

Virtual Snacks with Council - Weeding through the Options: An Overview of Various Discard – Transcript of audio

I will be the MC for meeting room B today. Before we get started I would like to share some housekeeping reminders. Please use that chat box for technical issues. We are recording the conference and all registrants will receive links to their recordings after the event. Please join me in welcoming our facilitators today, Jennifer Morgan, Jen Kirk, and Renee Bosman. Jennifer, the floor is now yours.

Thanks, Donald. I'm going to turn on my camera. Hi, everybody. Welcome to our snacks with counsel session. Wading through the options and an overview of the various discard processes in that FDLP. I'm Jennifer Morgan and I'm the depository coordinator of a selective depository, the law library and Indiana University in Wilmington, Indiana. With me are my fellow councilmembers, Renee Bosman and Jen Kirk. Agendas the depository coordinator at Utah State University and Utah State is a regional depository. Renee is the depository coordinator at the University of North Carolina at Chapel Hill, which is also a regional depository. Can we have the next slide? Our informal snacks session looks at the various discard processes within FDLP libraries. We hope that you will share your experiences with us and her best practices for dealing with weeding and discard projects. We will also ensure -- --. Please contribute your comments and your questions by using the chat. First step, we are going to start with a discussion question. Next slide. We would like to know why you chose to attend this counsel snacks session on weeding and discarding. Please tell us why you are here in the chat. Charlie gets the ball rolling. Because she is suffering from what her predecessor left behind. John says, waiting project is in our future. My library is currently going through a weeding project future plans from Francis. Need to wait for space purposes and wants to do it right. Francis is in the same boat as Charlie. Amanda is new to -- and wants to make sure the weeding and discarding process. Kate says she doesn't have an active weeding program here. I didn't either, Kate. We kept everything, but now I'm here at our law library. And we need more space up on the fourth floor. Fortunately we have an off-site storage facility where I am trying to send things. Elizabeth says the library just -- it is hiring contractors to do a weeding project. I would like to know more about how that works with the contractor. Ronnie wants to know how the libraries do it? Sounds like Charlie's boat. Leslie is making plans to weed. Debbie is working on weeding to free up needed space. Daisy want a refresher on what selective depository can and cannot do. Jessica is new to the position. A lot of cleanup. Scott Briggs is now the only person who is full-time. Used to have a clue on how it works. We will be discarding to make more room. Wants to learn how to better conduct a future weeding project. Emily says she is currently working on weeding unused sections of documents. I would like to know more about how you determined what is used and what is unused. You use circulation statistics? Do you check for dust? Jenny is new to the role and wants to understand the process better. Let's skip ahead. Welcome to the conference. We want to stay on top of current practices. Barber has a good question. If GPO goes fully digital I'm wondering what the process will be for weeding out. Barbara, if the GPO goes digital, that is going forward. You still have your legacy collection, so there will be no requirement for getting rid of her print at all. Elizabeth is worried about things getting tossed out. I have that fear also, Elizabeth. Knew as a coordinator. Terry wants to be prepared in case she is asked to do a major weeding project. Polly is looking for tips for speeding up the discard project. She's in the process of eating now. Amanda is in a temporary location and has less space in the library going back. Charlie points out she is also new to FDLP weeding. Kimberly is new to the process. Caitlin wants to see how other libraries handle the weeding process. That's what I'm interested in as well. This summer I started our first weeding project and I have been in this position since 2001. In 21 years this is my first weeding project. Erin is losing space. Doors is superseding from the list. New perspective gives. People want to know best practices. Need to wait for space purposes and become more digital. We have a whole floor of historical collection, basically. Chris says there are regionals but

