

LIBR 580

Collection Management

Unit 10

Laurie Prange (Prange-Martin)



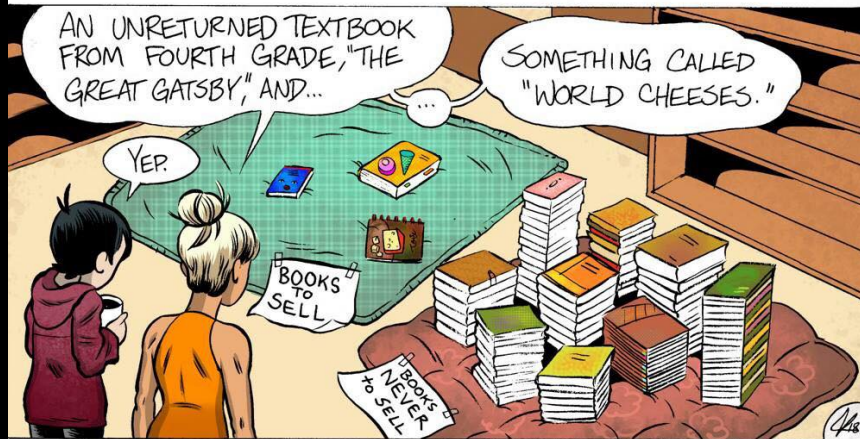
Agenda

- Focusing Activity
- Taking attendance
- Lecture –
 1. De-Selection and Weeding
 2. More on writing polices
 3. More considerations on selecting for your collection
 4. Analyses and Accountability
- Learning Consolidation – Activity: Snowstorm
- Next Steps

Focusing Activity



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Taking attendance



Lecture =

1. De-Selection and Weeding
2. More on writing policies
3. More considerations on selecting
for your collection
4. Analyses and Accountability

De-Selection and Weeding



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Weeding (all weeding)
listed as #3 on a list of Top 20
Library Scandals in Recent
History by John Hubbard, May
10, 2017

<https://medium.com/@hubbard/top-20-library-scandals-in-recent-history-bf237e1025b2>



#3 Weeding: Our Dirty Little Secret

<https://medium.com/@hubbard/top-20-library-scandals-in-recent-history-bf237e1025b2>

There comes a time when an item on a library shelf will never again be read. And this point could actually arrive immediately upon it being first parked there, especially if you're in a research library. Regular deselection of these materials from a library's holdings is therefore a natural and necessary component of responsible collection management. Nonetheless, for some reason it makes for splashy headlines and even protests when this practice is discovered. In 2016, bibliomaniacs at a Florida public library went so far as creating fake circulation records to avoid data-driven weeding practices and also possibly boost their funding.

It's all about transparency!



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Transparency, as used in science, engineering, business, the humanities and in other social contexts, is operating in such a way that it is easy for others to see what actions are performed.

It has been defined simply as the perceived quality of intentionally shared information from a sender.

Transparency implies openness, communication, and accountability. Transparency is practiced in companies, organizations, administrations, and communities.

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To increase transparency,
managers actively infuse greater
disclosure, clarity, and accuracy
into their communications with
stakeholders.

All draft documents, all arguments for and against a proposal, all final decisions, and the decision making process itself are made public and remain publicly archived.

People who are interested in a certain issue will try to influence the decisions.

Transparency creates an
everyday participation in the
political processes by media and
the public.

One tool used to increase everyday participation in political processes is freedom of information legislation and requests.

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21st century culture affords a
higher level of public
transparency than ever before,
and actually requires it in many
cases.

Due to the digital revolution, people no longer have a high level of control over what is public information, leading to a tension between the values of transparency and professional choice when it comes to weeding.

Four Approaches

- CREW = Continuous Review, Evaluation, Weeding
- MUSTIE = Misleading, Ugly, Superseded, Trivial, Irrelevant, Elsewhere
- MUSTY = Where Y “Your collection has no use for this book”
- WORST = Worn out, Out of date, Rarely used, System cannot support, and Trivial (faddish)

Weeding Policy

- Alternative names: De-Selection Policy, Policy Statement, Collection & Management Plan
- Varies across libraries; may not exist in small or special libraries
- Purpose: provides management framework with concerns of removing items from the collection, legal parameters, client negotiation tool, staff training tool, standards for weeding, communications re: collection scope, continuity re: staff changes, budget distribution tool, handling shifting formats
- Authors = usually subject librarian
- Public relations = usually designated Collections Library or top librarian position

Parameters (1)

