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Colleen Hoelscher

University of Dayton, choelsch@trinity.edu

Jillian M. Ewalt

University of Dayton, jewalt1@udayton.edu

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Separating the wheat from the chaff: Intensive deselection to enable preservation and access

Colleen Hoelscher

Marian Library, University of Dayton, Dayton, Ohio, USA.
choelscher1@udayton.edu

Jillian Ewalt

Marian Library, University of Dayton, Dayton, Ohio, USA.



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Abstract:

In 2014, the Marian Library at the University of Dayton completed a long overdue revision of its collection development policy. The new document more clearly defined the scope of the library's collections, and was intended to guide new acquisition decisions. However, this new document had the unexpected benefit of providing a framework for deselection projects that enabled preservation and improved access to the collections.

This paper will discuss and analyze two of these projects, and demonstrate how the revised collection development policy laid the foundation for successful deselection outcomes. In the first case study, legacy collections of genre-based ephemera were heavily weeded to remove photocopies, internet printouts, duplicates, and other out-of-scope materials. Both the challenges and benefits of weeding legacy reference files will be discussed. The second case study will examine a comprehensive review of the library's inactive periodical holdings, consisting of over five hundred titles that were largely uncatalogued. Removing titles outside of the library's collection scope transformed the collection into a manageable project for the cataloging staff to tackle. This formerly hidden collection, including rare periodicals not found elsewhere in the United States, is now in the process of being cataloged.

Both projects transformed local practices and improved utilization of the library's limited resources in staffing, time, space, and funding. Faced with legacy practices that compromised physical and intellectual control of materials, librarians leveraged a well-defined collection development policy to undertake two successful deselection projects. The policy was used to justify and guide deselection, ultimately improving both preservation and access.

Keywords: collection development policies, special collections, weeding, deaccessioning.

Introduction

In 2014, the Marian Library at the University of Dayton completed a long overdue revision of its collection development policy. The new document more clearly defined the scope of the library's collections, and was intended to guide new acquisition decisions. However, this new document had the unexpected benefit of providing a framework for deselection projects that enabled preservation and improved access to the collections. Today I will be discussing two of these projects, and demonstrating how the revised collection development policy laid the foundation for successful deselection outcomes that improved both preservation of and access to library collections.

The Marian Library is the world's largest collection of books, manuscripts, and artifacts about Mary, the mother of Jesus. It was founded by the Society of Mary at the University of Dayton in 1943 to make the Blessed Virgin Mary better known, loved, and served. Working with a non-existent budget and expansive collection goals, library staff rarely turned down a donation, regardless of how tenuous the material's connection was to Marian topics. The result was a bloated collection that soon outpaced the library's storage space and preservation resources. Without the staffing or time to properly catalog materials, there was a large backlog of unprocessed acquisitions. As new staff came into the library, some efforts were made to change legacy collecting practices, but the lack of any documentation dealing with collection development made it extremely difficult to decline potential donations, and to justify changing practices to longtime staff members.

Over time, it became increasingly apparent that the library needed a clearly defined collection development policy that was narrow in scope. The librarians and archivists on the library's staff, together with the Marian Library director and the dean of the university library system, spent over a year between 2013 and 2014 crafting this new document. A general collection assessment was conducted, with particular focus on areas of the library containing unique formats and materials. The committee looked at collection development policies at other libraries, with a particular focus on other small, theological libraries with similar collections. The final document provides specific guidelines regarding collection development and management for the library, particularly addressing collecting scope with regards to subject matter and material types.

Much has been written in the literature about the importance of collection development policies for acquisition decisions and general library activities. Peggy Johnson (2009) argued that library operations "occur in isolation and without coordination if the library has no recorded rationale for decisions" in the form of a written collection development plan that is "consulted, reviewed, revised, and updated regularly" (p. 72-73). Carmelita Pickett et al. (2011) found that implementing a robust collection development policy improved acquisitions accountability and allowed librarians to emphasize collection priorities. It is also essential that the collection development policy for a religious library--such as this one--works in support of the library's spiritual mission (Keck, 2015). Some librarians have argued that written collection development policies are no longer necessary, but this has not proven to be true in our experience (Snow, 1996).

In addition, both national and international groups have established guidelines for collection development policies and acquisitions. The IFLA Acquisition and Collection Development Section drafted a set of guidelines for collection development policies in 2001; this document

defines a collection development policy as “a kind of framework and set of parameters within which staff and users work.” This framework applies to all areas of librarianship, including acquisitions. In the United States, the Association for Library Collections and Technical Services (ALCTS), a division of the American Library Association, has a “Statement on Principles and Standards of Acquisitions Practice” (1994). This document suggests best practices for fair and ethical acquisition practices for librarians, and states that “In all acquisitions transactions, a librarian...gives first consideration to the objectives and policies of his or her institution,” such as those laid out in a collection development policy.

When we were crafting our new collection development policy, the goal was to have a document that could be used to guide acquisition decisions. We were surprised to find that the broad statement from the IFLA guidelines mentioned earlier was much more accurate: the collection development policy informed decisions made in all areas of our work, not just purchasing new materials and evaluating donations. In particular, weeding projects were undertaken in two library collections--the ephemera collection and the periodicals collection--where the collection development policy was applied to make de-accessioning decisions. In turn, these projects allowed for a better use of the library’s limited resources by reducing the materials that needed to be processed, preserved, and housed.

Case Study 1: Ephemera Collection

The Marian Library’s archival holdings include extensive genre-based ephemera collections. These collections include postcards, holy cards, stamps, brochures, prints, clippings and more. The current Marian holy card collection includes over 10,000 Catholic holy cards dating from the 17th century to present day. Materials in the present collection deal with Marian topics; for example, events in the life of Jesus and Mary, Marian titles, and Marian shrines. In addition to recent and popular prints, holy cards in the collection include rare works dating to circa 1675. More unique items in the collection include prints on vellum, silk, and three dimensional cards with moveable parts.

