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Dismantling the Reference Collection

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“Weeding requires a lack of sentimentality and even ruthlessness depending on the circumstances.” (Majka, 1996, p. 73)

Abstract

In 2008, the University of Louisville’s (UofL) Ekstrom Library printed reference collection numbered almost 30,000 volumes. Copious collecting and sparse weeding built up the collection during the era before the Internet. There had been considerable reluctance to address its more outdated sections due to competing priorities and inertia. A change of leadership as well as the recognition of changing use patterns had lessened the need for such a large collection. In 2011, three librarians began a title-by-title review process that resulted in an 86% reduction of the reference collection by 2014. This article describes that process, summarizes the results, and discusses the benefits and disadvantages of this approach.

Background

Ekstrom Library is the main, or flagship, institution of the University of Louisville (UofL) Libraries, a large system which retains about 2 million volumes and membership in the Association of Research Libraries (ARL). Other UofL libraries are Anderson (Music), Brandeis (Law), Bridwell (Art), Kornhauser (Health Sciences), and Archives & Special Collections. Located on the school’s urban campus, Ekstrom was built in 1981 to house the university’s humanities and social sciences collections. In early 2006, the library added a 42,500 square-foot wing with automated storage equipment, known as a robotic retrieval system (RRS), capable of holding 600,000 books initially, and the potential to be expanded to store as many as 1.2 million volumes. At about the same time, the university closed Kersey Library (engineering and physical sciences) and moved approximately

140,000 books from Kersey to Ekstrom. Integrating such a large number of volumes might have inspired, or even required, many libraries to purge duplicate resources, but the simultaneous increase in space allowed our librarians to defer the task for several years.

How the Weeding Began

In 2008, the new department head of the University of Louisville's Ekstrom Library Reference and Information Literacy Department noted an exceedingly large number of older-looking German language encyclopedias on the most outward-facing set of shelves. Since there was no longer a German major at UofL and the encyclopedias were quite dated, it seemed reasonable to move them to other locations in the building. On further reflection, it was evident that librarian use of print reference in the age of Google was waning. This prompted a conversation with the Reference Department's government documents librarian, who also has cataloging experience and responsibilities. She suggested that we start with call letter A and work our way through the collection. This seemingly benign idea led to an ongoing revolution of sorts and a complete reconsideration of what a print reference collection in an ARL library could and should be.

The Collection Is Big, But Is It Used?

The Ekstrom Library printed reference collection was typical of other large library reference collections created in the pre-Internet era. At approximately 30,000 volumes and almost 11,000 titles, it occupied 20 ranges of shelving, with 96 shelves per range, and encompassed about 2,000 square feet of valuable first floor space next to the library's Learning Commons. It contained a wide variety of materials including encyclopedias, bibliographies, dictionaries, indexes, directories, handbooks, etc. The materials had been placed there for a variety of reasons: sometimes practical, sometimes political, sometimes just expedient. It perfectly fit Majka's description of a collection

where “for the particular convenience of librarians and patrons it occupies prime real estate at the front of the library, or even at the librarians’ fingertips; librarians go there first in response to patron questions; the books are so valuable that the library is unwilling to allow them to circulate” (1996, p. 68) but it also fit the description of “a bloated reference collection focused on the needs of patrons from 20 years ago offer[ing] little service to current patrons” (Francis, 2012, p. 220). As noted by Detmering and Sproles, at that time, Ekstrom Library’s reference collection policy described a collection that was “heavily dependent on format and comprehensiveness” (2012, p. 21). We began our project by revising the policy to help clarify our process moving forward. The new reference collection development policy highlighted the need for a current, lean, electronic-based collection that focused on the needs of current users rather than convenience and tradition for librarians. Implementation of this policy would transform the collection “into a useable, pertinent resource” (Detmering & Sproles, 2012, p. 22).

