Collection Management
WLA Presentation – September 28, 2012
Cameron Duff

Collection Management:
Steps to Help Maintain Your Library’s Collection

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Wyoming Library Association
September 28, 2012
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Overview

• Concepts versus In-depth Training
• Collection Development Policy Guidelines
• Budget Preparation
• Selection Process
• Cataloging
• Weeding
• Inventory
• Year End Cleanup

Policy Guidelines

Why is it important to have a Collection Development Policy?

Have you ever seen your library’s policy and do you follow it?

Is the public allowed to view the policy?
http://www.sheridanwyolibrary.org
Budget Preparation

Focus only on the different material or item types that your library might use rather than how those dollars are being allocated.

Do you purchase materials across all areas of the library?

Are you sure?

Sample Planning Tool

Selection Process

Understand your vendor options

- State Library (Ingram, Baker & Taylor, etc.)
- Secondary Vendors: BWI, Amazon, Midwest Tape, Recorded Books, Local Bookstores, Leasing Companies, etc.
- Take advantage of the discounts available to your library.
- Understand how fulfillment rates and shipping costs affect your order.
Selection Process

Take advantage of tools at your disposal

- Ingram - ipage
- Baker & Taylor - Title Source 3
- Forthcoming Titles, HIT Lists, Standing Order Plans, etc.
- Book Review Sources
  - Library Journal, School Library Journal
  - Booklist, Publishers Weekly, etc.

Selection Process

Patron Suggestions or Requests

- Popular vs Traditional titles
- Are you purchasing titles that your community wants or are you only focusing on what you have traditionally purchased?
- Remember that staff suggestions should be considered just as much as patrons suggestions.

Selection Process

Plan for the Future....

- Anticipate new materials and how they might be integrated into the collection.
- Remember that Cassettes, CD's, VHS, DVD's and eBooks have all at one time or another been considered "new" and controversial formats for Public Libraries.
- So what types of materials will be next!!!
CATALOGING

Ensure that you have cataloged your materials correctly and efficiently.

Can the public find what they are seeking while still maintaining accepted cataloging principles?

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WEEDING

Why should we “Weed” the collection?

CREW and MUSTIE

Sample Weeding Guidelines Handout

Thirteen Steps to Weeding Success

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WEEDING SCHEDULE
INVENTORY

Have you ever conducted an inventory of your library collection?

Does it even matter?

YEAR END CLEANUP

So, What's Left?

- Clean up any records including purging older lost, missing, or damaged titles.
- Roll over "on order" items and budget amounts to the new fiscal year. (State Library may be responsible for this step)
- Take a step back and review what worked and what didn't over the past year and don't be afraid to make changes.

QUESTIONS???

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CHECKLIST OF CREW WEEDING FACTORS*

For all materials consider:

___ Physical condition
___ Copyright date
___ Author
___ Publisher
___ Format
___ Currency and accuracy of content
___ Circulation – especially during the past 2 years
___ Duplication – Are there additional copies in the collection?
___ Other books on the same subject in the collection?
___ Expense of replacement/repair/rebinding
___ Relevance of subject to community
___ Potential use
___ Importance
   • A standard title?
   • A classic or seminal work?
   • Identified in standard tools as something to keep?
   • An award-winner?

* CREW = Continuous Review Evaluation and Weeding

SCPL – CKD

October 2011
**M U S T I E: A Quick Weeding Tool**

**M** Misleading (and/or factually inaccurate)

**U** Ugly (worn and beyond mending or rebinding)

**S** Superseded (by a truly new edition or by a much better book on the subject)

**T** Trivial (of no discernible literary or scientific merit; usually of ephemeral interest at some time in the past)

**I** Irrelevant to the needs and interests of your community

**E** The material or information may be obtained expeditiously Elsewhere through interlibrary loan, reciprocal borrowing, or in electronic format.

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*CREW = Continuous Review Evaluation and Weeding*


SCPL – CKD  October 2011
Advantages of weeding:
- Improves staff’s knowledge of collection.
- Identifies sections that need to be replenished.
- Identifies cataloging and/or collection assignment problems.
- Clearing out the old stuff increases circulation.
- Decreases staff costs, increases display space, improves image of library in community.

Criteria for weeding Fiction:
- Last checkout – book has not circulated in 3 years.
- Books that have circulated in the past three years but have circulated poorly during ownership.
- Number of checkouts – items with high checkouts may need weeding for condition.
- Condition – regardless of number of checkouts, books in poor condition should be weeded.

Special considerations for Fiction – IF IN GOOD CONDITION:
- Part of a series – hard to tell especially on #1 – replace if in poor condition.
- Award winner or award winning author.
- Not available elsewhere in the district.
- International or multi-cultural author that was recently added.
- Local or regional author or content.
- Short stories, seasonal stories, and some genres circulate less.

Criteria for replacing books:
- Titles with high circulation that are weeded for condition
- The Title is NOT available elsewhere in the Sheridan County Public Library System. Check Workflows for the title and author (not just ISBN) at another branch. Additional copies may be in a different collection, i.e. YA versus Fiction.

**Ongoing/Daily Weeding Procedures**

The ongoing process of weeding the collection occurs whenever a library staff member comes across library materials that are in poor physical condition or are superseded by a newer edition or title. When this happens, please follow these procedures:

1. Consider the *Checklist of Crew Weeding Factors and Thirteen Steps for Weeding Success* throughout the weeding process.

