IDS Project Conference
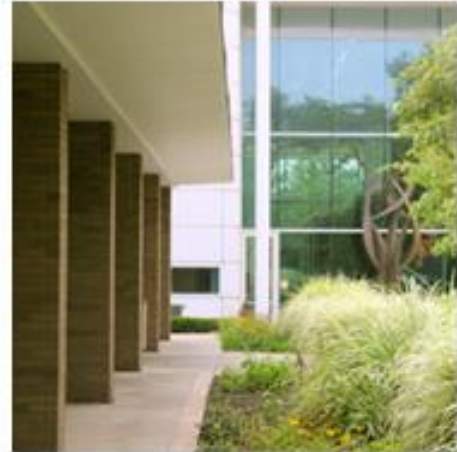
Wayne State University Libraries

Going For Broke:

Combining Three Deselection Projects Into One

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W/contributions by Diane Paldan

Librarian III

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Historical Collection Development Practice ("Juicing the Numbers")

- Like many ARL Libraries ranking was, in part, based on the number of volumes on the shelves

- Collected material outside of library systems area of specialties

- Acquired a great MANY copies of a great MANY titles

Projects to be covered

MI-SPI (Michigan-Shared Print Initiative)

Dedupe

Classed Serials-Deselection/Retention

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Why these projects now?

- MI-SPI project served as catalyst for the two adjoining deselection projects. In the interest of time and minimizing cost we choose to focus on two critical areas that housed print materials
  - ❖ Materials Storage: Increased print holding capacity for materials coming from entire system
  - ❖ Open Stacks: 3rd floor of Graduate library
    - o Floor unusable for space

- Closure of Science & Engineering Library end of 2013
  - ❖ Need to increase study space in Graduate library

- Financial:
  - ❖ Opportunity costs
  - ❖ Economies of scale

Dollars & No Sense

Council on Library and Information Resources (CLIR)

"*The Idea Of Order: Transforming Research Collections for 21st Century Scholarship*". CLIR report concluded on average a library bears an annual indirect cost of:

❖ $4.26 for each volume held in open stacks
❖ $0.86 for each volume held in high-density storage

Council on Library and Information Resources (CLIR), June 2010.
http://www.clir.org/pubs/reports/pub147/pub147.pdf

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Inventory – An unintended first step

- Inventoried significant portion of library collection 2006-2010
  - ❖Purdy/Kresge Graduate Library
  - ❖Science & Engineering Library
  - ❖Undergraduate Library
  - ❖Materials Storage

- Deduping late addition to process

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Major problems in ILS data: Bad Data In, Bad Data Out

- All copies not recorded in building database
- Significant portion of circulating/ open stack monograph and serial collections not barcoded
- While targeted inventory has occurred in the last decade -- most of the collection not inventoried since before our first ILS
- Two ILS migrations – In 1999 and 2004 have caused additional errors to creep into the system

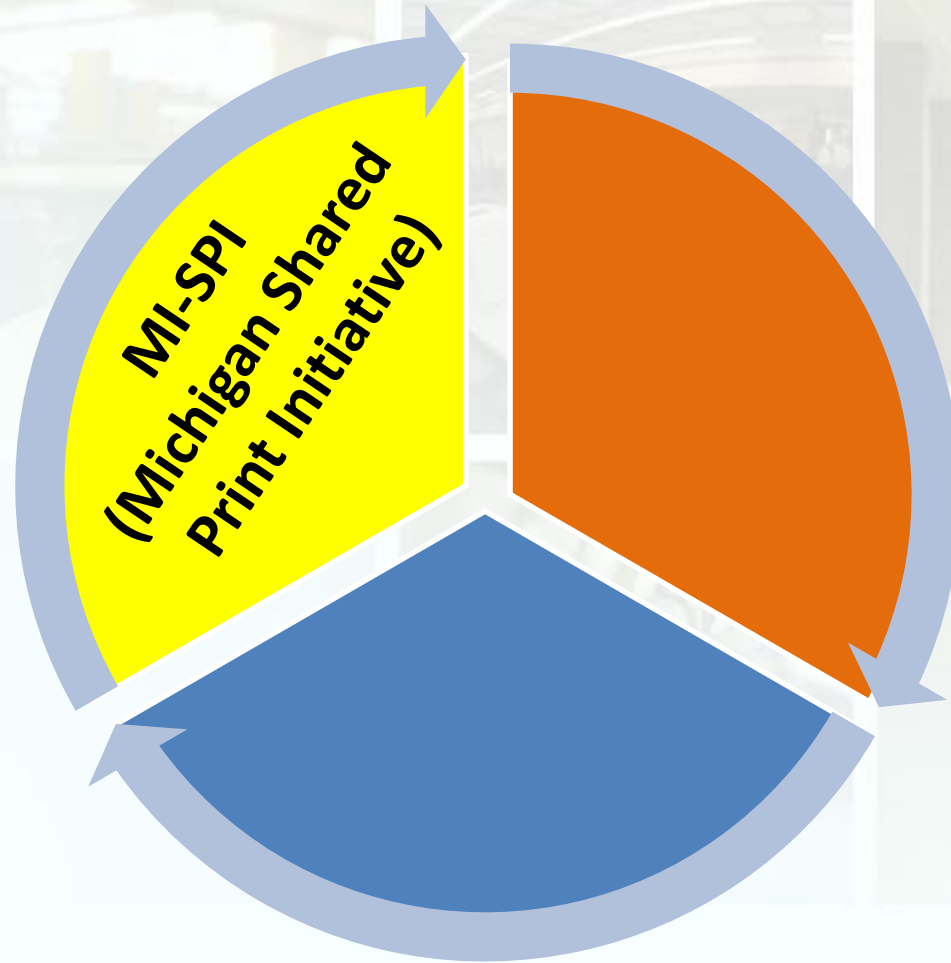WAYNE STATE UNIVERSITY
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Results -

