




# MANAGING DISPOSITION OF DEPOSITORY MATERIALS:

Practical Tips for Efficient Weeding


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## BACKGROUND

- Mercer University
    - Founded in 1833
    - 11 schools and colleges
  - Jack Tarver Library
    - Mercer's primary undergraduate library
    - Serves five schools and colleges
  - Tarver Depository Library (0123A)
    - Selective depository – 48% prior to 2010
    - Serves Mercer academic community and 8th Congressional District
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## DOCUMENTS UNIT STAFFING

- One Librarian
    - 60% government documents
    - 40% Subject Librarian responsibilities
  - One part-time Documents Assistant
    - 20 hours a week
  - Student Workers
    - 10 to 20 hours a week
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## BIBLIOGRAPHIC CONTROL

- Integrated Library System
    - Innovative Millennium
  - Subscribed to MARCIVE services, 1998 – 2009
    - Enhanced GPO Database Service
    - Shipping List Service (SLS)
  - Documents Without Shelves (DWS) since August 2009
    - Now receive 100% electronic items
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## DEPOSITORY COLLECTION

- Documents collection on the main floor
  - Print materials – 118,344
  - Microfiche – 128,159
  - CD/DVDs – 1,725
  - Videos – 45
  - Maps – 1,436
- Electronic collection growth beginning FY 2009
  - Internet-only records
    - 3,556 (FY 2006)
    - 3,335 (FY 2007)
    - 8,054 (FY 2008)
    - 13,002 (FY 2009): Documents Without Shelves



## GOING MOSTLY ELECTRONIC

- Transitioning to a more electronic depository collection
- Deselecting tangible items through Amendment of Item Selections
- Retaining legacy documents and keeping key reference documents in tangible format
- Subscribing to Documents Without Shelves
- Tracking online documents usage
- Shifting to create more space
- Weeding depository materials



## WEEDING CRITERIA

- Understand and adhere to disposal guidelines (*FDL Handbook*, Chapter 5.14, p.15)
  - Statutory requirement of five-year retention
  - Offers Lists to be approved by Regional Depository
- Follow Discard List Procedures for Georgia Depository Libraries  
[http://www.libs.uga.edu/govdocs/depository\\_libraries/discardlists.html](http://www.libs.uga.edu/govdocs/depository_libraries/discardlists.html)
  - Use standard Discard List Form
  - Limit the size or number of a list (500 lines or less)
  - Follow naming convention
  - Use required mailing label




## WEEDING PURPOSES


- Discarding unwanted materials based on users' needs
- Offering materials to Regional and other depositories
- Providing shelf space for new materials
- Looking ahead: library needs more growth space
- Regularity of weeding
- Reviewing superseded publications



## SUPERSEDED DOCUMENTS

- Identify superseded materials using the Superseded List
  - FDLP Guidelines for Determining Superseded Materials
  - FDLP Guidelines on Substituting Electronic for Tangible Versions of Depository Publications
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## WEEDING STEPS

- Choose an agency
  - Review materials within agency domain
  - Create Offers Lists following template required by Regional Depository
  - Focus on one format at a time (paper, MF, or CD/DVD)
  - Check publication date for items on the List
  - Assign a number to the List (internal use)
  - Submit the List to Regional for approval
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# MANAGING OFFERS LISTS

## Create Offers List Log


- Offers List title
- Date sent to Regional
- Regional Accession number
- Date received from Regional
- Approved discard date
- Number of items discarded
- Formats

