Summary of research and staff recommendation regarding collections tracking

In response to the Library Advisory Board's motion to research a method to accurately record the number of books discarded and the reason each book has been discarded, selectors worked with CCRLS staff to identify tracking methods to test.

There is already a process in place to track the number of items discarded.

The reason each book has been discarded is a nuanced decision. Selectors are responsible for the entire life cycle of collection development, including selection, evaluation, withdrawal, and replacement decisions. Items are often discarded for more than one reason (for example, an item that is identified because of poor condition, coupled with lack of use, may be discarded, versus an item in poor condition that maintains high use that is replaced). No item is automatically discarded due to its presence on a review list. Appropriate Library staff evaluate each item and make deselection decisions on a case-by-case basis. It is not standard practice to track this decision-making, which is not easily accommodated for in the library database and is a time-consuming process.

CCRLS staff helped identify four potential methods of tracking. The only long-term option to keep these types of records is to have them kept outside the library database as item records are removed after items are physically withdrawn. No other CCRLS library is doing this type of tracking.

Selectors completed time studies using sample sets of similar items in each of the following methods, in addition to a full day's time study on a work day including collections work.

1. Routine – no tracking
   a. Benefits: This is the normal method used in most public libraries. Most efficient and streamlined process. Does not require stopping to categorize, sort, or record additional information.
   b. Disadvantage: Does not capture reason an item is deselected.

2. Track on spreadsheet (item barcode, reason why item is being discarded, last copy status, is item being replaced)
   a. Benefit: Captures most nuanced, full picture of decision making.
   b. Disadvantage: Increases staff time. Most inefficient. Stored outside the system in a separate document. Barcodes would need to be matched up with specific titles (also time-consuming and not factored into the percentage increase in time).

3. Input data into item record using a dropdown field and the following categories: REPLACE (anything being replaced), CONDITION, LACK OF USE, OUTDATED CONTENT, EXCESS COPY, DATA CLEANUP, MISC (with instructions to make a note of the reason in the staff note field).
   a. Benefit: Captures some information about deselection decisions.

b. Disadvantage: Increases staff time and adds inefficiency. Codes do not capture the nuance of the collection decisions and that often there are multiple factors that contribute to an item's deselection. Data generated is not readily useful because item records are deleted bi-monthly. Tracking information would exist on a separate report which would have to be searched separately.

4. Sort items by the above categories and input data into item records by updating item records in batches.
   a. Benefit: Captures some information about deselection decisions. Least inefficient of the tracking methods.
   b. Disadvantage: Increases staff time and adds inefficiency. Codes do not capture the nuance of the collection decisions and that often there are multiple factors that contribute to an item's deselection. Due to sorting and scanning items separately, higher likelihood of introducing user input error. Data generated is not readily useful because item records are deleted bi-monthly. Tracking information would exist on a separate report which would have to be searched separately.

Staff's recommendation

In order to increase transparency, we recommend doing detailed spreadsheet tracking in May 2019 and creating a detailed report. This report would include the percentage of items withdrawn for condition versus lack of use, etc., as well as examples providing the full picture of decisions made by staff. The sample would include not only items that are withdrawn, but also those that are pulled for review and put back on the shelf, sent to mending, etc., to more accurately reflect the collection maintenance decisions being made. Selectors will continue to be available to answer questions about specific titles and subject areas.

After evaluating the idea of doing ongoing tracking and the methods available, we cannot responsibly recommend introducing inefficiency into any collections processes, due to our budget, staffing levels, and the timeline of getting collections ready to move out for the seismic retrofit. Averaging a sample set of the work of selectors, these tracking methods took up to roughly 56% more time than our routine process. The tracking method that captures the most nuance that would most satisfy the desire to be able to produce a full accounting of a specific item's disposition is also the most inefficient. We are not presented with any options that are efficient and also create meaningful data easy to access. Even the most efficient of the tracking methods tested adds time to each item reviewed, which adds up over the course of the year and between all selectors.

Based on our sample of the work of 4 SPL selectors, we estimate that tracking deselected items and outcomes results in the additional workload of approximately 780 hours annually. This translates to 780 hours of valuable staff time that can't then be used for strategizing service coordination, helping patrons directly, developing new collections, creating and implementing outreach and other programs, and

developing partnerships. That loss would have a ripple effect on all staff across the organization and would ultimately have a negative impact on staff capacity to serve patrons.