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ABSTRACT

In the fall of 2018, Penn State Libraries took the first step in responding to a library committee recommendation to rightsize the collection at the University Park campus in preparation for renovations taking place over the next four to five years. A collaborative weeding project involving items with Z LoC classification began in an effort to establish criteria and processes that could pave the way for future weeding projects and processes for weeding on an ongoing basis. This article explores Penn State Libraries' effort to engage in a collaborative weeding project focused on a collection that has great relevance to the profession.

Introduction

Libraries and archives have many terms to express the concept of reviewing existing print collections and removing items: weeding, reappraisal, rightsizing, deselection, discarding, deaccessioning, and withdrawing. Whichever term a library chooses to use, the end result is the same: materials are removed from the collection and their records are removed from the catalog. The process can be controversial, emotional, and fraught with pushback or avoidance. It can also be difficult for libraries to reach consensus on the criteria used to make the decisions or the need to weed at all. The expectation of what a library collection should be is subjective, with many libraries having varying or conflicting opinions within the organization. However, in many cases libraries have no choice: they have run out of space or they are receiving a directive to repurpose space, so the collection must be reduced.

In 2018, Penn State University Libraries (PSUL) was preparing for renovations in the Pattee/Paterno Library complex on the University Park campus, and library administration charged a group called the Collection Reorganization Working Group to examine the current layout of the physical collection and recommend an optimal arrangement. Through the process of carrying out that charge, the group noted that the collection in the Pattee/Paterno complex had exceeded its ideal capacity and needed to be reduced to allow for growth. In addition to the collection in Pattee/Paterno being larger than preferred, remote storage had also reached capacity. Sending materials to remote storage was no longer an option. A major weeding project had not taken place in the Pattee/Paterno Library in years, and a starting point was needed in order to build buy-in from stakeholders and establish a consensus on weeding criteria. In the process of determining how to begin a weeding project and establish processes, the author developed the following questions: How can PSUL establish weeding criteria and build consensus around that criteria? How will PSUL address cases where there is disagreement about how to apply that criteria? How will PSUL define success in a weeding initiative? This article focuses on a collaborative weeding project that was carried out as a starting point to addressing the Collection Reorganization Working Group recommendation to reduce the collection in Pattee/Paterno and aimed to answer the author's questions to enable future projects.

Literature review

According to Ward, "One of the major reasons why librarians now face the need to tackle huge rightsizing projects is that they have deferred for decades what should be routine periodical analysis with strategic withdrawals as an ongoing part of collection management."[1] Ward goes on to note the inherent challenges in planning for future historical research and the inability to foresee what will actually be needed in that future research.[2] Planning for future needs is what drives collection development in many academic libraries; many selection decisions are made with the "just in case" philosophy in mind. Also, academic disciplines have different needs with regard to age of content – scholars in arts and humanities likely value older content while scholars in the sciences often use newer content. However, as titles remain on the shelves for decades without circulating, it becomes difficult to rationalize occupying so much space with things that get such little use.

Librarian angst and the difficulty of weeding both on the part of selectors and those driving the weeding projects are a prominent theme in the literature. Jankowski, Schultz, and Soito state, "Stress and aversion associated with making withdrawal decisions have been documented not only in libraries but across other collection-based professions."[3] McHale et al. describe a project involving multiple methods of weeding and begin their article with the line, "The practice of weeding in libraries is a historically contentious topic both within the professional community and among the general public."[4] While referring to products such as SCS/OCLC's GreenGlass, McHale et al. go on to say, "Although Librarians are relieved that some of the burden can be removed from this dreaded job, there are concerns about allowing an algorithm to make final decisions about what to keep and what to withdraw."[5] Collections and access to information are fundamental library service. For some, it can be seen as an affront to the values of librarianship as a profession. It also forces libraries to re-evaluate the collection development choices made in the past, which can be uncomfortable or even insulting.