Offers List Title	Created by	Sent to UGA	UGA Accession #	Received from UGA	UGA Approved Discard	total #	bib records deleted	Note
Tanner Offers List 08-1	Tanner Library	9/24/2008	09-14	Received 9/29/2008	Approved 11/10/2008	1,462	250	MF
Tanner Offers List 08-2	Tanner Library	10/17/2008	09-17	Received 11/3/2008	Approved 12/10/2008	315	150	Paper/CD
Tanner Offers List 08-3	Tanner Library	11/26/2008	09-26	Received 12/5/2008	Approved 1/23/2009	495	200	
Tanner Offers List 09-1	Tanner Library	2/3/2009	09-48	Received 2/6/2009	Approved 3/12/2009	306	100	
Tanner Offers List 09-2	Tanner Library	2/13/2009	09-56	Received 2/19/2009	Approved 3/25/2009	391	150	
Tanner Offers List 09-3	Tanner Library	3/9/2009	09-68	Received 3/10/2009	Approved 4/14/2009	463	191	
Tanner Offers List 09-4	Tanner Library	3/23/2009	09-82	Received 3/26/2009	Approved 4/30/2009	290	24	
Tanner Offers List 09-5	Tanner Library	3/27/2009	09-85	Received 4/1/2009	Approved 5/6/2009	369	316	
Tanner Offers List 09-6	Tanner Library	3/30/2009	09-88	Received 4/6/2009	Approved 5/8/2009	390	85	
Tanner Offers List 09-7	Tanner Library	4/9/2009	09-99	Received 4/14/2009	Approved 5/18/2009	413	169	
Tanner Offers List 09-8	Tanner Library	4/13/2009	09-102	Received 4/14/2009	Approved 5/19/2009	412	182	
Tanner Offers List 09-9	Tanner Library	4/14/2009	09-105	Received 4/15/2009	Approved 5/20/2009	376	212	
Tanner Offers List 09-10	Tanner Library	4/28/2009	09-121	Received 5/14/2009	Approved 6/18/2009	377	201	
Tanner Offers List 09-11	Tanner Library	4/23/2009	09-117	Received 4/29/2009	Approved 6/2/2009	740	167	
Tanner Offers List 09-12	Tanner Library	4/30/2009	09-123	Received 5/14/2009	Approved 6/18/2009	315	210	
Tanner Offers List 09-13	Tanner Library	5/28/2009	09-150	Received 5/29/2009	Approved 7/3/2009	1,982	1	
Tanner Offers List 09-14	Tanner Library	6/26/2009	09-198	Received 7/1/2009	Approved 8/4/2009	637	195	
Tanner Offers List 09-15	Tanner Library	7/30/2009	10-16	Received 8/11/2009	Approved 9/15/2009	251	26	MF
Tanner Offers List 09-16	Tanner Library	7/31/2009	10-19	Received 8/18/2009	Approved 9/22/2009	1,175	270	
Tanner Offers List 09-17	Tanner Library	8/6/2009	10-25	Received 8/18/2009	Approved 9/22/2009	520	on hold	CD
Tanner Offers List 09-18	Tanner Library	8/11/2009	10-28	Received 8/18/2009	Approved 9/22/2009	1,797	221	
Tanner Offers List 09-19	Tanner Library	8/17/2009	10-32	Received 8/20/2009	Approved 9/24/2009	690	164	
Tanner Offers List 09-20	Tanner Library	8/19/2009	10-37	Received 8/31/2009	Approved 10/5/2009	623	99	
Tanner Offers List 09-21	Tanner Library	9/17/2009	10-53	Received 9/29/2009	Approved 11/2/2009	544	89	
Tanner Offers List 09-22	Tanner Library	9/17/2009	10-54	Received 9/29/2009	Approved 11/2/2009	3	2	CD
Tanner Offers List 09-23	Tanner Library	9/29/2009	10-58	Received 10/5/2009	Approved 11/6/2009	1,579	174	
Tanner Offers List 09-24	Tanner Library	10/7/2009	10-69	Received 10/15/2009	Approved 11/19/2009	1,625	121	
Tanner Offers List 09-25	Tanner Library	10/8/2009	10-60	Received 10/15/2009	Approved 11/19/2009	484	166	
Tanner Offers List 09-26	Tanner Library	10/12/2009	10-61	Received 10/15/2009	Approved 11/19/2009	27	0	
Tanner Offers List 09-27	Tanner Library	10/7/2009	10-64	Received 10/3/2009	Approved 11/27/2009	537	105	
Tanner Offers List 09-28	Tanner Library	10/29/2009	10-67	Received 11/5/2009	Approved 12/11/2009	624	207	
Tanner Offers List 09-29	Tanner Library	11/18/2009	10-77	Received 11/30/2009	Approved 1/4/2010	725	153	1 CD
Tanner Offers List 09-30	Tanner Library	12/3/2009	10-95	Received 1/8/2010	Approved 2/12/2010	549	445	
Tanner Offers List 10-1	Tanner Library	1/8/2010	10-101	Received 1/19/2010	Approved 2/23/2010	431	118	
Tanner Offers List 10-2	Tanner Library	2/3/2010	10-131	Received 2/8/2010	Approved 3/9/2010	432	147	1 VHS/1CD
Tanner Offers List 10-3	Tanner Library	2/4/2010	10-135	Received 2/8/2010	Approved 3/8/2010	377	85	
Tanner Offers List 10-4	Tanner Library	2/10/2010	10-142	Received 2/19/2010	Approved 3/26/2010	453	173	
Tanner Offers List 10-5	Tanner Library	2/18/2010	10-150	Received 2/23/2010	Approved 3/30/2010	401	113	2 Floppy Disks
Tanner Offers List 10-6	Tanner Library	3/2/2010	10-160	Received 4/6/2010	Approved 5/12/2010	476	42	
Tanner Offers List 10-7	Tanner Library	3/16/2010	10-166	Received 4/8/2010	Approved 5/12/2010	499	170	