The literature of reference weeding points to use studies as one means of evaluating a collection (Kessler, 2013), but we found our use statistics, which are created by student assistants scanning volumes prior to reshelving, have many of the same problems found at other libraries, such as patrons reshelving books themselves, both student assistants and librarians sometimes forgetting to scan books before returning them to their designated locations, and books on tables occasionally being used by more than one patron before being reshelved. Moreover, reshelv counts cannot reveal whether or not a patron found what he or she needed (Nolan, 1999). In general, based on observation, we feel our statistics underrepresent actual usage, but because we have no reason to think that the problems listed above are drastically skewed toward or against individual items, we believe they provide valuable directional information regarding the relative use of various resources.

When we examined total reference reshelves over a five year period, we found an average of only 1,397 uses per year (Table 1). Recorded scans ranged from 950 in 2010 to 1800 in 2009. A

major portion of this variation is probably due to student assistant turnover and the degree to which our training and supervision emphasized scanning activities, but we know that professors' changes in specific course assignments also played a role. Overall, the ratio of average uses per year to total print reference volumes was about 4.6%, which is lower than the 7% use ratio reported by Kessler at the University at Albany (2013). Nevertheless, even if our statistics underrepresent actual use by a factor of two or more, it was clear that use could not justify the size of our collection.

Several recent articles discuss other reasons for weeding a reference collection. They often include space considerations or an impending move or renovation, otherwise known as “crisis weeds” (Arbeeny & Chittenden, 2014; Delwiche & Bianchi, 2006; Martin, Kamada, & Feeney, 2013). Additional reasons for weeding include a desire to make the collection easier to use and conversion of titles to electronic format (Francis, 2012; Frase & Salit-Mischel, 2007). Low use and these last two reasons were what prompted our desire to start a comprehensive review and deselection process, although in the end, space considerations and an impending renovation unexpectedly came into play.

Once the decision to weed was made, a process had to be created. A number of examples are found in the literature including targeting large serial runs, older items, or particular subject areas. Since the collection had not undergone a serious review in recent memory, we were interested in inventorying the collection as well as weeding. To achieve this goal, we employed a title-by-title review that would help maintain consistency and examine the collection as a whole, not just the parts with which we were most comfortable. As Nolan says, “A title cannot be weeded in isolation, each source is a piece of the overall reference collection” (1999, p. 16).

Because of time constraints, many contemporary weeding projects in the literature were not title-by-title reviews as advocated in the earlier literature. Dakota State is one notable exception; their collection was 2,720 titles at the beginning of their project and their weed encompassed 25% of their

total collection. Adalian and Rockman (1984) described a title-by-title weeding process performed at California Polytechnic State University, San Luis Obispo. This review reduced their reference collection to 57% of its original size, from 25,000 volumes to 14,331. It is difficult to pinpoint what a typical reference collection size was historically. Librarians at Bowling Green State numbered their original collection at 34,000 volumes. Their title-by-title weed in 2004-2005 encompassed 13% of their volumes at that time (Singer, 2008). The current literature lacks an account of a significantly large weeding at an ARL member library such as the University of Louisville.

Interestingly, most articles described the weeding process in dire terms and noted that librarians disliked it for a variety of reasons including the amount of time it took, how complicated the process could be, and the physical nature of it (Raphael, 2013; Singer, 2008). We found that our process which used a three-person team including the government documents librarian, the head of reference/information literacy, and a reference librarian enjoyed our weekly weeding sessions for a number of reasons. We had the opportunity to examine the collection in depth, discuss philosophical issues related to reference resources, and actually look at books, something most librarians enjoy but find themselves doing less frequently these days. Overall, this detailed approach offers a more holistic view of the collection and allowed for greater consistency in our collection decisions.

Our Process

The systems librarian ran a report from Voyager, our integrated library system (ILS), of all the titles in the reference stacks by Library of Congress call number, i.e. A, B, C, etc. Our team of three librarians gathered for two hours per week, pulled several carts of books from the shelf, compared the list to items from the shelf, and examined each piece.