it's good to hear what others are doing. I agree with that. Joyce says they hardly weeded if ever since 1966. Same here. People are running out of space. Hoping library admin doesn't move it to storage before the un-catalogued documents are catalogued. Yeah. That is important. Abby is curious as to how it all works. Much is not catalogs. Would there be a weeding process for digital in the future? That's a good question and, I'm on the task force and my subgroup is impact on depository libraries. That may or may not have come up. If you haven't read the report, the comment period is over but you can still read the report. Let's see if that is mentioned. It might be, I don't remember. I don't know what is and isn't being used because there is not a way for any of the materials to be in the stats. John says, he is a deciding what to weed versus what to contribute to preservation program. Committee hearings. Vicki says she has a weeded materials every year since she came to her library 28 years ago. Brian says stewardship aspect seems to possibly contradict themselves. I would like to hear this perspective. If we have any preservation stewards out there who have done weeding, maybe chime in on that. From my perspective, we are a preservation storage for quite a few titles. Primarily, I wanted to make sure that we do have the correct copy and that they will never be under consideration for weeding. We have this off-site storage facility and in Indiana we have this archive were some of the major depository libraries have divvied up the numbers and we are responsible for certain docs going into what we call the Indiana light archive. Laura says she doesn't particularly like records received and sometimes they weed the digital items afterward. Came to this session to get ideas for weeding the digital items. Wants to be sure we are doing what we should be doing Amanda says, interested to hear others. Our off-site won't take docs since they get superseded, et cetera. We don't supersede here at my library because we are a research institution and law library. We don't supersede documents because they are --. Things like older editions of the U.S. code or the Code of Federal Regulations, they are always needed for the legal research purposes. Charlie wants to integrate from Elsie and go back to SuDoc. She says, yes. She hates it. Nobody can find them. I feel your pain, Charlie. Heather says she is looking for an introduction to weeding and to hear different perspectives. Vicki says the digital documents are easy to weed. Vicki, do you have a policy on weeding your digital documents? Does anybody have policies? D put that in your development policy? I don't have one here because we don't do any weeding. Lori is trying to transition to digital and are in the process of getting rid of tangible materials. Kate says, Charlie, that is interesting. Kate wants to talk to Charlie about why she wants to go back. Mary says, no, but we should. Yeah, I would like to have one too. Charlie is going to rent. If I'm weeding out materials I try to export an electronic record from OCLC so that there is still a form of the material in our records. Vicki is in the process of completely going through the item selection profile and deselecting many item numbers. Elizabeth has inherited a lot of outdated policies. Jen Kirk says, we call that process substitution. Jen and Renee, do you think we are ready to move on to the first poll?

Yeah, let's put the poll out there.

So you guys, you can keep talking in the chat. Here comes the first poll. We would like to ask you about, can you advance the slide? For our first poll we would like to ask you about your level of experience with weeding or discard projects in your library. You can select any of the responses that apply and then you can also give us any additional information in the chat. We are running that poll. I just submitted my poll. If you have anything to say go ahead and put that in the chat. The poll results will be coming up shortly. The poll has ended. Donald, are you running that poll? When do we see the result? There it is. So, 54 out of 103 of us are currently weeding or discarding materials. Next highest response is, planning. 40 people are planning a future or weeding discard project. 35 of us have done a big weeding or discard project in the past. Then we have 31, no answer. 15 don't know how to weed or discard. 11 other --. 6, none of the above. I'm going to close my poll.

The poll runs for about a minute and it takes about 20 tickets to compile.

Okay, thanks, Donald. Thomas says, they don't have anything formal for weeding the digital records. We added about 36,000 records a few years ago. Charlie --. Let's see. Lucky enough to have hands on

weeding instruction and practicing. Oh, cool. Jen only with duplicates because she is a regional. Things get complicated. That doesn't sound complicated. Were are you? Who doesn't have a regional? Elizabeth. Elizabeth, inventory maps before she left. Mary selected other because she knows how discarding worked but doesn't know how to depict what to weed. Amy only with duplicates and triplicates. He provides guidance. He provides excellent guidance as I reached out to him this year. Margaret, very familiar with weeding. There's so many great responses here. They did weed another document several years back. Charlie says digital records are a consortium control for understanding as they have everything. We have some people currently weeding. Jen says to Amy, they have up to eight copies of some locally relevant items. Jen says, Wyoming. Is that the selective with no regional?

