

Weed, Shelve or Store? Making the Hard Decisions

Some Practical Tips and Thoughts about Best Practices

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Statistics about HLSL collection

- Approx. 1.8 mil. vols
- 2,492 vols withdrawn (2008)
- *15,474 active “serial” subs (2008)
- Approx. 50% of collection offsite

Weeding projects involving periodicals in the last 7 yrs

- 2003: quick date split in Reading Room for KF subject periodicals (1980+)(regardless if online)-moved all to remote storage – head of CD identified, ran by selection committee and was processed quickly by circ and tech services

2003/2004: thorough weeding of entire Reading Room, including periodicals

- Group effort – all reference librarians
- Physically looked at entire RR collection (split up call numbers)
- Could not overload tech services staff, so created slips and used printouts for periodicals
- Created guidelines
- Needed a lot of management and oversight; administration

Selected guidelines for 2003/04 project

- Subject periodicals: keep 1980-date in Reading Room; send earlier volumes to HD (e.g. *Journal of Legal Medicine*)
- PLI Course Handbook Series titles: current 5 years; earlier to HD
- Other serial handbooks (e.g. *Licensing Law Handbook*): current 5 years; earlier to HD
- Yearbooks, annual reviews and symposia (e.g. *Yearbook of Education Law*): 1980-date; earlier to HD
- Organizational periodicals/newsletters (e.g. *Title News*): current 10 years ; earlier to HD
- Annual reports (e.g. federal agencies, ABA sections, etc.)-current 10 years; previous to HD
- “Dead” periodicals: send to HD

2005/06 State Collection

- Included few periodicals
- In response to space loss; time constraints
- Shared effort with reference librarians; each took certain number of states
- Guidelines, but wide discretion in librarians

2007/2008:

Limited retention for things in HeinOnline or JSTOR

- Limited retention of journals that appear on HeinOnline/JSTOR to 5 years
- EXCEPTIONS:
 - Harvard Law journals
 - Already accepted “library of record” responsibility
 - Peer-reviewed or refereed scholarly journals, as in tradition of other disciplines
 - Published by significant commercial/university press publishers
 - Published by the government
 - Peer-reviewed journals from important orgs
 - Problem with reliability or timeliness in HeinOnline unless available OA in pdf
 - Titles that look like they would be difficult to ILL
 - Titles that seem like important social science journals and we are the only print holding at Harvard

Process for implementing limited retention

- Policy meeting (more than just selection committee)
- Selectors went through HeinOnline to compile list that was reviewed by reference staff
- Set maintenance schedule (once per year) for HeinOnline updates
- Consultation with selectors re: application of guidelines

2008: Weeding non-law periodicals

- Went through A to Z serials (all) physically and with ILS report and set suggestions for retention
- Most non-law titles, limited retention to 5 years and discarded if online (esp. pdf) or if held by another Harvard library
- Distributed spreadsheet with suggestions and info. (online availability) to reference staff with deadline
- Consulted with selected faculty
- Given to technical services (awaiting processing)

Gradual movement from paper to electronic: increasingly “radical”

- Used to have multiple copies of certain periodicals (used various journal ranking systems) and sometimes multiple analog formats (print and micro)
- Cut down on multiple copies
- Increasingly dual format, adding electronic
- Cut microform
- Moved paper to offsite storage, sometimes even if not online
- Limited retention of things in HeinOnline or JSTOR
- For print that is retained, moved more from fixed splits (e.g. 1980+) to rolling, self-weeding policies (e.g. current 5 years)
- Less concerned about gaps and walls in online sources for certain sources (less “just in case”)
- Motivation: Space constraints, cleaning up, cancellations/money, CD policy changes

Evolving periodical policy today

- “Access” to major legal journals depending on jurisdiction
- Preferred format will be digital so long as it exists in a stable, citable format (with pagination) and hosted by established vendor or stable governmental entity; pdf/facsimile preferred, but not always necessary
- Exceptions:Harvard
 - Law School publications (still working on digital/web archiving)
 - Library has accepted Harvard “Library of Record”
 - Requested for faculty routing (then retain 5 years only)
 - For Casual Reading (very limited retention)
- Limited “custody/stewardship”; access usually ok if online source is “stable”
- Focus more on foreign jurisdictions where unstable or unavailable online
- More “just in time” vs. “just in case”
- Have to start thinking about how to implement policy

Project Management: Things to Consider for Weeding Projects

- Alone vs. group with vetting; participation vs. “notice and opportunity to be heard”
- Physical vs. virtual (reporting functions through ILS, working from online sources) for identification and evaluation
- Timing (renewal lists)
- Time constraints
- Opportunities for cancellation
- Opportunities for CD policy
- Deadlines
- Move volumes as you weed, or identify and move later (staffing, processing issues)
- Stakeholder involvement
- What to do with withdrawn volumes?
- Do you want to set “rolling” policies?
- Can you establish policy that can be self-implementing (no need for selection staff or reference to assess each title)?
- Where do you want the burden of work to lie?
- How will you keep stats? Separate from routine ones?