- Describe the library's user community, define the institutional mission of the library, identify the user's needs
- Provide weeding criteria and guidelines for those charged with weeding
- Identify weeding tools and processes
- Identify processes for weeding, cancellation, storage, replacement
- Establishes responsibilities (development, management)
- Guidelines (complaints, gifts, space allocation, access, budgeting, fundraising)

Parameters (cont'd)

- Protecting intellectual freedom, challenge form
- Informing governing bodies
- Rationale for library practices
- Clear principles for decisions regarding accusations of bias and irresponsible behavior
- Protection from those who insist libraries and archives take and keep everything
- Protection from an expectation of doing more with less

Finding more E-Resources

WebJunction	https://www.webjunction.org/? redirect=true
LibraryJournal	http://reviews.libraryjournal.com
Infomine	http://infomineucr.blogspot.ca
ScoutReport	www.scout.wisc.edu/Reports/ ScoutReport/Current/

Unique Concerns for Weeding e-Resources

- Print vs. e-resources: cancellations, duplications
- Remote access viability
- Justification: hardware, supplies, cost re: network
- Negotiation of licenses, legal considerations (e.g., seating)
- Preservation and long-term access concerns
- Performance: platforms
- Staff training
- Cooperative collection development

E-Resources Life-Cycle

- Pre-planning: organizational issues
- Acquisitions
- Licensing
- Web Presentation
- Usage
- Maintenance
- Preservation and archiving
- Review

Elements of Weeding Policy

- Signature page
- Table of Contents
- Statement of Purpose
- Background Statement
- How Weeding responds to the needs of Target Audiences
- Budgeting, Funding
- De-Selection and Weeding Criteria: general, specific
- Analysis of Subject Fields:
 1. Classed/Conspectus
 2. Narrative

Analysis of Subject Fields: Classed/Conspectus

- An overview or summary of collection strength and collecting intensities – arranged by subject, classification scheme, or combination of either, and containing standardized codes for collection or collecting levels and languages of materials collected. Describes the collection – current and future levels
- Research Libraries Group (RLG) Conspectus
 - 0=Out of Scope
 - 1=Minimal Level
 - 2=Basic Information Level
 - 3=Instructional Support Level
 - 4=Research Level
 - 5=Comprehensive Level

Analysis of Subject Fields: Classed/Conspectus

- IFLA Guidelines:

<http://www.ifla.org/publications/guidelines-for-a-collection-development-policy-using-the-conspectus-model>

- SFU

- ✓ Overview

<http://www.lib.sfu.ca/about/overview/collections/policies>

- ✓ Specific Subject Example

<http://www.lib.sfu.ca/about/overview/collections/policies/siat>

Analysis of Subject Fields: Narrative

- ✓ North Vancouver District Public Library

<http://www.nvdpl.ca/sites/default/files/pages/>

[Library Board Manual 4 Library Collection Whole.pdf](#)

- ✓ Langara College

<http://langara.ca/library/about/collection-management/collection-guidelines.html>

Reminder from previous class

- Process for revisions
- Frequency of policy review
- Current date
- Signature

When Asked to Reconsider Library Weeding

- Purpose: control and focus collection complaints
- Authors: institutional guidance imperative
- Roles: subject librarians, administration
- Issues: clearly defined roles, legal issues
- Forms: institution type, need to coordinate, templates

More on Selection for your Cumulative Portfolio



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Selection Planning

Typical expectations in a typical workplace

- Needs assessment; development policy (basic mission, goals)
- Consultations: listen to your users (direct, mediated), supervisor, colleagues (selectors in related portfolios)
- Get out of the office: browse the stacks, watch how the collection is being used
- Focus on locations: reference, stacks, reserves, busy subfields
- Library reports: ILL, LibQual, circulation (by subfields), user statistics
- Comparisons: with other libraries (libguides), other parts within the library (seek equivalencies)

Remember Selection Theory?

