Rightsizing the Academic Library Collection

Suzanne M. Ward
Collections Strategist
Purdue University Libraries
West Lafayette, IN
Outline

• Understanding the past …
  – Past collection development practices
  – Use studies in academic libraries
  – Crowded shelves & traditional solutions

• … to manage the present
  – Rightsizing
  – Definition, challenges, action

• Q & A
“... we have plenty of time before we are faced with the problem of maximum size. But eventually that day will come.”

~ Howard F. McGaw (1956)
That day is upon us!
How did this happen?

*Traditional collection development*

- Availability window
- One major format
- No or slow ILL
- Just in case
The unspoken assumption

We must keep everything . . .

— In case somebody wants it

— Because we acquired it

— Because we are an academic library
However ..... 

“There isn’t room to shelve one more book!”
Space vs. Use
How do patrons use library spaces?
How are patrons using the physical collection?

- What do they use?
- How do they use it?
- Where do they use it?
- How much do they use?
- How much is seldom or never used? What is this material?
Why don’t patrons use some books?

• A. used till they fall apart

• B. Used when new
  – Interests change
  – Outdated
  – Newer titles better

• C. Never / seldom used
  – The “wrong” books
“Some behavioral patterns of library users: The 80/20 rule.”

~ Richard Trueswell, 1969

20% of the books account for 80% of the use.
The “long tail”

- Patrons use a few books a lot
- Patrons use many books occasionally
- Patrons never or seldom use some books
- 30%-50% of books never used
Life cycle

Product Life Cycle Diagram

Product Sales

Introduction  Growth  Maturity  Decline
User frustration

- Hard to find specific titles.
- Possible assumption that all library books are “good” books.
Impact of e-resources

- Quality varies
- Quick check vs. deep reading
- Disciplinary differences
- Coverage depth & breadth
- Different platforms
- DRM restrictions

**Result**: hybrid collections
So ... what can we do?

- Crowded shelves.
- Thousands of no-use & low-use books.
- Some electronic equivalents (mainly journals)
Traditional solution #1

Find/create more space elsewhere

- Attics
- Basements
- Storage facilities
- Warehouses
Guess what?

We’re all storing the **SAME** outdated, low-use/no-use books!
Traditional solution #2

Weeding
Weeding challenges

• Band-aid approach / crisis management
• Low-hanging fruit approach = “safe” choices
• Unevenly applied
• Few variables considered
• No coordination with partner libraries
Rightsizing ...

... is the strategic, thoughtful, balanced, and planned process whereby librarians shape the collection by taking into account factors such as:

- Disciplinary differences
- Impact of electronic resources
- Local program strengths
- Previous use (circ stats)
- Partners’ holdings
Rightsizing advantages

• Considers entire collection
• Rules-based de-selection
• Automate as much as possible
• Ongoing part of routine collection management
• Compare local collection to partners’ holdings

• Core value: enhance the user experience
Impetus for rightsizing

#1. Internal: Librarians acknowledge that something must be done. = time to plan a thoughtful, strategic approach

#2. External: Outside circumstances dictate action = strategic triage
Emotional response #1

Books as sacred objects
Emotional response #2

“I spent my career building this collection!”
Emotional response #3

“We spent millions of dollars buying these books and journals.”
Emotional response #4

“The faculty in my liaison department will be furious and will blame me.”
Emotional response #5

- Quantity = quality
- More is “better.”
Managing the emotions

• New environment
  – Patron needs
  – Use of space
  – New formats
  – Digital world

• Applying professional skills to de-selection

• Withdrawing items highly duplicated elsewhere
Rightsizing management

Purdue University

Chicago

Tippecanoe County, Indiana
Key components for success

- Administrative support
- Manager
- Employee buy-in
- Communications plan
- Milestones
- Iterative

- Collaborative approach
Policies & Plans

• Withdrawal policy
• Communications plan
• Rightsizing plan
  – Rules-based mass withdrawals (books)
  – Withdrawals against electronic holdings
  – Short runs
  – Collaborative endeavors
Choose your approach

• Go solo

• Joint storage facility

• Distributed print retention

• Combination?
“Keeper” libraries

• Top research libraries
• Regional/national resource
• High density storage
• Mission, staff & budget to retain items
• Collection against which other libraries withdraw & supplement
Planning phase

- Time constraints?
- Books or journals first?
- Multiple locations?
- Consultant?
- Costs?
- Special considerations?
- Identify partners?

- *Be strategic*
What to keep?

• **Journals**
  - No e-equivalent (usually)
  - Scarce titles

• **Books**
  - Own institution’s publications
  - Collections of distinction
  - Titles of regional interest
  - Certain gift books
  - Special collections titles
  - Scarce titles
  - Withdrawal criteria
Journals or books first?

- **Journals**
  - Electronic equivalents
  - No content is lost
  - Recover lots of shelf space
  - Users unconcerned
  - Bib record challenges
  - List development
  - Few exceptions

- **Books**
  - Check partner holdings
  - Circulation records
  - List development
  - Removing content
  - User concerns
  - Managing exceptions
Withdrawal criteria: books

Setting Thresholds

– Publication date cutoff

– Number of circulations within the last X years

– Holdings elsewhere:
  • State
  • Region / consortium
  • Country
Know before you start ...