A related theme that also appears in the literature is the need to repurpose library space is often the driving force behind large withdrawal projects. Maintaining a service such as a collection of material that is freely available to the public is foundational to libraries and the profession of librarianship, so it is understandable that there is a tension between maintaining that foundational service and adjusting library service models to address the evolving nature of user needs. And the tension is not only coming from within. There have been recent examples of public backlash against libraries that engaged in large-scale weeding projects. In 2015, protesters gathered outside of Berkeley Central Library to voice concerns about weeding the collection. According to Paris, "The protesters, many former librarians themselves, said they are in favor of weeding but upset with how the process has been carried out – particularly the fact that the responsibility has been stripped from the specialist librarians."[6] Trust is a key component in weeding projects. Librarians and library staff need to trust the reasons behind weeding initiatives, the process, and the criteria. Users need to trust the libraries and the librarians.

Indiana University of Pennsylvania Libraries (IUP) is another example of a library coming under scrutiny for weeding. In 2017, IUP publicized a plan to withdraw 172,161 of the 486,000 books in the collection.[7] "Library 'weeding'? Or 'clear-cutting'?" read the title of an article in *The Hawkeye Online News*, and that article explores the disagreements over the weeding process and criteria and includes the following quote from and IUP librarian: "The criteria ignore the condition of books and the expertise of the university's librarians."[8] Given the fact that there are pressures to maintain library collections internally and externally, it is unsurprising that a great deal of the literature focuses on the methods or criteria used to make deselection decisions. In McAllister and Scherlen's piece, "Weeding with Wisdom: Tuning Deselection of Print Monographs in Book-Reliant disciplines" the authors state:

> The library literature on deselecting university collections, however, can be confusing and inadequate, often leading to the adoption of criteria that disadvantages the more book-reliant disciplines. Therefore, academic librarians need to consider qualitative criteria for deselection that is fine-tuned throughout the process to be sure that they are serving the best interests of book-reliant disciplines, such as those in the humanities.[9]

While deselection decisions need to be made with care, each library must make decisions on what criteria to use based on many factors that are unique to the institution. One institution may have the luxury of keeping low or no use materials because they serve or may serve "book-reliant" disciplines at some point in the future, but many institutions face space constraints and the burden of relying on circulation counts to justify space and funding needs. Ackerman and DeLuca describe the results of a survey on weeding practices: "Among all respondents the top votes were outdated material (23%), duplicate copies (20%), low circulation (19%), and item condition (19%)."[10] Busch, Nance, and Teague describe narrowing lists of potential withdrawals call number ranges, publication year, and number of circulations.[11] Burke and Kilb discuss criteria including items purchased before 2006, ubiquity, and recent circulation activity.[12] DeMars, Roll and Phillips also cite recent circulation activity and ubiquity as criteria used in deselection decisions at California State University, Fullerton. There are enough common criteria appearing in the literature to show obvious themes but enough differences to prove that there is no unanimously perfect way to weed a collection.[13]

In addition to criteria, methods used are also a frequent topic explored in the literature. Some libraries license GreenGlass – a tool developed by Sustainable Collection Services and later purchased by OCLC that allows libraries to compare their MARC holdings to the WorldCat database.[14] Some libraries create entirely new internal systems, some simply browse the shelves and grab volumes – referred to as "weeding by walking" by McHale et al.[15] Regardless of whether or not there is a universally agreed upon method, public acceptance, or desire to weed, collections cannot grow unchecked forever, and measures have to be taken at some point.

Background

Penn State University Libraries (PSUL) consists of 36 libraries (including branch libraries) at 24 campus locations across the state of Pennsylvania. In June of 2017, the Collections Reorganization in Pattee/Paterno Working Group (CRPWG) was charged with "assessing user needs, collection use, and upcoming building changes; and proposing a collections organization for Pattee/Paterno Libraries" at the Penn State University Park campus. University Park is Penn State's flagship campus, and as of fall 2019 had a full time equivalent of approximately 45,000. The Pattee/Paterno complex is the main library building on the University Park campus and at the time of this writing holds approximately 1,623,358 volumes with the item type "book" and 499,816 with the item types "serial" or "periodical." The current capacity for general collections in Pattee/Paterno is 2,344,440 inches. CRPWG's final report was intended to inform decisions relating to architectural moves planned for the next four to five years. The group reviewed circulation data to determine what collections were highly used and gathered library-wide feedback on issues related to the physical collection through an online survey.