In so far as it was possible, we examined a call number sub-class as a group in order to get a sense of the subject as a whole. This was consistent with advice from the literature: “Weeding is a comparative process in which the various works on a given topic are examined as a group” (Mathews & Tyckoson, 1990, p. 138; Nolan, 1999). Items missing or misfiled were noted. Reference titles could be moved because they were old, contained inaccurate information, or failed to meet the criteria under our revised, streamlined collection development policy. Electronic is the preferred format of the new policy, with printed editions being kept only if they are essential or specifically needed to support curriculum and no electronic option is available or able to be purchased. (See Appendix A for the full policy). A decision was made for each piece: keep the title in reference, transfer it out of reference, or weed it completely. After the decision was made, the government documents librarian changed the location codes in our ILS immediately to reflect the new location and the item was sent to our stacks unit for shelving in the new location or, in a few cases, to another UofL library. Items to be weeded were sent to technical services for formal withdrawal. To save time, if a title consisted of more than fifteen volumes, its destination was marked on the spreadsheet and added to a list to be changed in a batch process by our systems librarian rather than be processed immediately. Over 200 titles and at least 7,500 volumes were handled in this fashion.

We found that the three-person team was very effective because it followed Majka’s recommendation to “[l]imit the number of decision makers to a workable group of three to five people and give them the authority to do something” (1996, p. 73). In fact, when time constraints forced one reference librarian to quit the team while the project was only about 25-30% complete, we immediately replaced him with another reference librarian in order to maintain the triad. Among the three librarians, there was a wide variety of subject expertise, but we did consult other subject librarians as needed. Three also worked well when there was disagreement about whether to retain a

title or not. As we moved along, we were able to identify titles that needed to be updated, and in so far as it was monetarily possible, we ordered new editions or moved titles to electronic access.

The Results

The initial goal sought to reduce the collection by 50%. As time progressed and online sources kept proliferating as we moved through the call numbers, we found it increasingly difficult to justify keeping titles, and we found ourselves rethinking sources we once considered essential. In the end, we retained only 14% of the volumes and 10% of the titles that comprised the original collection. Surprisingly, only 1% of the volumes and 2% of the titles were missing. Most of the collection (77% of titles, 73% of volumes) was moved to other locations in the libraries (Figure 1). Slightly more than half of these transfers were to the conventional stacks (55%) versus the robotic retrieval system (45%). More books would have been transferred to the RRS instead of the stacks if there had been room, but unfortunately, as currently configured, the automated system is very near maximum capacity for items in the 10 to 12 inch height range.

Only about 3,700 items (11% of titles, 12% of volumes) were actually withdrawn rather than transferred. Of the items withdrawn, almost half (45%) were duplicates of items located elsewhere in UofL Libraries. Although we did not keep precise statistics, we found that our title-by-title review of the reference collection's bibliographic records led to the concurrent weeding of hundreds of earlier editions and duplicate items from other locations in the libraries.

In terms of subject areas, about 60% of weeded items were from Library of Congress Class Z (bibliograph), where we found numerous large, dusty, multiple-volume indexes and bibliographies that have been available electronically for some time. Social sciences (H), law (K), language and literature (P), science (Q) and technology (T) each represented about 4-6 % of weeds (Table 2). With

the exception of law (K), these areas were well represented in Ekstrom's reference collection before the project began (Table 3), so it is not surprising that they also represent a significant portion of the items that were withdrawn. It is worth noting, however, that some of the items pulled from the social sciences and law sections were due to our no longer feeling a need to keep copies of statistics and statutes that are available both online and in print at UofL's Law Library. Many of the science and technology discards were either extremely outdated or copies that were not removed when the engineering and physical sciences collections were added to Ekstrom's reference collection.

When we examined what was retained by call number class (Table 3), probably the most startling change is in range P (literature and linguistics). Previously, the P call number had comprised 17% of the volumes in the collection. This large percentage, in part, reflected the collecting interests of the previous librarians. In the new, streamlined collection, P only accounts for 4%. Along with the Ps, as noted above, the original collection had been abundant in H (business/social science, 11%) and Q, (science, 15%) indicating the number of reference titles historically published in those areas, but again in our case, also the preferences and subject area expertise of the previous librarians most heavily involved in reference collection development. The new collection attempts to reflect more closely the current curriculum needs of the university. To that end, B (philosophy and religion), G (geography), H, and Q are the predominant subject classes. H currently represents a disproportionately high percentage (27%) of reference print volumes, primarily because of two very large series (*Standard & Poor's Industry Surveys*, 348 volumes and the *International Directory of Company Histories*, 156 volumes) that we hope to exchange for electronic resources in the not too distant future. When this occurs, H will probably comprise only about 12-16% of total volumes.