- Material disposal
- Staffing
- Deadlines / timeline
- “untouchable” items
- Supplies
- Reporting requirements

- List generation
- List review requirements
- Procedures / workflow
- Troubleshooting
Test phase

- List development
- List review (optional)
- Pulling items
- Item disposal
- Catalog updates
- Communication channels
- Choke points
<table>
<thead>
<tr>
<th>Titles</th>
<th>ISSN</th>
<th>Library</th>
<th>Holdings</th>
<th>Proposed Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advances in carbohydrate chemistry</td>
<td>0096-5332</td>
<td>Life</td>
<td>v.1(1945)-v.23(1968)</td>
<td>wd all</td>
</tr>
<tr>
<td>Advances in catalysis</td>
<td>0360-0564</td>
<td>Engr</td>
<td>v.22(1972)-v.51(2007)</td>
<td>wd all</td>
</tr>
<tr>
<td>Advances in chemical engineering</td>
<td>0065-2377</td>
<td>Engr</td>
<td>v.1(1956)-v.32(2006)</td>
<td>wd all</td>
</tr>
<tr>
<td>Advances in inorganic chemistry</td>
<td>0898-8838</td>
<td>Chem</td>
<td>v.31(1987)-v.59(2007)</td>
<td>wd all</td>
</tr>
<tr>
<td>Advances in organometallic chemistry</td>
<td>0065-3055</td>
<td>Chem</td>
<td>v.18(1980)-v.43(1998)</td>
<td>wd all</td>
</tr>
<tr>
<td>Agricultural history</td>
<td>0002-1482</td>
<td>Life</td>
<td>v.1(1927)-v.73(1999)</td>
<td>wd all</td>
</tr>
<tr>
<td>AICHE journal</td>
<td>0001-1541</td>
<td>Engr</td>
<td>v.31(1985)-v.54(2008)</td>
<td>wd all</td>
</tr>
</tbody>
</table>
## List development: books

<table>
<thead>
<tr>
<th>Barcode</th>
<th>Mark X to keep</th>
<th>Title</th>
<th>Publisher</th>
<th>Call Number</th>
<th>Library</th>
</tr>
</thead>
<tbody>
<tr>
<td>32754063620698</td>
<td></td>
<td>Directory of germplasm collections.</td>
<td>IBPGR Secretariat</td>
<td>631.523074 lb6 v.1 pt.2 1985</td>
<td>life</td>
</tr>
<tr>
<td>32754063452597</td>
<td></td>
<td>Root and tuber crops /</td>
<td>IBPGR</td>
<td>631.523074 lb6 v.2 1986</td>
<td>life</td>
</tr>
<tr>
<td>32754063620680</td>
<td></td>
<td>Directory of germplasm collections.</td>
<td>IBPGR</td>
<td>631.523074 lb6 v.3 1990</td>
<td>life</td>
</tr>
<tr>
<td>32754063257129</td>
<td></td>
<td>Directory of germplasm collections.</td>
<td>IBPGR Secretariat</td>
<td>631.523074 lb6 v.4 1982</td>
<td>life</td>
</tr>
<tr>
<td>32754063694693</td>
<td></td>
<td>Directory of germplasm collections.</td>
<td>IBPGR</td>
<td>631.523074 lb6 v.6 pt.2 1989</td>
<td>life</td>
</tr>
<tr>
<td>32754078903816</td>
<td></td>
<td>Forest fires : a reference handbook /</td>
<td>ABC-CLIO</td>
<td>634.9618 Om5f 2005</td>
<td>life</td>
</tr>
<tr>
<td>32754064132271</td>
<td></td>
<td>The gardener's directory.</td>
<td>Hanover House</td>
<td>635.9 St45g</td>
<td>life</td>
</tr>
<tr>
<td>32754070355460</td>
<td></td>
<td>Sunset western garden book /</td>
<td>Sunset Pub Corp</td>
<td>635.90978 Su74s 2001</td>
<td>life</td>
</tr>
<tr>
<td>32754071754620</td>
<td></td>
<td>Storey's guide to raising poultry /</td>
<td>Storey Books</td>
<td>636.5 M536s 2001</td>
<td>life</td>
</tr>
<tr>
<td>32754074082888</td>
<td></td>
<td>The low maintenance garden /</td>
<td>Firefly Books</td>
<td>712.6 B459L 2000</td>
<td>life</td>
</tr>
<tr>
<td>32754067410278</td>
<td></td>
<td>Fish technology centers : directory.</td>
<td>US Fish and Wildlife Service</td>
<td>49.104:F 52</td>
<td>life</td>
</tr>
</tbody>
</table>
Full production

- Training
- Troubleshooting
- Workflow checks
- Milestones & progress reports
- Assessment

- Party time!
Rightsizing is ongoing & iterative

- **Books**: set the next date
- **Journals**: when new e-backfiles added
- **Other**: microforms? A/V? E-resources? Government documents?
Mistakes are inevitable . . .

. . . but not the end of the world!

These are low-use items widely held elsewhere.

Borrow or buy as needed.
Result

**VIBRANT ACTIVE LIBRARY**

- new spaces
- new services & equipment
- uncrowded shelves full of relevant titles
- happy patrons
Shameless plug

• American Library Association, 2015.
Questions?