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CONSENSUS-BASED ASSESSMENT FOR RE-ENVISIONING A REFERENCE COLLECTION

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ABSTRACT

The process of weeding a reference collection is often time consuming and highly contentious. Rather than relying on a group or a single individual to make collection decisions, we outline in this paper an open process that allowed input from throughout the library. The future of our print reference collection is also discussed, as we react to overall effect of moving types of resources out of the reference and into the general stacks.

INTRODUCTION

Reference collections are best managed through collaboration and cooperative assessment. A “blue skies” approach to print reference is to never discard a title. However, for most institutions budgets are tight, space is limited, and today’s information seeking behavior favors digital formats. A major evaluation of any reference collection is especially difficult due to the existence of multiple stake holders and a lack of clear “ownership.” And, while much of the scholarly literature discusses weeding collections through reliance on internal documents, bibliographies and other librarian-created tools, this paper will examine an innovative process for assessing and reallocating reference resources based upon consensus building.

This paper will detail how a systematic assessment of the reference collection via small teams of subject specialists achieved a less stressful and more inclusive collection evaluation process. Using a user-centric model based upon transparency and consensus, we were able to arrive at timely and thoughtful decisions with minimal strife. The end result was a leaner and more usable print reference collection.

BACKGROUND: AMERICAN UNIVERSITY LIBRARY AND ITS REFERENCE COLLECTION

Like many academic libraries, American University set the criteria for inclusion in the reference collection based upon cost, informational value and concerns about access. Throughout much of the library’s history space was not of primary concern. Furthermore, the library set a lofty goal of expanding the size of its collection, which resulted in a policy of almost complete retention. After thirty years in the same building, the print reference collection reached more than 6,164 titles, which occupied 3,700 linear feet of shelving on the main floor of the library. With physical expansion not an option and the near doubling of the student body, space was no longer a luxury. The library’s collections were at capacity, and many resources had become available in

an electronic format. Furthermore, users' research habits had evolved, moving away from relying on solely on print materials to one where electronic resources were given priority. Proof of this change information seeking behavior was shown by the lack of usage of the collection. Finally, the library's LibQUAL+® survey results, as well as those of other assessment tools, pointed to a user population that wanted more computers, group study spaces, more places to sit inside the library. When renovation funds became available, the reference collection's prime real estate location was eyed as a partial solution to the meeting the desires expressed by the student body.

LITERATURE REVIEW

Relatively little has been published about the weeding of the reference collection of an academic library, especially in regard to best practices. While several authors have discussed the need for collaboration, solid and agreed-upon criteria and communication with academic faculty (Dubicki 2008; Lampasone 2008), the bulk of the surveys done in this area were conducted almost thirty years ago when the reference collection was markedly different (Biggs and Biggs 1987; Engeldinger 1986; Adalian and Rockman 1984; Truett 1990; Mathews and Tyckoson 1990). Even the advice provided by Slote in his classic work on weeding library collections is now almost 20 years (Slote 1997).

Singer (2008) provides a thorough overview of the weeding of reference materials based on her experience at Bowling Green State. But this weeding project, specifically the evaluative piece, was handled primarily by reference librarians.

THE PROCESS

Given American University Library's size and history, relying on one weeding method discussed in the current literature would not have been sufficient. With a staff of about twenty librarians and a history of public service engagement across the institution, we required a more open approach to reviewing the reference collection. The decision to move forward with a consensus-based review alleviated many of the political issues that department or individual based reviews can create. By bring cataloging, special collections, technical services and public services together, everyone had the opportunity to weigh in on individual titles. While there is the potential for this type of structure to become time consuming and even onerous, reasonable, agreed-upon deadlines tied to a process that gave everyone multiple opportunities to voice their opinions helped to keep the project moving smoothly and on schedule.

The first step after naming a project manager was to outline the potential actions for each title in reference and what the criteria would for someone suggesting that action. For our project these actions fell into four categories: retention in reference, movement to the general collection, movement to offsite storage, and removal from the collection. One aspect of this process that facilitated decisions was the availability of off-site storage through the Washington Research Library Consortium, of which AU is a part. The fact, combined with the fact that that we could

rely on our consortium partners for maintaining certain titles that we wanted to weed, made the decision process for titles of questionable significantly easier.

A list of rationales for each action was created by the members of the library's reference team to assist reviewers in deciding on individual titles as outlined below:

Resource is to be discarded

- a. Information is outdated or inaccurate.
- b. Informational content can be found through free internet or a database to which the library currently subscribes.
- c. Resource is too esoteric to justify the space.
- d. The library intends to purchase an electronic version of the resource.

The creation of this document had two purposes. First, it alleviated much of the concern regarding the democratizing of the process. Simply put, there were some who were wary of their colleagues' opinions. The document also outlined for senior library administration the reason a title would be moved or retained. Since it was the University Librarian who initiated the weeding process, those who were not fully on board with weeding the collection saw the document as an assurance against reckless removal of library materials.