With a collection as large as PSUL's, the act of weeding does not take as long as shifting the collections to realize the space that weeding yields. Identifying titles for deselection and removing them from the shelves is one step, but creating usable space requires touching and moving each remaining book on the shelves. With this in mind, one of the recommendations in the CRPWG report was to engage in strategic weeding to make shifting and moving of collections easier as well as to reach a collection density that is appropriate for the existing space and allows for growth as new titles are added to the collection. In an effort to carry out this recommendation, the author coordinated a collaborative rightsizing project that focused on titles with Z call numbers – BIBLIOGRAPHY. LIBRARY SCIENCE. INFORMATION RESOURCES (GENERAL). While there is a selector responsible for purchasing Library Science titles, items with Z call numbers had not been weeded in several years, and a group approach seemed appropriate given the age, breadth, and depth of the collection. Historically, it was a collection that belonged to everyone, so no individual had been appointed to review titles for withdrawal.

Deselection criteria

At the time this project began, PSUL had a committee called the Joint Collections Group which consisted of representatives from subject libraries, Cataloging and Metadata Services, Access Services, Acquisitions Services, and the Commonwealth Campus Libraries. The author drafted deselection criteria based on a combination of discussions in CRPWG regarding circulation and literature on deselection and presented the criteria to the Joint Collections Group for feedback.

It was a happy coincidence that the Zs were in a location that was key to shifting collections in the Pattee/Paterno complex. This collection had some kind of relevance to all librarians involved – either because the content relates to their area of subject responsibility or it has significance to them as professionals. The foci of these titles also made it appropriate for librarians in technical services to be involved in weeding decisions when they are typically not involved in deselection. Due to the wide range of expertise involved, discussions that lead to establishing a consensus for deselection criteria were rich and complex with each area involved relating to the content in different ways. For example, the Head of Access Services was able to contribute information about resource sharing and the importance of relationships with interlibrary loan availability. Cataloging and Metadata Services were concerned about maintaining titles that are valuable tools for their work or hold historical significance for their area of the profession. Librarians from Arts and Humanities were interested in establishing criteria that addressed the need to maintain content related to English literature while librarians in Social Sciences and STEM were largely focused on potential use by students and teaching faculty and age of the content.

With the breadth of perspectives involved, it was important to establish deselection criteria that addressed everyone's concerns. And in light of the backlash other libraries such as Berkeley Central Library and Indiana University of Pennsylvania received for weeding projects, the Joint Collections Group was acutely aware of the need to establish consensus on criteria and deliver a cohesive message to users. The criteria were finalized after thorough review and discussion by the Joint Collections Group and included the following:

- **Circulation** – Titles/copies that have not been checked out in the last ten years will be candidates for withdrawal.
- **Widely held/Held at peer institutions** – Titles held by more than 20 other institutions will be candidates for withdrawal. If there are 20 or less institutions holding the item, institutions in North America are considered likely ILL partners.
- **Publication Date** – Titles published 20 or more years ago will be candidates for withdrawal
- **Research Value** – Titles that hold unique significance to a specific research area should be retained

The criteria were intended to define the parameters of the review while also allowing the flexibility to consider things like interlibrary loan availability and unique value of individual titles. Members of the Joint Collections Group were primarily concerned with making decisions based on use and demand of the materials – whether it be use from students, faculty, or librarians. The Joint Collections Group also wanted to avoid withdrawing materials that was scarcely held, and selectors in different subject areas shared the holdings thresholds they typically use when making weeding decisions. When the Head of Access Services provided input on interlibrary loan availability, the group agreed that specific holding libraries would be investigated if an item had fewer than 20 holding libraries in North America. The "Research Value" criterion was deliberately left vague to provide the ability to use expertise to determine if an item should be retained despite meeting the criteria. Members of the group also expressed interest in having information regarding reliable online access to titles. In an effort to respond to that need, the author obtained information on HathiTrust availability for reference titles in the Paterno Family Reading Room, and the Joint Collections Group agreed that selectors would be responsible for

investigating online availability for other titles. There was no target for withdrawal in this project, and there was no plan to review decisions against the criteria. The author wanted to instill trust in the process as this was a low stakes starting point for future weeding projects.