- Books on shelf without records
- Records for books not on shelf
- Item records linked to the wrong bib record (Bib Utility # Mismatch)

All projects planned remembering the shortcomings in our ILS data

Functions used to manage projects inside and outside of Millennium

- In Millennium
  - ❖ Create lists
  - ❖ Internal Notes to flag records
  - ❖ Global and Rapid Update
- MS Excel
  - ❖ Vertical Look up
  - ❖ Filtering
  - ❖ Pivot tables

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Phase 1

MI-SPI
(Michigan Shared
Print Initiative)

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MI-SPI/MOU
"One Collection, One Community"

In 2011 Dean Sandra Yee signed an MOU, along with six other academic libraries in Michigan, agreeing to participate in a *pilot* Resource Sharing project sponsored by Michigan Collaborative for Library Services (MCLS) and project manager Sustainable Collections Services

MI-SPI First step

- WSUL Systems staff exported 1.5 million records of circulating material *only*

- Sustainable Collection Services (SCS) analyzed data from all participating libraries including
    - ❖ Published <2004
    - ❖ Circulation </=3

- SCS delivered lists to each library
    - ❖ Items to keep – "Allocated Retention"
    - ❖ Items to "Allocated Withdraws" (other "Pilot" libraries would keep at least two copies)

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MI-SPI Criteria added once project began

- In preparation for creating Detroit Poetry Collection, removed
  - ❖List of Detroit poets
  - ❖List of small publishers
- Special request to preserve classics in the collection
  - ❖Specific series selected by literature liaison

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MI-SPI list from SCS

- Over 368,000 item records

Location Name	Location Code	Call Number	Title	Author	Publisher	Series	Publication Year
Purdy-Kresge Library	pbstk	PN 1997 .C295	David Holzma	Carson, L.	New York : Farrar, Strau	[A Noonday	1970

Last Item Date Added	Catalog Record	WorldCat Record	Total Charges	US Holdings - WorldCat	State Holdings - WorldCat	Hathi Trust In Copyright	Hathi Trust Public Domain
6/18/2004 0:00	Catalog Record	Worldcat Record	1	200	10	F	F

Reviewed in CHOICE	Allocated for Withdrawal	WorldCat OCLC Number	Bib Control Number	Item Control Number	Barcode		
F	1	100711	ocm00100711	.i13042038	39343003284170		

Script used to create review file

List of Item Record numbers for books to be pulled sent to Systems Librarian --who then created new review file

"TCL/Expect"

It was not possible for us to create review file from list of barcodes through the Millennium inventory system -- since many item records did not have a "real" barcode e.g. mq12345.