Triangulate

1. Patron focused selection criteria
2. Collection focused selection criteria
3. Budgetary focused selection criteria

Patron Focused Selection Criteria:

- Knowledge of patron base
 - community/individual
 - Personal use vs. professional use
 - Technological issues (e vs. print preferred)
 - Cultural standards
 - TRL institutions: course material
- Institutional/business tools
 - Recommendations
 - DDA, PDA
 - Predictability = approval plans, best seller lists
 - TRL institutions: Curriculum Development Forms (reading lists)

Collection Focused Selection Criteria:

- Knowledge of collection
 - Fit with collections' policy
 - Filling gaps (forwards/backwards/refresh)
- Short vs. long term
- Size/storage
- Instinct/Experience

Budgetary & Legal Focused Selection Criteria:

- Own: purchase, exchanged, obtained for free (print books)
- Lease: temporary control, issue of contracts (popular books, McNaughton Plan)
- Access issues: purchase right to view, download, community use, ILL, print (scholarly journals)
- Fear drivers: accountability
 - Taxpayers, utility, cultural standards, cultural mission
 - Professional, what's been left behind

Other Considerations

- Suitability/relevance
- Unbiased (multiple viewpoints)
- Subjects covered appropriately to needs
- No exclusion: race, religion, gender, national origin, sexual preference, political view of the author, material or user
- Public attention
- Price
- Format
- Availability
- Recent
- Grammatical correctness, well-presented, accurately annotated, logically organized

Other Selection Factors

- Content/subject
- Language
- Currency
- Credibility
- Writing style
- Scope of work
- Author/editor/publisher credentials
- Geographic coverage
- Quality of scholarship
- Frequently cited
- Access points
- Reader level/style
- Ease of use
- Physical quality
- Uniqueness (content, features, etc.)
- Cost vs. quality of item
- Availability of equipment (if required) to access

Where to Keep Looking

- **Publishing industry:** professional library reviewers (Choice), **publisher's marketing materials**
- **Library industry:** library organizations of all kinds, library catalogues and research guides, events, workshops, committees, contacts, conferences, etc.
- **Subject area industry:** organizations and their databases, talking to people who actually do the job
- **Personal knowledge pathways:** requires discretion and a significant level of understanding to determine value...online bookstores, bloggers with opinions

Are you seeing everything published?

- Titles falling off approval plans
- Prize-winner lists (e.g., Amazon, GBIP, local awards, year's best list on professional blogs, etc.)
- ILL reports (across formats)
- ALA/ACRL websites
- Guide to Reference Books (ALA)
- **Get on mailing lists: library & subject organizations, small publishers**
- Watching competitive collections
 - ✓ Comparison to other libraries
 - ✓ Comparison to local libraries
- Walking the streets (physical, conceptual)



Authoritativeness of Reviewers

- Who: degrees, publications, affiliations
- Organization: inside and outside of profession/industry
- Forms of recognition
 - ✓ Awards
 - ✓ Reviews
 - ✓ Popularity
 - ✓ Reputation

More Professional Review Tools

American Book Publishing Record (ABPR) (Bowker)	Kirkus Reviews (current only)
American Reference Books Annual (ARBA) (Libraries Unlimited)	Library Journal (LJ) Reed Business Information
Book Review Digest (Wilson)	Magazines for Libraries Bowker
Book Review Index (BRI) (Gale)	Mystery Ink
Booklist (ALA)	Publishers Weekly (Reed Business Info)
Books in Print (Bowker)	Reader's Advisor (Greenwood Publishing)
Choice (ALA)	SF Site (www.sfsite.com)
Criticas Spanish Language Authors & Book Reviews	School Library Journal (SLJ) Reed Business
Guide to Reference (ALA)	Serials Review (Elsevier)
Horn Book Guide (Children's)	Ulrich's International Periodicals Directory
Historical Fiction Review (Historical Novel Society)	Voice of Youth Advocates (VOYA) (Scarecrow Press) (Teenagers)



Analyses & Accountability



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Contesting Professional Visions Regarding Library Collections

Humanism

- Individual
- Freedom
- Citizenship/
Responsibilities
- Library collections
- Democracy and the
unstable life

Tribalism

- Group Identity
- Ideology/Power
- Membership
- Library collections
- Populism, totalitarianism,
authoritarianism

Accountability



In ethics and governance,
accountability is answerability,
blameworthiness, liability, and
the expectation of account-
giving.

As an aspect of governance, it has been central to discussions related to problems in the public sector, nonprofit and private and individual contexts.

8 Types of Accountability

1. moral
2. administrative
3. political
4. managerial
5. market
6. legal / judicial
7. constituency relation
8. professional.

Leadership accountability cross cuts many of these distinctions.



Library and Archival professional associations set accountability standards, and individuals and organizations can voluntarily commit to them.

**To achieve Accountability, a
certain amount of
organizational analysis then
needs to happen.**

Analysis is the process of breaking a complex topic or substance into smaller parts in order to gain a better understanding of it.

It has been ascribed to Isaac
Newton, in the form of a
practical method of physical
discovery.

**Various strategies of analysis
are invaluable for collections
management!**



Solutions often include a software-systems development component, but may also consist of process improvement, organizational change or strategic planning and policy development.