Gathering and manipulating data

PSUL's integrated library system (ILS) is SirsiDynix Workflows and PSUL subscribes to SirsiDynix's collections reporting tool, BlueCloud Analytics (BCA). At the time of this project, PSUL had not licensed any additional collection assessment tools such as OCLC/SCS's GreenGlass. PSUL was part of a pilot with the Pennsylvania Academic Library Consortium (PALCI) that involved the Colorado Alliance's Gold Rush tool, but it was not used in this project. The Zs were held in two locations: The Paterno Family Reading Room which held 3,502 items and the Pattee stacks which held 20,152 items. There is a substantial number of books with Z classification in PSUL's remote storage facilities, but those were not reviewed as part of this project.

The author obtained shelf lists of books with Z classification from BCA and consulted with staff in Cataloging and Metadata who were able to batch search the OCLC numbers from the BCA shelf list using the OCLC Z39.50 server to determine the number of other libraries holding the item in WorldCat. That data then had to be merged with the original shelf list obtained from BCA so that one list with WorldCat holdings, circulation data, and bibliographic information could be given to selectors for review.

The author reviewed and manipulated the lists before giving them to selectors. The items in the Paterno Family Reading room included sets such as the National Union Catalog, pre-1956 imprints, Catalog of Printed Books of the Folger Shakespeare Library, General Catalogue of Printed Books, and many others. The original BCA shelf lists showed each volume for these sets on a separate row, and the author collapsed entries with multiple volumes into one to simplify the review. This reduced the list for the Paterno Family reading room to 214 titles. The author also created a column after the bibliographic information to include the retention/withdrawal recommendation based on an initial application of the deselection criteria. So "retain" or "withdraw" was entered on the spreadsheet based on a "first pass," and selectors only had to review the lists for exceptions. The lists were sent to members of the Joint Collections Group in January of 2019 with the expectation that they would be shared with others in their units. The lists were reviewed by selectors in all of PSUL's subject libraries which at the time of this project included: Arts and Humanities (eight reviewers), Life Sciences (five reviewers), Physical and Mathematical Sciences (two reviewers), Social Sciences and Education (six reviewers), Engineering, and Earth and Mineral Sciences (two reviewers). Representatives from the Commonwealth Campus Libraries (three reviewers) and Cataloging and Metadata Services (seven reviewers) also reviewed the lists. Each group accessed the shelf lists from a shared folder in the cloud storage application, Box, and downloaded a copy to record their recommendations. The reviewers were given two months to go over the lists. The author received a copy of the list from each group with their recommendations and compiled all of the recommendations into one for the staff in Access Services.

Data limitations

For serials, the batch searching via the OCLC Z39.50 server only retrieves title-level holdings. Additional searching had to be done to determine what volumes were held at other libraries if selectors had questions about the initial retention/withdrawal recommendation. Also, the BCA shelf lists did not show duplication. Reducing duplication is a strategic initiative at PSUL, and the shelf lists obtained from BCA did not indicate if titles were also held at other PSUL locations, so duplication wasn't considered in the deselection criteria. Also, the batch searching method could not retrieve results when it encountered entries on the initial shelf list that had no OCLC number or multiple OCLC numbers.

Table 1. Pattee stacks.

Total Number of Items	20,152
Number of Items Retained	11,086
Number if Items Withdrawn	9,066

Table 2. Paterno family reading room.