The work load was divided up based upon one's job and subject expertise. Subject specialists would review and recommend changes to the print resources within their individual areas. A collection manager could either review their collection area or the entire collection. This broadening of responsibility for the collection managers was due to the multi-disciplinary nature of many academic programs. Finally, everyone would review the titles in the Zs.

The work flow consisted of the generation of title lists, in call number order, that were then given to reviewers who systematically reviewed each title. While it was generally agreed upon that the best method was physically go through the stack and shelf read the titles, no rule was created about how individuals would review titles on their own. Each reviewer was handed a printout that lists titles within his or her area(s). They would then mark for each title on the printout based upon the three actions of discard, move, or retain. If move was chosen, they would mark either stacks or remote storage. Once a reviewer completed a subject area, the sheets will be given back to the project coordinator who then added reviewers' decisions to a database. The database consisted of a title list where each reviewer's decisions were recorded. Fortunately, we had multiple reviews (at least two) for each subject area. This is where the first consensus test or trigger occurred in the process. The question of what to do when you had differing opinions about title had to be resolved. The reference team, and other interested parties, came together to develop a resolution framework for such cases. The two main points were as follows:

1. If a title is marked for discard by one reviewer and retention by another, we should retain the title.

2. If three or more people review a title, the majority opinion of the reviewers should carry. Although if it is majority discard and minority retain, the title should be brought to reference for final decision.

While this established a conservative framework, it did not stop a significant portion of the collection from being removed. There were several reference team meetings to discuss title lists of disputed title actions. The team decided that each title list report would be discussed during one reference team meeting each team member will have a chance to make a case for any changes to the lists. Then team voted and based on majority of the team the actions to the collection were decided.

After the entire collection was reviewed and disputed decisions were resolved, all the titles to be moved or removed were placed together based the actions decided, that is move to stacks shelved together or discards together. The rationale for this was to allow time for the entire library to review what actions the reviewers chosen and make finally recommendations. At this point, anyone could remove a title from discard and bring it back to the reference team for retention consideration. This allowed everyone to physically see what decision had been made on each title. After a couple of weeks, finally action lists were sent to library administration and the members of the cataloging began changing or suppressing item records.

OUTCOME/BENEFITS

After the all the shifting, reclassification, and removal of the reference books was completed the print collection was reduced to 30 percent of its original size. Of the 70 percent that was removed from the reference collection, 40 percent retained in storage or in the general stacks to circulate and the remaining 30 percent was withdrawn from the collection. One of the primary benefits, from a collections standpoint, was that the library decided to allow more than 1,200 titles to circulate. Furthermore, the portion of the reference collection that was retained is now leaner, thus more browse-able for our patrons and search-able for the librarians.

As a result of all these changes, the reference team decided to write a new collection development plan for reference that took into consideration what we decided to retain. In the past, publications like dictionaries or handbooks would automatically be added to the reference collection. Taking a more user-centric approach, we no longer sectioned material off for reference based solely on type of resource or price. For example, pocket dictionaries would be sent to the stacks, but larger ones were kept in reference. In another example, it was decided to no longer shelve handbooks in reference. We felt that students would want to refer to this sort of material during their writing and research process, so they should be allowed to take a handbook or dictionary wherever they wanted to go to write. Our belief was that the Internet made these sources more expendable and/or more replaceable and thus, mediating access to them was not necessary. Also, with the changing research behavior of patrons, the print reference title faces a lot competition for easier resources to navigate through and thus, they cannot compete unless they circulate.

The benefits of the weeding project were great. Obvious things, like the increase in floor space for additional computing and study areas, were key. Indeed, within seven months of the completion of the project, a major renovation of the main floor of the library was begun. The weeding of many obsolete, duplicate or outdated titles, and the associated cancellation of many standing orders and subscriptions, resulted in a cost savings that could be put into the purchase of other materials, including reference materials that could better serve the research needs of our patrons.

In addition to these, several tangential positive outcomes were also seen as a result of the weeding project. Everyone involved in the evaluation of titles became much more aware and knowledgeable about the contents of the collection, improving reference service for patrons. The project also pointed out the many gaps that existed in the reference collection. Any deficiencies noted by those involved in the weeding process were passed on to the relevant collection manager and head of collection development.

CONCLUSION

The project was begun in May and completed, on schedule, by the end of the year. We were charged to significantly reduce the size of the reference collection and we accomplished that objective. However, future reductions of the collection may not go as smoothly. This project primarily removed the “low hanging fruit” of books that were obsolete, duplicates, or no longer factually accurate.

Many things were learned about what the collection and our colleagues. We learned that our librarians have deep philosophical differences regarding what is and should be in the reference collection. A positive outcome was that the project also allowed the library to reevaluate whether the collection was meeting the needs of the current curriculum and patrons. Furthermore, we decided to alter the collection strategy effectively redefining what should be contained in a reference collection.

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