

**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

#### DOCUMENTS UNIT STAFFING

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

#### BIBLIOGRAPHIC CONTROL

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

#### DEPOSITORY COLLECTION

- Documents collection on the main floor
  - Print materials 118,344
  - Microfiche 128,159
  - CD/DVDs 1,725
  - Videos -45
  - Maps 1,436
- o Electronic collection growth beginning FY 2009
  - Internet-only records
    - o 3,556 (FY 2006)
    - o 3,335 (FY 2007)
    - o 8,054 (FY 2008)
    - o 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
- o 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

- 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- Reviewing superseded publications

#### SUPERSEDED DOCUMENTS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

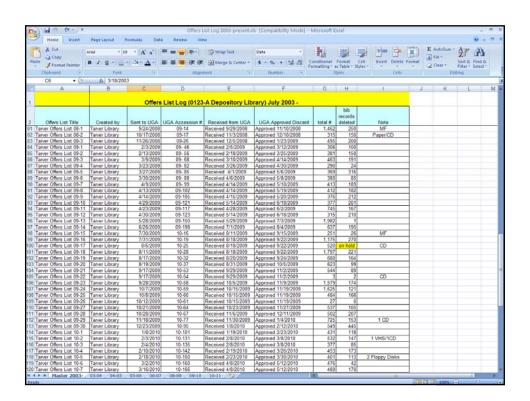
#### WEEDING STEPS

- Choose an agency
- o 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

#### 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



# 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

#### 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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4	Α	В	С	D	E	F
		OFFERS CHECK LIST 10-27 (P)/ UGA	INITIAL	DATE COMPLETED		
Г	1	Put Offers List items in SuDoc order on a cart or isolate them on shelves				
Г		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				
	2	accommodate long SuDoc #'s or Titles, etc. Use complete titles for each piece.				
Г	3	Check each piece against the completed typed list making sure all information is correct.				
Г	4	Check Publishing Date - Each piece must be held for at least 5 years.				
	5	Check SuDoc Order is correct				
Г	6	Count pieces on list				
	7	Spell check document				
	8	Get approval from Liya before sending offers list to UGA				
0	9	Copy spreadsheet to desktop/Save with naming convention mercerlibrary_yyyymmdd(.xls)				
1	10	Email "desk-top" version to UGA at docsproc@uga.edu/then delete desk top copy ONLY				
2	11	Move Offers List from Student File to Reference/Gov Docs/Offers List				
3	12	Enter date sent to UGA on Offers List Log under Reference/Gov Docs/Offers List				
		UGA will send email with their accession # to acknowledge receipt of offers list. Enter				
1	13	UGA accession # on the Offers List Log under Reference/Gov Docs/Offers List.				
		UGA will send a second email with attached offers list highlighted with items that they are				
5	14	requesting along with approved discard date.				
5	15	Enter the discard date on the Offers List Log under Reference/Gov Docs/Offers List				
		Save the offers list that we receive from UGA in Reference/Gov Docs/Offers List. Save				
7	16	using Tarver's Accession Number. Then delete our original list.				
3	17	Print Highlighted Offers List from UGA				
9 _	18	Pull the items UGA has requested				
) _	19	Delete the items UGA has requested from Millennium / mark bib records with a red dot				
1	20	Record the number sent to UGA on the first page of the spreadsheet sent by UGA				
		Mail items to UGA. Include a Copy of the First Page <b>Only</b> of the offers list. Use UGA				
2	21	mailing label.				
3	22	Delete remaining records from Millennium/ mark bib records with a red dot				
1	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				
5	25	Stamp items with Depository Discard Stamp				
		Once Discard Date has expired, approved items maybe discarded. Wrap items in				
_	26	newspaper and mark "TRASH". Stack wrapped items on the loading dock for discard.				
L	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				
				y McArthur on 9/17/2010		
		G:\Student Assistant\Gov Doc U	Init (student assist:	ants)\Labels & Templates		

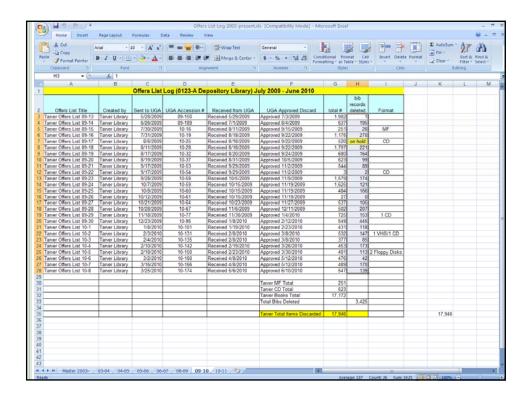
## OFFERS LISTS CREATED

#### o FY 2009

- 26 Offers Lists created
- 17,946 total items discarded
- 3,425 bibliographic records deleted

#### o FY 2010

- 17 Offers Lists created
- 8,566 total items discarded
- 1,121 bibliographic records deleted



### 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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