Total Number of Titles	214
Number of Items Retained	63
Number of Items Withdrawn	151

Some data cleanup was needed through manually searching items in WorldCat to obtain the number of holdings. Also, in the time between the review of the shelf lists and the physical removal of withdrawn items, PSUL committed to retain approximately 105,000 titles as part of the HathiTrust Shared Print Retention program. Staff in Access Services checked each title marked for withdrawal for the HathiTrust retention note before removing the item from the collection.

Results

Of the 20,152 items in the Pattee stacks, 55% were retained and 45% were withdrawn. 5,236 items had selector retention/withdrawal recommendations that differed from the initial recommendation based on the established deselection criteria (largely recommendations to retain over the initial withdrawal recommendation (Table 1).

The majority of these exceptions were requested by selectors in the Arts and Humanities subject library and the items in question were author bibliographies. Years ago, PSUL began the practice of assigning call numbers to author bibliographies that would place them with the authors' works, but items already in the collection were not reclassed to align with this practice, so many remained in the Zs. The results in the Paterno Family Reading Room differed from those of the Pattee Stacks which was likely due to the nature of the content held in that location (i.e. large sets of reference materials (Table 2).

Of the 214 titles in the Paterno Family Reading room 70% were withdrawn while 30% were retained. Nineteen titles had selector recommendations that differed from the initial recommendations based on the established criteria. In cases where reviewers provided recommendations that conflicted with each other, the item was retained. In all cases, the reviewers' recommendation was accepted over the recommendation included by the author solely based on the established criteria.

Conclusion and future steps

When starting this project, the author set out to answer questions regarding how to establish weeding criteria and build consensus as well as how to define and achieve success in with a deselection project. One of the key factors in helping the process move forward was providing a starting point for participants to work with. Drafting criteria and providing it to stakeholders for review enabled productive discussions. Assuring participants that the initial criteria was only a draft and delivering on the promise to revise and listen to concerns seemed to help build trust in the process and ultimately consensus was achieved through dialog. The fact that selectors were assured that exceptions could be made to the established criteria also seemed to ease minds. This project was considered a success overall – weeding criteria was established, agreed upon, and adhered to, and a significant number of items were withdrawn from the collection. The number of exceptions requested did not seem unreasonable, and there was classification-based justification for many of them. The project also yielded important lessons for future projects. The Zs were chosen partly due to the fact that they were in a key location for shifting the collections. Weeding based on location in a large academic library can

have the unintended consequence of preventing a holistic approach to deselection. Data from every location would need to be incorporated to find potential duplicates. In the fall of 2019, the same processes and deselection criteria were used to review the Z oversize material in the Pattee/Paterno complex. This project ran smoothly since many of the stumbling blocks had been identified from the initial project and removed in this new iteration. Review of Z classified items in Pattee/Paterno is considered complete at this time, but future collaborative deselection projects will likely include looking at books with Z classification currently held in remote storage. The Zs projects are unique in that all subject areas reviewed the lists along with librarians in technical services. This resulted in criteria that was thoroughly vetted; however, future projects will likely be focused on specific subject areas with fewer reviewers. The established criteria may need to be adjusted depending on the subject area.

While the literature suggests a widespread fear or dislike of weeding, ultimately, deselection is as important as selection. Choosing what to remove from the collection should be done with the same thoughtful consideration as choosing what to purchase. Library users and sometimes staff within libraries may like the idea of libraries keeping everything forever. However, there are many costs involved in maintaining physical collections. There are monetary costs associated with processing, repair or replacement, as well as building temperature and humidity controls. There are also opportunity costs. Very few libraries have unlimited space for collections. If keeping older books on the shelves prevents libraries from having space for new content, users are not being served. Providing collections as a service requires periodic weeding and weeding requires trust. In order for a weeding project to succeed completely, librarians and users alike need to trust that weeding is being done for the right reasons, and the right considerations are being made. Collections require a great deal of care over time, and the collection is best cared for when its stewards come together and collaborate with its best interests in mind.

Notes

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3. A. Jankowski, A. Schultz, and L. Soito, "Motley Crew: Collaboration Across an Academic Library to Revive an Orphaned Collection," *Library Resources and Technical Services* 62, no. 3 (2018): 115.
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Disclosure statement