## WEEDING PROCESS AND CHECKLIST

- Nature of Documents Weeding
    - Multi-step process
    - Rigid structure
    - Attention to detail!
  - Checklist
    - Created by Documents Assistant
    - Assign a checklist to each Offers List
    - Monitor several Offers Lists simultaneously
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## OFFERS LIST CHECKLIST

- Checklist Purposes
    - Ensure all steps related to weeding of materials are implemented properly
    - Streamline weeding process
    - Keep track of every single step in weeding process
    - Increase efficiency of Offers Lists processing
  - Checklist Content
    - Three columns (Steps, Date, Initials )
    - Main steps include: type, check, count, email, store, record, print, pull out, delete, mail, stamp, wrap, label, and discard
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OFFERS CHECK LIST 10-27 (P)/ UGA		INITIAL	DATE COMPLETED	E	F
1	Put Offers List items in SuDoc order on a cart or isolate them on shelves				
2	Type List (Titles, SuDoc #'s and Publishing Date) Put no more than 500 titles on list. Use UGA Offers List Template. Do not adjust column width, but row height may be adjusted to accommodate long SuDoc #'s or Titles, etc. Use complete titles for each piece.				
3	Check each piece against the completed typed list making sure all information is correct.				
4	Check Publishing Date - Each piece must be held for at least 5 years.				
5	Check SuDoc Order is correct				
6	Count pieces on list				
7	Spell check document				
8	Get approval from Liya before sending offers list to UGA				
9	Copy spreadsheet to desktop/Save with naming convention mercerlibrary_yyyymmdd(.xls)				
10	Email "desk-top" version to UGA at docsproc@uga.edu/then delete desk top copy ONLY				
11	Move Offers List from Student File to Reference/Gov Docs/Offer List				
12	Enter date sent to UGA on Offers List Log under Reference/Gov Docs/Offer List				
13	UGA will send email with their accession # to acknowledge receipt of offers list. Enter UGA accession # on the Offers List Log under Reference/Gov Docs/Offer List.				
14	UGA will send a second email with attached offers list highlighted with items that they are requesting along with approved discard date.				
15	Enter the discard date on the Offers List Log under Reference/Gov Docs/Offer List				
16	Save the offers list that we receive from UGA in Reference/Gov Docs/Offer List. Save using Tarver's Accession Number. Then delete our original list.				
17	Print Highlighted Offers List from UGA				
18	Pull the items UGA has requested				
19	Delete the items UGA has requested from Millennium / mark bib records with a red dot				
20	Record the number sent to UGA on the first page of the spreadsheet sent by UGA				
21	Mail items to UGA. Include a Copy of the First Page <b>Only</b> of the offers list. Use UGA mailing label.				
22	Delete remaining records from Millennium/ mark bib records with a red dot				
23	Record number of bib records deleted on the first sheet of the spreadsheet sent by UGA				
24	Delete OCLC holdings/including the records that were turned into Internet Only				
25	Stamp items with Depository Discard Stamp				
26	Once Discard Date has expired, approved items maybe discarded. Wrap items in newspaper and mark "TRASH". Stack wrapped items on the loading dock for discard.				
27	Enter total number of pieces discarded and sent to UGA on the monthly (green) Stat Sheet				
28	Put Working Copy of Offers list into a folder - label folder with UGA accession #				
29	Put folder "top" Shelf with other offers lists				
30					
31					
32					