Over 25 columns of data

- Location Name
- Location Code
- Call Number
- Call Number Normalized
- Title
- Author
- Enumeration
- Publisher
- Series
- Publication Year
- Last Item Date Added
- Catalog Record
- WorldCat Record
- Total Charges
- US Holdings - WorldCat
- State Holdings - WorldCat
- Hathi Trust In Copyright
- Hathi Trust Public Domain
- Reviewed in CHOICE
- Allocated for Withdrawal
- WorldCat OCLC Number
- Bib Control Number
- Item Control Number
- Barcode

Filter MI-SPI list

- Added this data to MI-SPI withdrawal list
  - ❖ MS Excel Vertical lookup
  - ❖ Use Item Record number as match point
- Filtered to apply WSUL criteria for "saves"

Reduced master withdrawal list from
over to 368,000 to 306,000

Creating "Pull Lists" for targeted collection

- Create review file for all circulating items in call number range for targeted location -- Export

 In MS Excel

- Compare MI-SPI list to MIL export
  ❖ Remove titles not on MI-SPI list
- Filter spreadsheet to remove
  ❖ Saves based on WSUL criteria – double check
  ❖ Saves base on recent circulation history

Exported data from new review file

- Call number sort before export -- More accurate order than on MI-SPI list since we are actually using Millennium indexing

- Double check to determine anything missed in criteria review that would remove title from list (e.g. current/recent circulation)

- Update item records to withdrawn with

  Internal Note (x) = SCS withdrawal "date"

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Final pull list includes

- Data from recent MIL export
  - ❖ Call number
  - ❖ Barcode
  - ❖ Physical description
- *Title* from SCS list
  - ❖ To catch mismatch of our records to OCLC -- Since SCS analysis based on bibliographic utility number
- Suppressed & Withdrew all items prior to pulling from shelves

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"Pull List"

F	H	I	J
CALL #	BARCODE	SCS title	DESCRIPT
AC 8 .G335 1996	39343015366320	Weird water & fuzzy logic : mor	260 p. : ill. ; 24 cm
AG 5 .C7234 2000	39343019444560	The Facts on File dictionary of c	ix, 470 p. ; 24 cm.
AS 911 .N9 N586 2001	39343020867858	The Nobel Prize : the first 100 y	viii, 235 p. : ill.; 25
B 72 .S655 1997	39343015362246	A passion for wisdom : a very b	xviii, 137 p. ; 22 cr
B 73 .F76 2003	39343021189682	From Africa to Zen : an invitatic	xvi, 296 p. ; 24 cm
B 73 .F76 2003	39343021205595	From Africa to Zen : an invitatic	xvi, 296 p. ; 24 cm
B 74 .G59 1992	39343016020470	Thinking things through : an int	xi, 382 p. : ill. ; 23
B 105 .C477 D455 1996	39343015575979	Kinds of minds : toward an und	viii, 184 p. : ill. ; 24
B 105 .F66 K67 1999	39343019261238	Making sense of taste : food &	xii, 232 p. : ill. ; 25
B 105 .T54 M54 1985	39343019427243	Thinking tools : academic, perst	viii, 358 p. : ill. ; 24
B 105 .T7 Q47 2004	39343021546519	Questions of tradition / edited	xv, 325 p. : ill. ; 24
B 121 .K86 1999	39343019274538	Learning from Asian philosophy	viii, 208 p. ; 24 cm
B 125 .F45 1966	39343017778563	A short history of Chinese philc	xx, 368 p. ; 21 cm.

Item Record

| Summary | Record i33793153 | 0 Item-Level Holds | 0 Bib-Level Holds |

i33793153   Last Updated: 07-24-2013   Created: 06-26-2004   Revisions: 8

Copy No.	1	Last Checkin	- -	Last Checkout Date	- - :
Item Code 1	0	Inventory Date	02-23-2010	Location	sbstk Sci and Eng
Item Code 2	n SUPPRESS	Checkin Location	0	Loanrule	0
Item Type	18 BOOK	No. of Renewals	0	Status	w WITHDRAWN
Price	$60.00	No. of Overdues	0	Internal Use	0
Checkout Date	- - :	Overdue Date	- -	Copy Use	0
Checkout Location	0	Item Use 3	0	Item Message	- NO MESSAGE
Due Date	- -	Recall Date	- -	OPAC Message	- ---
Patron No.	0	Total Checkouts	1	Year-to-Date Circ	0
Last Patron	0	Total Renewals	0	Last Year Circ	0

Call No. 050   QH 401 .A395 2000
Barcode   39343019198406
Internal Note   SCS withdrawal 7/23/13 dp