Self-Weeding

- Once in place, develop methods for identifying potential titles for weeding (cancellation)-e.g. HeinOnline updates
- Working with tech services to amend check in records

Potential criteria for retaining print (in stacks or offsite)

- Not available in pdf
- Not online at all, but substantive content
- Difficult to ILL
- Is there content in journal not represented online (e.g. masthead, editorial content)
- Likelihood of citation---John Doyle rankings and ISI Web of Science (likelihood of citation vs. “quality” assessment)
- Indexed?
- Peer-reviewed vs. student-edited
- Faculty routing
- Use vs. significance; access vs. custodial/stewarding responsibility
- Perception of print collection by faculty and other stakeholders

Criteria for retaining print offsite

- Available online
- What is your retrieval system like?
Turnaround time?
- Likelihood of use (citation counts); statistics often difficult with serials
- Costs
- Space constraints

Criteria for retaining print in stacks

- Frequently used
- Limited retention
- Uncertainty (no storage crunch)

Criteria for withdrawal

- “Stable” online source-what is your comfort level?
- pdf? Westlaw/LEXIS ok?
- Permanent access; digital preservation (Portico, etc.) University arrangements for big publishers?
- Lesser cited? Lower ranked? (grain of salt)
- Law school law reviews vs. “big publisher” peer-reviewed titles

What is your responsibility and comfort level?

- To be custodian/steward?
- To provide access?
- Now? For your future patrons?
- What makes you comfortable that you will be able to ensure access to future patrons?

Stability of and problems with reliance online

- Aggregator vs. e-journal or package purchase (not all online sources are created equal)
- Open access-how published? Part of Open Access Law Program? HeinOnline?
- Sometimes “practical delays” in content (e.g. vendor processing); missing content (e.g. editorial info, mastheads, etc..)
- Moving wall in HeinOnline—large for big publisher journals, smaller for law reviews—limited retention? Just in case?

Identifying titles, duplicate access

- JISC Academic DB Assessment Tool
<http://www.jisc-adat.com/adat/home.pl>
- Ulrich's
- Washington and Lee Journal Finder
- Full-Text Sources Online
- HeinOnline updates

Assessing Costs

- Processing in ILS
- Doc del/ILL
- Law reviews generally cheap, but other journals?
- Purchase of e-journal archives
- Fear of vendor takeover or huge increases (where is the tipping point?)
- Costs of storage, binding
- Formulae or calculators for the law library community?

Ensuring Accessibility

- ILS/OpenURL solutions
- Mistakes
- Educating users
- Upkeep
- Volatility of many aggregators; changes in publishers

Ways for libraries to be involved (for discussion)

- Increased involvement in publication of own law journals; Durham statement; partnering with journals; digitization projects, open access
- Is there a forum for all law schools to assert commitment to preservation and custody of their own publications (whether analog or digital)---through LIPA? ALL-SIS?
- Insisting on permanent access and archiving rights with big vendor deals
- Participate in things like LOCKSS
- Communication with each other
- Help Hein (and other vendors) identify content for HeinOnline (feedback link)
- Work with vendors to increase “accessibility” of online content- e.g. contribute to “knowledgebases” of things like SFX, Serials Solutions, etc..

Digital Preservation: The New Frontier

- Understanding permanent “access” vs. archiving/copying rights (Stemper and Barribeau, “Perpetual Access to E-Journals: A Survey of One Academic Research Library’s Licenses,” 50 LRTS 91 (2006))
- PORTICO
- LOCKSS
- Schools of thought about preservation evolving
- True cost analysis of print vs. digital preservation for relevant collection
- More time preserving “born digital” periodicals?
- As a group, what makes us more comfortable relying on an online environment? Should academic law libraries develop a best practices document? Could it be combined with some best practices document re: cancellations?