Updated by Whitney McArthur on 9/17/2010  
G:\Student Assistant\Gov Doc Unit (student assistants)\Labels & Templates

## OFFERS LISTS CREATED

- FY 2009
  - 26 Offers Lists created
  - 17,946 total items discarded
  - 3,425 bibliographic records deleted
  
- FY 2010
  - 17 Offers Lists created
  - 8,566 total items discarded
  - 1,121 bibliographic records deleted





Offers List Log 2003-present.xls [Compatibility Mode] - Microsoft Excel

Offers List Log (0123-A Depository Library) July 2009 - June 2010								
Offers List Title	Created by	Sent to UGA	UGA Accession #	Received from UGA	UGA Approved Discard	total #	bib records deleted	Format
Tanner Offers List 09-13	Tanner Library	5/28/2009	09-150	Received 5/29/2009	Approved 7/3/2009	1,992	1	
Tanner Offers List 09-14	Tanner Library	6/29/2009	09-189	Received 7/1/2009	Approved 9/4/2009	531	195	
Tanner Offers List 09-15	Tanner Library	7/30/2009	10-16	Received 8/11/2009	Approved 9/15/2009	251	26	MF
Tanner Offers List 09-16	Tanner Library	7/31/2009	10-19	Received 8/18/2009	Approved 9/22/2009	1,175	270	
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Tanner Offers List 09-20	Tanner Library	8/19/2009	10-37	Received 8/31/2009	Approved 10/4/2009	623	99	
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Tanner Offers List 09-23	Tanner Library	9/28/2009	10-58	Received 10/5/2009	Approved 11/8/2009	1,579	174	
Tanner Offers List 09-24	Tanner Library	10/7/2009	10-59	Received 10/15/2009	Approved 11/19/2009	1,625	121	
Tanner Offers List 09-25	Tanner Library	10/8/2009	10-60	Received 10/15/2009	Approved 11/19/2009	484	166	
Tanner Offers List 09-26	Tanner Library	10/12/2009	10-61	Received 10/16/2009	Approved 11/19/2009	27	8	
Tanner Offers List 09-27	Tanner Library	10/21/2009	10-64	Received 10/23/2009	Approved 11/24/2009	531	105	
Tanner Offers List 09-28	Tanner Library	10/28/2009	10-67	Received 11/6/2009	Approved 12/11/2009	502	207	
Tanner Offers List 09-29	Tanner Library	11/18/2009	10-77	Received 11/30/2009	Approved 1/4/2010	725	153	1 CD
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Tanner Offers List 10-7	Tanner Library	3/16/2010	10-166	Received 4/8/2010	Approved 5/12/2010	489	170	
Tanner Offers List 10-8	Tanner Library	3/25/2010	10-174	Received 5/6/2010	Approved 6/10/2010	547	139	
					Tanner MF Total:	251		
					Tanner CD Total:	523		
					Tanner Books Total:	17,172		
					Total Bibs Deleted:	3,425		
					Tanner Total Bibs Discarded:	17,946		
								17,946

## FINAL THOUGHTS

- Make a long-term plan
- Provide well-constructed training
- Pay attention to details
- Use the checklist to track process
- Recognize team work
- Celebrate achievements



# QUESTIONS



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