That is correct. Wyoming does not have a regional.

Vicki says, Michigan, South Carolina --. They have recently started using FDL exchange to post offers we would like to weed from our collection. I do that as well because even though I am not required to in some circumstances, I want to make sure that if I'm getting rid of a print copy, if somebody is out there in the country who want it, they can see that they can get it from us. Vicki corrected South Carolina to South Dakota. John Olson coordinated the first big weeding project with other subject librarians. That sounds interesting. Mostly older NASA docs. Elizabeth agrees. Kelly Smith has done lots of weeding but is new to using FDL exchange. Thanks, Abby, for clarifying Michigan and South Dakota are served by the University of Minnesota. Devisee --. Kate wants a little clarification from --. Jen follows the five-year rule. I haven't found that easy to use. I have reached out to GPO for help and they did a one on one live with me. That was very helpful. Deb says circulation reports. Basing some weeding on monthly PURL reports. Deb doesn't do soft check out for shelves. We used to do that a long time ago when the --. I used to be head of circuit. They were instructed to bring all of the books they found not shelved, laying on tables, and bring them down and check in. It was cause --. That went into our usage statistics. I don't know if they are still doing that. Kate says a lot of the non-material used in-house without being checked out. We use Circe for our ILS and they do that browsing staff. Jen, you are up next.

Let's advance our slide. Thanks, everyone, for sharing so far. Our next discussion is a yes or no question. You don't really have to put it in. This is an introduction to what we are going to be talking about next. Do you know how to find guidance for weeding? A lot of you have already said that you may be new to weeding. We are going to go point out a few areas to get you started. Next slide, please. There are two main areas to turn to from FDLP aside from our wonderful support librarians. On the FDLP.gov website you can find legal requirements and program regulations which we call LRPR . These are what really establish the roles for reading materials. They identify both depository types, thanks, Jennifer, has thrown a link in the chat it looks like. It calls out to the two different roles that depositories have. We have selective depositories which can dispose of materials after they have retained them for five years and upon the approval of their designated regional depository. Obviously, original depositories are separate and are held to a different standard and are encouraged to retain materials for as long as they are able and to oversee the weeding processes for their selective depositories. There are certain criteria for different library types. Enteral agency libraries, highest state appellate libraries, original depositories and selective depositories not served by regional, which we have already seen in the chat room a all have different requirements for their materials. LRPR is where you can turn to , to in writing what those regulations are. In addition to the regulations, GPO provides guidance. Some of you may have remembered Pirates of the guys --. These are more about the tips and tricks from GPO that have retained over working with thousands of libraries. We have linked one here for weeding a depository collection. These are great starting points if you are looking to make sure you are doing the right thing. The other thing to do is to contact your regional coordinator. You can contact some of our user support librarians at GPO itself. These are where you can turn to, to see the letter of the law. Can you advance the slide for me? Thank you. The other place you can turn to is your regional library. Do you know how to identify your libraries regional library? Go ahead, Donald. You can find your regional coordinator

contact, if you don't already know it, through the FDLP directory. This is hosted through ask GPO. Here is a screenshot of what this slide looks like. I have circled in yellow, you can click to see every regional federal depository library in the list. Many people have their selective depositories report within their own state but there are several special cases. A few states have two regionals in the same state. You will need to know which one to talk to if you are in California or Texas or Louisiana. There are many regionals like myself that span multiple states. I'm the regional coordinator for both Utah and Nevada. So, that is how you can find out who your regional coordinator is. The importance of this is different regionals have different processes. Will talk about this in a little bit when we get into the nitty-gritty of how to actually weed. Renee will talk about that. This is how you find your regional coordinator. Renee, are you good to go for the next section?