Prior to processing, the collection also contained photocopies, internet printouts, exhaustive duplication, and other out-of-scope materials. Non-archival items included, for example, photocopies of holy cards and often additional photocopies of items already in the collection, leading to an overwhelming number of duplicative reproductions. These tenuously relevant items and ubiquitous inclusion of non-archival formats led to a collection that was distended and difficult--if not nearly impossible--to use. Additionally, archival card boxes, acid free dividers, and box spacers needed to be purchased for preservation and rehousing. The size of the collection due to inclusion of non-archival formats meant that preservation and rehousing costs were astronomical.

Additionally, the holy card collection reflected a legacy library practice. Twenty to thirty years ago, it most likely served as a pre-internet reference file, hence the inclusion of photocopies and then later, printouts of early websites depicting holy cards. Before the existence of resources like ArtStor and Google Image, the collection may have served as a helpful research supplement, but today it had little use for current scholars who could easily locate many of the items online. Furthermore, over 50 percent of items in the collection were reproductions. These were so extensive that the rare and unique items became a quite literal “hidden collection.”

With all of these challenges faced prior to processing, the Marian Library's collection development and management policy laid a solid foundation for the next steps. Using guidelines from the policy, archivists were able to undertake both processing and deselection simultaneously. Student library employees assisted with the first phase of deselection. They were provided guidelines and training on what to remove from the collection including photocopies and internet printouts. Once the photocopies and internet printouts were removed, the archivist was able to review the collection and remove additional "gray area" materials that were also out-of-scope, like non-Marian items and other formats, such as clippings.

There are several challenges in undertaking deselection of legacy reference files. These include gaining staff buy-in, creating clear guidelines for processing assistants, as well as establishing new practices moving forward. Staff buy-in for this project was difficult because senior staff members in the Marian Library lacked an understanding of the purpose of deselection in archival practice. Ongoing advocacy was necessary to help staff understand both the purpose and process, and to ensure that these materials were not added back to the collection after deselection. Archivists needed to develop clear guidelines for student processing assistants. Initially students were trained on deselection criteria, but it was confusing due to the large amount of "gray area" materials. The archivists decided to implement a second phase of deselection to ensure that items other than photocopies and internet printouts could be evaluated further. For example, clippings were mostly discarded but some were retained for their research value. Many that were retained served as a unique document of Catholic social and cultural trends, often via an advertisement on the verso. This added to processing time but was necessary in order to ensure accurate deselection.

For this project, the benefits of deselection outweigh the challenges. The benefits included reducing supply, preservation, and storage costs, culling the collection to meet current scholar expectations, and providing space for the limited staff to focus time on providing description, preservation, and access to prioritized archival material--without having to get lost in a sea of internet printouts and duplicate copies. The collection development and management policy provided a foundation from which to advocate for and complete this important project. It also documents guidelines for continuing to develop the collection.

Case Study 2: Periodical Holdings

A second example where the collection development policy was applied to a legacy practice was the library's inactive periodical holdings. The library had a collection of over five hundred historic periodical titles, all without an active subscription, and most without any catalog records. Over the years, efforts have been made to begin cataloging this collection, but these have always stalled out due to the large scope of the collection. Because of the highly specialized subject matter our library collects, many of these titles are extremely obscure, and will require original cataloging--always a daunting task, especially at this large of a scale.

Librarians began this project by completing a cursory inventory of the entire collection, noting publication title, holdings, and general preservation concerns. Data was then added about duplicative holdings within our university library system, as well as the number of holdings within our statewide consortium, OhioLink, and in Worldcat.

Using the new collection development policy as guidelines, librarians were able to quickly identify 162 titles that could be weeded from the collection. These titles were removed for a

variety of reasons: some represented general theological or art history texts, which fell outside of the subject scope of the library under the revised policy and were widely held at other libraries. The revised policy also made it clear that holdings should not be duplicated within the university library system without great cause; this includes duplicating electronic resources with print versions.

Removing titles that did not fall in line with the collection development policy reduced the total number of titles by thirty percent. Forty-three of these titles duplicated materials held elsewhere in the library system, or for which the library had online access to the electronic copy. The remainder were deemed out of scope, after a review process which involved librarians and faculty members in our discipline, who worked together and in consultation with the collection development policy.

Undertaking this deselection project had instantaneous benefits for the library. At a time when we are extremely pressed for shelf space, we were able to discard hundreds of linear feet of material that were out of scope or duplicative. The inventory that was created as an early step of the weeding process, though not a long term solution, does allow minimal intellectual control over the collection, and has been made available to our patrons in our reading room and on our website. Finally, reducing the size of the collection has made the cataloging needs more manageable, creating momentum that has encouraged our cataloging staff to move forward with this project. What was formerly a “hidden collection” is now in the process of being fully cataloged.

Conclusions

In both of these projects, the newly created collection development policy was crucial to guiding the decision-making process. Having this policy in place allowed for swifter and more consistent decision making through both projects; the clearly defined collecting policies reduced the need for deliberation over individual items, and enabled students to assist with routine discarding tasks. There was also significant staff resistance to de-accessioning materials in both collections that this document was crucial in addressing.

Frequently we think of a collection development policy as being used to guide acquisitions management, but our experience showed us that it serves an equally vital role in the opposite process--de-accessioning materials. We would encourage any library undertaking a weeding project to consult their collection development policy--and if necessary, create or revise this document according to their current scope and needs--as a part of the planning process for any deselection project.

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