library had already managed to re-purpose spaces successfully for other related services, the Provost's office came with an offer we could not refuse. They needed 3,000 square feet and offered us funding in order to buy the electronic back files and make the process happen. Unfortunately, we were so successful that we are perhaps a victim of our success! (More about that later.)

We had to be able to displace more than 80,000 volumes (just under 10% of the general circulating collections) in twelve months in order to make the space ready for construction—a goal we in fact surpassed. Cook showed a map of the stacks space targeted for construction to provide audience members an idea of the relative space within the building. In return, once the construction was completed, the library regained use of some of the space because the study rooms constructed were available for library patrons during evenings and weekends. The only space we actually lost was those areas redesigned for actual STEPP staff offices.

The support we were given in order to complete the project included one-year contracts for temporary staff, including one re-assigned librarian, two full-time equivalent graduate students, two full-time equivalent employees who assisted with the review and deselection process, and one full-time-equivalent position in the Circulation Department to assist with general services while the stacks manager focused on the shifting of the collection. As an aside, our stacks are now in super physical condition since every book in the general collec-

tions had to be touched twice in order to complete the shift. The first stage was a rapid effort to get the space cleared and the second shift was a more refined effort to get shelving areas adjusted for anticipated growth areas. Another important aspect of the funding was the ability to purchase additional electronic journal packages that included perpetual use arrangements when possible.

When deciding what packages to purchase, we looked for major publishers for which we already had extensive print runs. We checked the packages against our holdings before deciding which ones would be pursued for this project. Also, fortunately, we had already purchased some important sets in earlier years with end-of-year money when such funding was available. We ended up with nineteen publishers (including the usual suspects, i.e. major commercial publishers and newly-available JSTOR collections) and in all cases we are maintaining current subscriptions for at least some titles from each publisher. Please note that these backfile purchases are one-time, permanent additions to our collection, with a license into perpetuity. If we make cuts to current subscriptions in the future, access to these back runs will not be affected. The library administration was able to supplement the funding the Provost's office supplied for this purpose.

There were a couple of other things Cook mentioned before turning to Thomas to get into the details. We needed to create a swing space in order to make the shift feasible. Fortunately, we had a closed stacks area with compact shelving in the basement that we were able to use for this purpose. We also moved our oversized collection out of this area to newly-created space at the end of the general collections on the third floor. (Our general collection resides on the second and third floors.)

Before handing the presentation over to Thomas, Cook came back to a remark she made earlier about being victims of our own success. Just this fall semester, the university administration came back to the library to inform us that they planned to locate a specialized math lab within the library building, and guess what—this time they wanted to take our entire technical services area! As it turns out, this is not where the lab will be located after all, but that really

gave us a scare. The Math Lab will be going to space in the library basement that can accommodate construction with shifting only, and with no further weeding necessary for this particular project.

Thomas then took on the task of describing the nitty-gritty of the project and its processes. As we concluded our preliminary planning, we decided to follow several guiding principles. Among them was the aim to make one decision for all the physical volumes related to each title. That is, we wanted to keep title changes and splits in the same location. Also, we would need to make decisions on the microfilm for these titles. Since microfilm was not our priority—it takes up so much less space in general, is not located in the area where we needed to displace volumes, and is projected to have a long life—we decided to keep long runs of film, but we considered withdrawing short or broken runs of microfilm if we were withdrawing the print. The third guiding principle related to titles for which we planned to continue current print subscriptions. These bound volumes we decided to keep in the stacks. Of course we also took the opportunity to rethink our current print subscriptions, and canceled some of them.

Project librarians created sets of rules to govern our decisions. These rules were divided by the action: what to withdraw, what to store, and what to keep in the stacks. Project librarians would withdraw bound volumes under any of the following conditions: bound volumes from archival online packages; journals not relevant to the university's curriculum; and dead runs or those no longer received in print, especially if they were last received in 1999 or earlier, the library had fewer than ten volumes, and/or if they were not indexed. Project librarians would send to storage: long runs of titles no longer received in print, especially if they were available online (from any non-archival source) or there was some subject importance or other local reason to retain the journal. Last, project librarians would keep in the stacks those journals which were still received in print, those recent long runs with no online access, titles especially important to the subject area or those which were of significant value to the local collection. Table 1 captures these rules in a more succinct fashion.

Rules for the STEPP Project		
Withdraw	Send to Storage	Keep in Stacks
Bound volumes in archival packages	Long runs of titles no longer received in print, especially if: <ul style="list-style-type: none"> <li>• Online access if available (from any provider)</li> <li>• Subject area importance</li> <li>• OtherLocal reason to retain</li> </ul>	Current print subscriptions
Dead runs or incomplete runs no longer received in print, especially if: <ul style="list-style-type: none"> <li>• Last volume 1999 or earlier</li> <li>• Fewer than 10 volumes</li> <li>• Not indexed</li> </ul>	Poorly scanned or leftover volumes from titles in archival package (if greater than 10), if accessible online	Recent long runs (30 volumes or more) with no electronic access
Journals no longer relevant for university curricula		Subject area importance
		Significant value to local collections

Were there exceptions to these rules? Of course, and they generally took one of two forms: subject-area considerations or importance to the local collection. Thomas provided the example of print journals in art as a subject-area consideration, and the color plates that are necessary for many fields, including geology. Since Maritime History is an important field for East Carolina, we did not withdraw any titles related to that field. One of the points we wanted to make is that librarians familiar with their collections and their institutions' programs should feel empowered to make exceptions when necessary. In fact, we found that consistency and the lack thereof often go together.