Yeah, sure. I think we are starting off --. I think we are starting off with another poll. We are going to do a poll. Why do you weed or discard materials? We won't spend too much time on this. We got some good discussion earlier about upcoming weeding projects, but it is also nice to get a visual with numbers. Space issues, keeping up current collection, whether admin requires it or data-driven decisions. We talked earlier about stats. I will give everyone a moment to finish up that poll. We will wait for the numbers. It looks like time is up. We will get the numbers shortly. Not a lot of surprise. Overwhelming me, folks who answered have space issues or they are removing specific formats. Thinking about weeding some of those a floppies, if you still have them in your collection. DVDs or CDs. We have to keep all of that because we are regional. We have run into issues with our CDs not being usable. It takes a lot to get the data off of them. There are also folks who try to keep a current collection and some folks making data-driven decisions. It's nice to see that very little of the weeding is happening from a top-down admin requirement. That is nice. It sounds like coordinators are the ones who are taking ownership of these projects, which is great to see. I should open the chat too and see if anyone has put anything in there. Folks are getting rid of superseded things. Making the collection more relevant to patrons needs. A few folks are saying the stuff is not relevant to patron concerns. Bad selection decisions. Yeah, one of the last things I did was get out from and 80 something percent selective to a 50% selective and right size our collection. I don't know if my person who came after me did any weeding to go along with that, but that certainly helps.

Can I jump in really quick? I think the most important thing before we weed is to look at selection profiles. Make sure that you are stopping things from coming in that you're going to have to retain for 5 years that you know don't fit your collection policies. Since we are already on the weeding topic, avoid this problem for your predecessors and make sure you right size that selection profile.

When I talk to selective's who are undergoing large projects, that is always the first step. Stem the tide of things coming in, if it is a space issue, and then go ahead and deal with the collection that you have on hand. We can go ahead and move on to poll three. What is your approach to weeding? Regular maintenance, for those of you who are keeping a current collection. A lot of folks are doing project-based weeding or weeding until you absolutely have to. While this poll is going, something I wanted to jump in earlier and answered a question. There were a few things in the chat from Kate and Charlie about SuDoc collection versus LC collection. At 4:45 Jesse is doing a session on loops is. It is a strategy to assist staff to identify gov docs that are not in the SuDoc collection. That's today for those of you who would like to start about part of your collections that are not in SuDoc. Let me get back to the poll. Jen and Jennifer, while I'm looking at the poll, I am not monitoring chats. If there is anything in particular that you want to point out, jump right in.

Will do.

It looks like most folks are doing project-based weeding and some regular maintenance as well. A few folks either are not doing weeding or weeding until they absolutely have to. Maybe some of those space issues bump up against that.

I was going to answer Elizabeth's question about people weeding because of lack of space. She asked if that is because the library is out of space rather than your shelves? Being a law library, we save a lot of materials like --. We have a huge state code collection. If you ever need a superseded state code, we have all of the states. They are on the fourth floor along with government documents and they need more room every year. One of the reasons I have to weed from the fourth floor is to make room for these state codes. The state codes to use them, the superseded ones, you have to see them in person. If you need a congressional hearing or a report, that is more easily retrievable from the offstage source facility. It's kind of like Tetris. Finding places to put things and move things around where they are more easily retrievable. I have tried --. We have two depositories on this campus, the library in the world library, which is the main library. Before put anything in, I have to make sure it's not already there. I try and figure out whether or not it is digitized. Is it in? Hottie has -- they have all the records in the catalog so whatever they want to digitize, they ask us for. They create poll lists and our main library works with them. I cannot initiate any digitization with Hauty. If I can't get Hauty to digitize, I don't have the resource to do it. I thought --. I would want to send things to Heinz because at least it is digitized somewhere. That's what I'm thinking.