We use business analysis strategies to ensure that the potential future collection is suitable for current and future needs.

But, we do not rely solely on business analysis strategies, nor do we rely solely on anecdotal data. Instead, we are constantly working towards an amalgamation.

Business analysis as a discipline includes strategy analysis, requirements analysis, and future state description.

Future state description includes
how we see the collection
operating in the future as well as
other details such as
organizational capabilities and
organizational structure.

Using analysis for accountability focuses on ensuring the changes made to a collection are aligned with its strategic goals.

There are over 100 business techniques that a professional librarian or archivist can select when facilitating analysis and communicating accountability of collections management work.

6 Categories of Analysis Techniques

1. strategic
2. investigative
3. analytical
4. project management
5. documentation
6. modeling

The role of librarians using business analysis techniques is to support collections work within the entire organizational framework, never as a separate operation.

The process of analyzing for accountability provides guidelines and deliverables. It also provides a process to focus on continuous improvement for the information organization.

In an ideal situation, using strategies to analyze collection management is to assess the return on investment for this work and to communicate it to the community.

For librarians looking to specialize in this area, further study into Business Analytics, Change Management, Process Management, and Business Transformation would be highly helpful.

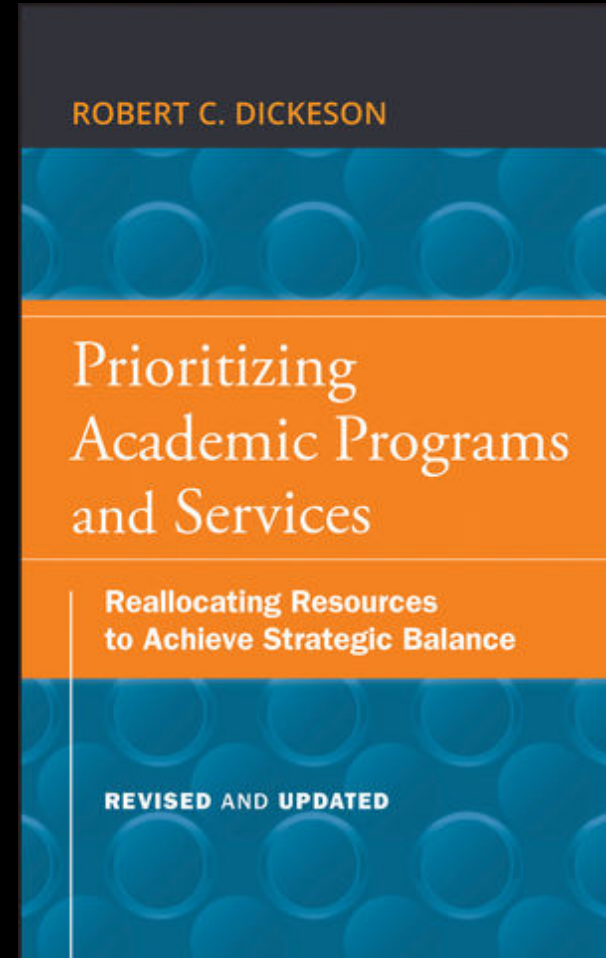
Final note...



Example of Organizational-level Analysis and Accountability

Very popular approach

Dickeson, R.C. (2009).
Prioritizing Academic Programs and Services: Reallocating Resources to Achieve Strategic Balance, Revised and Updated. San Francisco, CA: Jossey-Bass.



Mancuso, M. (March 12, 2014).

Explaining the program
prioritization process:

It's one way for institutions to
become sustainable.

University Affairs.

<https://www.universityaffairs.ca/opinion/from-the-admin-chair/explaining-the-program-prioritization-process/>



Learning Consolidation

Activity = Snowstorm

Activity = Snowstorm

- Each student writes on a piece of paper what they learned today and wads it up into a snowball.
- We move together into one group circle
- With a signal, we throw our paper snowballs into the air and keep doing so until it seems appropriately mixed up.
- Then, each student picks up a nearby response and we each take turns reading the snowball aloud

From this, we will know how learning went today and what students need to finish their final assignment for August 9th

Next Steps



Next Steps

- Any outstanding assignments, please!
- Keep working on...
 - DRAFT Budget
 - DRAFT Outline
 - And other parts of Cumulative report
 - Your 3-sided Poster Board (or flat, printed conference-style one) for August 9th
 - <http://electrified.ca/83267.html>

Thank you!

See you Tuesday in the classroom!

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Until UBC email works,

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