Instructions to staff

- Staff pulled all copies with exact call number
  - ❖ This includes copies not barcoded or without items in database -- therefore not on list
- Updated Internal Note to
  - ❖ "SCS save" if
    - o Book found to be Library Use Only
    - o Bookplate indicating gifts books to be kept
  - ❖ "SCS mismatch" = SCS title did not match book pulled by call number – Sent to cataloging

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Final record clean up

- Create list of any records with "SCS save" and correct codes as needed
- Run create list to see if any MI-SPI withdrawals in circulation – update to "SCS save circ"

  Title level withdrawals

- Determine records where all copies have been withdrawn and update BibCode 3 to withdrawn
- Remove Wayne holding symbol from OCLC records

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Phase 2

Dedupe

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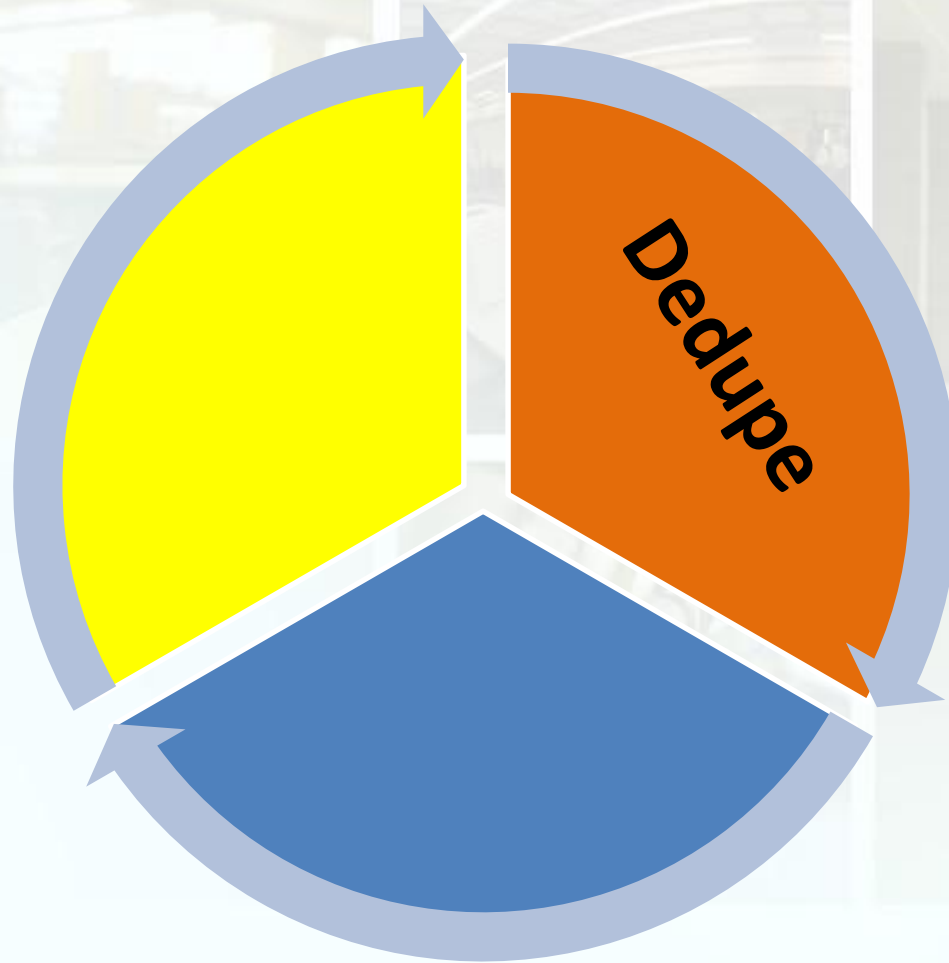
Dedupe - Reasons

- Address historical practice of collecting multiples copies

- Offset number of "Allocated Retention" from MI-SPI project

- Align collection footprint with overall level of use and most reflective library's primary subject areas; *e.g. K-12 Education, Automotive Engineering, etc…*

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Dedupe principles

- Only dedupe *against* inventoried collections

- Retain duplicate copies if…
  - ❖ Circulating statistics indicate high use
  - ❖ Local history titles (Detroit, Wayne County, etc…)
  - ❖ Title has copies on reserve
  - ❖ Special subject focused gifts in collection
  - ❖ "Bound with" titles
    - o Two distinct items bound together