Thanks, Jennifer. I'm not seeing much else. I'm going to go ahead and advance the slide. We can talk a little bit about some of the systems and processes for this work. I'm going to talk about these a little out of order. When Jen and Jennifer were shopping for this we kept going back to this phrase like, ask regional aster regional, your mileage may vary. These are some of the things that are used but certainly talk to your original to see what their procedures are here in North Carolina when I start my position seven years ago folks were still sending lists to the original. I know some regional still use this. Someone would email me an Excel document with a list of items and then the students here would self check our collection to see what we needed. I would email back and say what we wanted. Sometime around the time I started, the documents disposition database had been up and running prior to my start here in 2015, but one of the things I did when I took over this position was getting all North Carolina libraries using the ASERL database. Our libraries within the region will upload their offers list to the ASERL database and then their original against -- for the first 15 days it goes to other libraries within the state and other regionals and ASERL regionals there is a pecking order for being able to view and claim documents. FDLP exchanges very similar to the ASERL database. For those of you not in the ASERL region, you may be using exchange and sharing with the original that way, uploading lists into the system and then your original gets to view them in exchange and claim them through exchange as well. I see a question coming in the chat about offers lists and compiling those and I know earlier there was a question about tips and tricks to make the process faster. A lot of our libraries within North Carolina will pull them from their ILS we use Sierra here and I know there's a way to do it. I can't tell you how because that is out of my Will House. But you can pull something from your ILS into at CSV format and then get that into exchange or the ASERL database. That helps greatly. You are not sitting there typing out manually typing document by document lists for getting this work done. And then, other than those, some regionals have regional specific databases. Jennifer had mentioned when we were approaching for this that Indiana uses its own offers database outside of exchange, something similar to exchange or ASERL. And then sometimes folks, you will see if you are on -- you might see folks posting to the listserv as well. I know here I have folks start with a -- and the stuff stays in the database for 45 days. If it is older material, I ask North Carolina selective's to then post that material to exchange or to check GPO's needs lift . Just to do due diligence and cast a wider net especially if they have pre-1976 stuff for more like turn-of-the-century kind of stuff, really. That's kind of how we do it here and I know other regionals have similar workflows. I'm going to go through some of this chat to see if I have missed anything. Jen mentions that she points people to others list if they don't have their own. I will do the same as well. If I know, if I have reviewed offers and they have been put in ASERL, I might know other regionals out there that are collecting in a particular area and just refer people to those. ASERL and FDLP exchanges

different templates for both uploads. ASERL will allow you to download your offers list and then there is a little bit of massaging that has to happen before you upload it into exchange. They try to make it easy for folks. It looks like New York is required to use exchange. Some other folks talking about that. This could be a good segue to our next poll question about what systems folks use. Should I be more concerned with filling in collection holds? That's a really good question. As original, I have my students self check all of the offers that come through for us to fill in collection gaps if you are a selective and you have a little bit more flexibility, I would approach that -- this is just my advice -- probably the same way I would approach selection and weeding. It is thinking about your constituents and their needs. It could mean that there are some agencies out there that you might be more concerned with filling in collection gaps and some agencies where it is not a huge deal if you don't have everything in there. If I had a limited amount of time and space and staff time, I would be focused on filling collection gaps in areas that complement the programs at my institution or what my constituents are using. Poll results. 61 folks are using FDLP exchange, another 18 are using the ASERL database. Those are all structured ways. 28 are sending their lists to the regionals. And some are still posting to listserv's.

Following up on that, how to curate, if you have specific areas you're looking to fill collection gaps, this is something you could share more widely through that new depository highlight section in the FDL directory. We have put hours there. We are actively trying to get a complete collection of soil surveys. I make sure to put that in there. I'm going to throw that in the chat for folks because that is a relatively new way to communicate out to the whole depository community.

That is a great idea. Like I said, I will connect [Indiscernible - background noise]

This is Jennifer. I saw Abby from GPO post in the chat the link for guidance on how to enable national offers in the FDLP exchange. She says you enable national offers for any time period you wish. Every offer you enter will be offered nationally. I just wanted to point out, I'm going to put this --. Let me see if I can copy and paste into the chat. The link to the national collection of U.S. government public information. I noticed I put a quote in there, please offer your FDLP discourse nationally via FDLP exchange. Not all regionals require the use of the FDLP exchange but if you offer your materials nationally, it is going to help depositories outside of your region develop their collections.