Our data also show a considerable range in the percentage of items retained in Ekstrom Library's main subject areas, from 39% for philosophy/psychology/religion (B) to only 2% for bibliography (Z) (Table 4). While some of this can be explained by differences in the base size and

the nature of the material, we suspect that at least a portion of the variation is due to an evolution in our thinking over time. For example, the average percentage retained in letters A thru H is 26% versus only 9% in letters J thru Z.

When we were uncertain about whether to keep a title or not, we examined our use statistics because, as noted above, we believe they provide valuable information about the relative use of items. After the project was complete, we calculated the average number of recorded browses per title between 2011 and 2013 and found that titles retained in the reference department were browsed about 11 times more often than transferred titles, and 22 times more than those that were weeded.

Benefits of the Process

There were a number of benefits to our method. Most importantly, we maintained fairly accurate weeding which became more consistent as we progressed. By having a cataloger directly involved, it was far easier to catch mistakes such as miscataloged items or unlinked items and correct them, or to quickly ascertain the number of copies of the book in our system. By using such a small team and by having a hybrid cataloger/reference position, it was also possible to move books out relatively quickly to their final destinations, resulting in less chance of errors in the move or items getting lost in transit. This also resulted in the team directly seeing the progress being made, an important psychological consideration.

Additionally the impact on other departments was far more manageable. We certainly relied on a number of areas to help with the process such as our stacks maintenance unit, technical services, systems, and our automated storage and retrieval system coordinator, but we were able to control the workflow so that the impact was manageable for those areas as well.

Disadvantages of Our Method

Opportunity cost was probably the most significant disadvantage of this method of extensive weeding. Even if we only count the time of the reference department librarians most directly involved in the process, we found that the weeding took approximately 224 hours in librarians' time, which equated to about \$21,280. This was in part due to the librarians involved, two of whom had extensive experience and thus higher salaries. Hand-in-hand with the cost was of course the time needed to do a complete inventory and weed. While many libraries might not have the 2.5 years that we needed to complete this project, we found that the 2 hour per week pace was a good one given our other job responsibilities. When circumstances forced us to increase the pace to 8 hours per week in 2014, it became much more onerous and it was easier to make mistakes.

We also discovered it is not always possible to have a one-for-one substitution of an electronic resource for a tangible one. Sometimes there is no electronic equivalent or the cost of switching from print to electronic access is prohibitive. In addition, we are still struggling with how to make our electronic reference collection apparent to users.

Although most users have been positive (or indifferent) about the weed, a few regular users have shown concern when discovering their favorite reference titles are no longer in the reference collection. We have had to assure several nervous faculty members that their favorite reference tools are still accessible.

The Future

The Mildred Miles Franks Reference Collection now encompasses 5 ranges of 60 shelves each on the second floor in Ekstrom Library. In the end, despite its compact size, we needed to move it off the first floor to make room for a renovation of the Library's Learning Commons. A

number of library staff have commented that the collection is easier to use and much more attractive. Titles that were hidden by outdated materials are now obvious and it is just much easier to find what we need. We are experiencing the same benefits listed by Francis: “a collection that better reflects the needs of the patrons, a more compact reference collection, staff more knowledgeable on the content of the collection, and the establishment of a process that will be regularly implemented” (2012, p. 227). The process of weeding and updating the collection will be much more manageable because we took the time to create a streamlined collection and a recipe for keeping it in that condition. We also believe that the streamlined collection coupled with the new collection development policy will make the collection easier to maintain and keep relevant for the users. The structure and operation of the reference department has significantly changed over the last decade and now our reference collection accurately reflects our new mission.

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