Thomas pointed out that package-based deselection is different conceptually from other types of weeding, because removing these print volumes does constitute a loss to the intellectual content. Package-based weeding gave us the greatest space by providing the most volumes available for removal, so this is where we put the majority of our people power. First, librarians examined the license for post-cancellation rights, and directed graduate assistants (GA's) to search the package title lists for print holdings in our library. Next, the GA's compared the online coverage dates to our print holdings, noting

how many volumes (if any) the library held in print that were not part of the online archive, and whether we had any other online access to these volumes. Then, they verified the completeness and quality of three sample volumes online against the print volumes. If the online versions were complete and adequate, the GA's would withdraw all volumes in the archive, noting their actions on slips they turned over to project staff. The project staff used these slips to update catalog records.

When GA's found incomplete online coverage or inadequate scan quality for the online volumes, they consulted collection development librarians for the decision to retain or withdraw anyway. GA's also moved retained volumes (the package "leftovers" to which we had access but not ownership) to our storage area in the basement—unless that title was currently received in print. The slips the GA's used included microfilm holdings; librarians made decisions on microfilm retention or withdrawal.

Withdrawn materials accumulated at a fast rate because of the required quick pace of the project. We were fortunate to have a dedicated project team with a strong work ethic, which helped the project exceed its goals. When we considered the

disposition of these materials, we felt recycling was the right answer. State rules forbade us from simply giving withdrawn materials to a charitable organization, and the rate of withdrawal made procedures for a surplus sale unworkable. We first tried to use a campus-based recycling program that involved loading volumes onto pallets, shrinkwrapping, and scheduling with campus moving services several days in advance. After a month or so, we priced a commercial document destruction vendor who already provided services to the campus. This vendor delivered reliable service at a price we were comfortable with, providing recycling bins and scheduling pickup on relatively short notice.

The presenters showed some pictures of the stacks space before construction and the facilities for Project STEPP after construction was completed. Spaces constructed for Project STEPP include five offices, ten study rooms, twelve carrels, one meeting room, and a “living room” kind of area with comfortable seating for studying. Library patrons have access to the comfortable seating, the carrels, and at least half of the study rooms at all times, and may use all the study rooms and the meeting room on the weekends and weekdays after 5:00 pm.

The formal presentation concluded with three pieces of advice for audience members. First, take notes: otherwise, you won't remember why you did what you did. Attendees were reminded to put those notes in some place that would survive anyone who worked on the project, whether the location for the notes would be in the item records, the Electronic Resource Management System, or some shared file that other library staff could access. Second, there is no mistake that you cannot fix. If you decide later on to weed something you kept originally, you get extra space in the end. If you decide later on that you withdrew something you should not have, you can buy it again. Not that we would want to do that, but we were fairly certain that such “re-purchases” would be few and far between. Last, once you start giving away space in the library, you are not likely to get it back. Joyner Library discovered this after one group of faculty moved out, only to be replaced by staff for the writing center and

the tutoring center. And, of course, we were just recently told by university administration to host the new math lab.

At the conclusion of the presentation, the floor was opened for questions. Some audience members were interested in the total numbers of volumes that fit each rule. We know that we withdrew roughly 50,000 volumes in the one year the project was funded (probably twice that number if we extend our counts back to earlier JSTOR and ScienceDirect weeding projects), and that we stored just more than 60,000 volumes in our compact shelving area. We do not have an accurate count of how many volumes we left in the stacks. The fact that we exceeded the number of volumes necessary for construction actually helps provide a little more growth space for the collections that remain. Another audience member asked about the total cost of the project. Although we did not have the numbers then, we later discovered that university administration provided just under \$100,000 for temporary staffing (including graduate students), and a little less than \$1,000,000 for the purchase of online journal archives. Joyner Library also contributed additional funding for online journal archives, and bore the cost of permanent staff and librarians who also worked on Project STEPP from time to time. Another audience member questioned whether Joyner Library would consider withdrawing microfilm from large sets, such as Early English Books Online. Our response was that we were not yet prepared to do so, because of the relatively small footprint and long usable life of microfilm. Another audience question returned us to the mention of the Math lab: where would have technical services been relocated if indeed the administration had decided to take that space? The answer was unclear to us; no one had actually addressed that question in any detail. Once campus representatives actually walked through the space and saw that they would have to relocate close to 30 people and an OSHA regulated preservation/conservation lab, the cost factor alone probably convinced them that another space might be a better choice. The presenters closed by inviting attendees to get in touch with any future questions.