This could be a good time to skip forward. We have a slight about best practices but we can kind of talk about that while we have our FAQ slide up because we have links there to the FDLP needs lift and such. We can have that up while we talk about best practices. If we could advance to slide -- the next one after this discussion question. We can leave this up and just ask the discussion question about folks sharing practices that have worked for them. Feel free to jump in and answer any of these that you are seeing.

I think -- we are seeing a lot of conversations about how long it is. I understand the question entirely, especially as our regional who has to review these things. Sometimes, depending on how long the list is, we can turn it around really fast. Sometimes it takes the time it takes, which to me as original, the most important thing is communication with my selective's to make sure we are on the same page and juggling our needs and requirements in the best ways we can. Unfortunately for the folks in the chat, we can't say this number of days is sufficient because it is going to change based on each offer.

I talked to my regional about the turnaround time and we sent a poll out to our state listserv about shortening it. I think he lowered it to 15. One we sent our regional our discard list, they are short. We don't put all --. We don't put all of those serial numbers on that list. He gets them turned around pretty quickly.

Serial numbers are the type where they can do that. It's an entire long-run of something that is not a serial.

I don't have a length limit on mine. I also tell folks if they are going to offer to exchange after ASERL, even a few days is enough to paying someone else's needs lift too. If GPO has their needs and their and

whoever else has their needs lift in, it's enough to at least notify someone has that and you make a match.

I see several plus once to John's question in the chat of what will there ever be an update to the 2002 superseded list from GPO? I'm not from GPO but my understanding is, probably not. Renee, does that sound correct you?

I haven't heard any talk of that as a forthcoming project.

I think the attention is on how to better connect folks that are trying to fill those historic gaps through the work that Abby and Megan are doing with FDLP exchange. Abby, thanks so much for weighing in on the chat. It's about -- we are trying to focus more on, what is a healthy election for each depository library? That takes some time and attention. We have seen from the chat that folks are considering, what do their patrons need it now? What does that look like? Is less about, I have had this for five years and now I can get rid of it. It is about, is this something that benefits the community members that use my library? I'm really glad to see that happening in that chat.

A couple of other things in the chat I want to point out. Someone mentioned postage. It is tough when you cannot pay postage. You can also -- this is more trouble than it is worth as far as reimbursement. I think there is also a way to ask about postage. If that helps. There was something else in the check -- chat I wanted to address. There has been some talk about microfiche recycling. That is a question I get a lot, about how to risqué -- recycle microfiche. It's a lot of -- there is no one answer because it depends on local recycling. I think someone put some resources in the chat for that.

There is also a conversation going on about collection development policies and potential for repository to share those. I think that is a great idea. I haven't seen that. If anybody else who has longer legs in the community than I do, and I'm not aware of it, please do that in the chat. If the coordinator certificate program, which I think they are going to run again in 2023, is a virtual training opportunity for coordinators. You don't have to be a new coordinator to take it, but there is a whole section where the cohort goes through either revisiting their existing collection policies or writing one if you don't already have one. That is an opportunity for you to see a considerable number. Is an opportunity, if you're not familiar with that, it is a way if you're in that cohort, you have dedicated time to write that because you have already gotten your administrators approval to be in that.

Do you see Gina's question? Was there ever a requirement that materials be destroyed instead of given to local, interested people after the offers?

We are at time for this. I'm so sorry. We are having a fantastic conversation but I have to say we need a break.

when the recording is made available, the chat will be there as well.

Correct.

My understanding, to answer that last question, there is a requirement other than you can't sell them. Right? Thank you, all.

Thank you for the fantastic call. Up next, government images. Unique challenges and underserved populations. We hope you will continue to join us. Thank you, everyone.

thanks, everybody.

Thanks, Don. It was good to work with you.

Bye.

Bye. Do you want to go ahead and try doing an audio check?

I'm here.