2. If necessary, suggest a replacement title to the appropriate department head or branch manager. You may also email staff with suggestions to fill gaps in specific subject areas.

3. Change the status of the item in Workflows, stamp the book with a DISCARD stamp and place on the Book Sale cart or recycling bin.
Systematic Annual Weeding

Please refer to the SCPL Annual Weeding Schedule to ensure that the entire collection is examined at least annually so that outdated, worn, and inactive materials are removed from the collection. This process also provides a periodic examination of the collection so that subject area gaps are replenished. A weeding list covering the appropriate subject areas will be generated each month to assist with the process. If you need assistance with your weeding project, please ask the Director.

The weeding process is as follows:

1. The staff member in charge of the current month’s subject area will be responsible for generating weeding lists and ensuring that the weeding schedule is followed. Any questions should be directed to the person in charge of that subject area or to the Director. Weeding lists should be returned to the person in charge upon completion of the particular weeding project.
2. Change the status of items removed from the shelf in Workflows.
3. Consider the Checklist of Crew Weeding Factors throughout the weeding process. Ask your assistance from a co-worker if you are unsure whether to weed a particular item.
4. For each item, decide whether to weed, repair, or return to the collection.
   a. If you decide to weed the item and wish to order a replacement copy, check to see if an appropriate replacement is still able to be purchased. Stamp the book with a DISCARD stamp and place on the Book Sale cart or in the recycling bin.
   b. If you decide to have a book repaired, place it in the appropriate area in Technical Services. If it is a DVD, video, audiobook, or CD, send it to Technical Services for new cases, new barcodes, scratch removal, or evaluation to see if it can be repaired. You may also place a note on the item suggesting it be replaced if it cannot be repaired.
   c. If you decide to return it to the collection, be sure that the status has been changed in Workflows.
5. The last step is to ensure that any item weeded has been removed from Workflows or at least the status has been changed in the Global Item Modification tab to reflect that the Item Type and Home Location are listed as “Discard”
6. If a replacement copy with a new ISBN has been re-ordered, the bib record remains in the system until the new item is acquired and attached to the bib record.
SCPL Thirteen Steps for Weeding Success

1. **Get an empty book cart and assemble weeding materials:**
   Weeding list report from Director’s Station; pad of paper for notes regarding replacements.

2. **Go to the area of the collection where you are going to weed. Study the area as a whole.** What is your impression? Is this a heavily used area of the collection? Look for items that are obviously in poor condition. Guess at the average age of the collection based on appearance alone. Do you see new materials scattered throughout?

3. **Think about your subject area.** Are there obvious subject gaps? Jot down some notes for later if it will be helpful to you. Are there titles that you think SCPL should own, but are absent from the shelf?

4. **Handle the books.** Pull materials from the shelf. Open each item, consider the condition. Read the blurbs on the back or covers. Look at the title page. Look at the author information. With some titles you can make immediate decisions; other titles will require more time. Some titles can go back on the shelf immediately. Sort items by obvious weed and materials that need further consideration on the cart as you go. Once your cart is full, move to a work area where you have access to a computer. A non-public area is preferred.

5. **Examine items you have pulled – one at a time.** Open the book, flip through the pages. Is the spine damaged? Any repair needs? Is it an obvious weed just by examining the condition? Do you have a report that gives the circulation statistics? Is it obviously outdated -- or an older edition? Use the MUSTIE criteria.

6. **Measure the item against community needs and its value to the collection.** Note the copyright date of the book. Look at the content, illustrations, table of contents and index. Read through some of the text. Who is the author? Is the publisher a trusted source? Was it published by a small, specialized press? Is the item unique or does it offer unique content?

7. **Make notes, as needed, about individual items, authors or subjects and write down other observations, comments, and questions.** This takes time but it will help you as you make final weeding decisions – and it will be important information when it comes time to select replacements or do collection development in this area of the collection.

   Some examples of notes:
   “nothing by Freud or Jung”
   “need new/more stuff on estate planning”
   “which philosophers should we have?”
   “check Dick Francis title – out of print?”
   “needs new spine label”
   “significant author, listed in Public Library Catalog”
   “title won Booker Prize”
   “very low use”
SCPL Thirteen Steps for Weeding Success

8. Review the item record and the full catalog record. How many total circulations has the title had? What is the circulation count for that title for one year? For two years? How many copies are there in the system? How many copies should we keep at SCPL? What other materials on this subject is available at another branch?

9. If necessary, check your subject tools or standard indexes. Is it a standard work? Should SCPL have one or more copies? Is it an award winner? Is it indexed in a standard source like the Fiction Catalog or the Public Library Catalog?

10. Check IPage, Amazon, and/or other sources. Is there a review? Is it still in print? Is there a newer edition available? Are there newer titles that would make this obsolete?

11. Make a decision to do one of the following:
   - Keep all copies; return copy to the shelf
   - Keep only some of the copies; weed the remainder
   - Repair or rebind
   - Discard all copies (or some copies)
   - Check for more information

12. Put weeded items where others can review your decisions. Keep notes with items so others can understand your decisions.

13. Send notes about subject gaps, selection suggestions, etc., to the Librarian or Department Head assigned to that specific subject area.
## 2012 SCPL Annual Weeding Schedule

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