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Constructing dedupe list

Three steps in Create Lists

- Create review file for location and call number range – item records – *from that*
- Create bibliographic file – *from that*
- Create review file for <u>all</u> circulating items attached to bibliographic record
- Export into MS Excel –
  - ❖ Use Saved Export created for project

Getting to duplicate copy titles

In MS Excel –

- Filter at title level to remove
  - ❖ Monographic sets
  - ❖ Titles that might have copies on Reserve
  - ❖ Local History titles
  - ❖ Damaged or missing copies
- Pivot table and Vertical Lookup to remove
  - ❖ Single copy at WSUL from review

Two lists needed

- Dedupe between and within collections

- If all copies in a specific collection could be withdrawn, process same as SCS withdrawal
  - ❖ Records can be updated to withdrawn prior to pull
  - ❖ List for pulling created

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If some copies in the collection being reviewed need to be retained

- List created indicates number of copies to keep
- "Pull List" marked by student to indicate copy kept

| I	J	K	L	M	N	O
pbstk decision	# copies on list	NOTE	CALL #	TITLE	BARCODE	DESCRIPT
keep 1	2		LB518 .S33	Rousseau as educator [by]	39343010678364	152 p. port. 21 cm.
keep 1	2		LB 628 .G77	Pestalozzi & education.	39343003565552	178 p. 19 cm.
keep 1	2	K	LB 628 .G77	Pestalozzi & education.	39343015056608	178 p. 19 cm.
keep 1	2	K	LB 775 .M34139713 1989	Sōka kyōikugaku taikei. Eng	39343007588584	xvii, 226 p. : ill. ; 24 c
keep 1	2		LB 775 .M34139713 1989	Sōka kyōikugaku taikei. Eng	39343008773250	xvii, 226 p. : ill. ; 24 c
keep 2	5	K	LB775 .M727 1966	Dr. Montessori's own hand	39343003429973	192 p. illus. 21 cm.
keep 2	5	K	LB775 .M727 1966	Dr. Montessori's own hand	39343004352570	192 p. illus. 21 cm.
keep 2	5		LB775 .M727 1966	Dr. Montessori's own hand	39343004764295	192 p. illus. 21 cm.
keep 2	5		LB775 .M727 1966	Dr. Montessori's own hand	39343005329338	192 p. illus. 21 cm.
keep 2	5		LB775 .M727 1966	Dr. Montessori's own hand	39343011950341	192 p. illus. 21 cm.

Final Processing of Completed List

- Supervisor updates spreadsheet in Excel to indicate copy kept - adding barcode in ILS if necessary

- Spreadsheet reviewed and list of item records for copies withdrawn sent to Systems Librarian to create review file.

- Item records updated to withdrawn with

  Internal Note (x)

  Duplicate copy withdrawal "date"

Phase 3

Classed Serials-Deselection/Retention
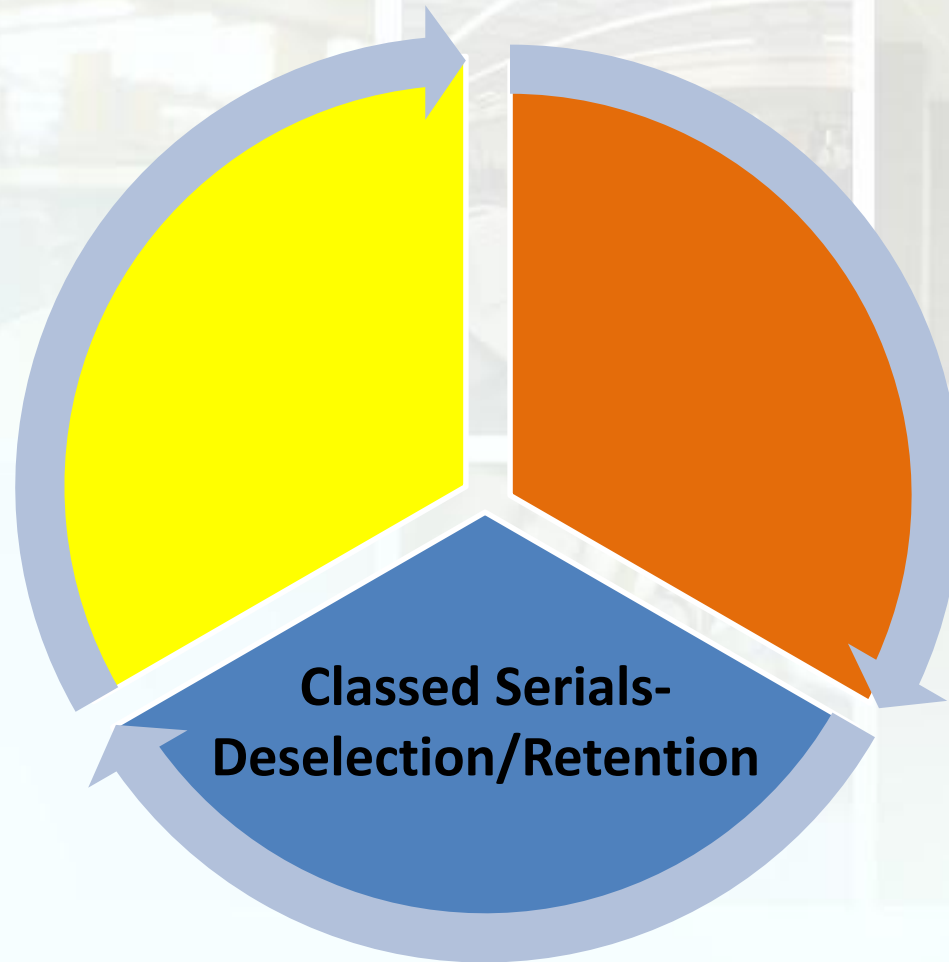
Final step in downsizing collection

- Undoing collection practices of the past that encouraged an "add it all" mind set in processing gift serials -- In move to increase volumes counts
  - ❖ Many duplicate volumes added
  - ❖ Scattered and incomplete serial holdings added
- Moving low use research material to Storage collection

More than just a Deselection process

Manual process to review serials runs in Purdy Library circulating books collections to …

- Withdraw incomplete holdings and material no longer needed in WSUL collections
- Transfer low use runs needed to Storage collection
- Retain in primary space only select serial titles

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Workflow

- List showing holdings for title in all locations created
- Reviewed by senior librarian who made all retention/location decisions and recorded decisions on print out
- Student pulled material from shelf
- Staff trained for serials work
  - ❖ Withdrew material
  - ❖ Transferred Serial runs to Storage collection

Review list for Serials

A	TITLE	M	Q	V
RECORD #(B	**TITLE**	**LOCATI**	**852**	**866|a**
b28475082	The health funds grants resource yearbook.	pbstk	RA 410.53 .H44	(2001)
b14809862	National guide to funding in health.	pbstk	RA 410.53 .N37 Latest edition in FOUNDATION COLLECTION/REFERENCE.	5-9 (1990,1995,1997-2005)
b14809862	National guide to funding in health.	mdref	RA 410.53 N37	[1990]
b23914397	Advances in medical sociology.	pbstk	RA 418 .A385	1 [1990]
b23914397	Advances in medical sociology.	ubstk	RA 418 .A385	v.8 (2002)
b22069872	Advances in health education.	pbstk	RA 440 .A1 A28	1-4 (1988-1996)
b25777178	Health services administration education.	pbstk	RA 440.6 .H44	
b2374456x	Annual report / Michigan Risk Reduction and A	pbstk	RA 644 .A25 M5	(1989-1990,1992)
b21759728	AIDS related services for Michigan : resource di	pbstk	RA 644 .A25 R4	5 (1990)
b21759728	AIDS related services for Michigan : resource di	pbstk	RA 644 .A25 R4	5 (1990)
b21759728	AIDS related services for Michigan : resource di	mdref	RA 644 .A25 R4	5 [1990]~"In Reference."

Formula Bar

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Bonus from this process

- Serial runs were inventoried and holdings statements corrected or confirmed

- Item records created for transferred material --improving retrieval process

- Withdrawal of incomplete holdings will reduce ILL requests for volumes never held

All projects contributed to database clean up

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Deselection in Action

Dollars & Sense - by the Numbers

Library	Items Withdrawn		Total Items Withdrawn	Rentention Cost
	MI-SPI	**Dedupe**		
David Adamany	5,830	**Few Added to**	5,830	$24,838.80
Materials Storage	93,600	7,490	101,090	$86,937.40
Neef Law	81	**NA**	81	$345.06
Purdy/Kresge Graduate	68,755	33,005	101,760	$433,497.60
Science & Engineering	21,268	**Previously deduped**	21,268	$90,601.68
Shiffman Medical	845	773	1,618	$6,892.68
Totals	190,379	41,268	231,647	$643,113.22

THANK YOU!

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