Library Managers' Handbook

This manual is designed for use by library managers and staff of Shortgrass Library System member libraries.

Last updated: June 27, 2019
Compiled by: Samantha West, Client Services Librarian

Introduction

Welcome! This manual is intended for use by managers and staff working in Shortgrass Library System (SLS) member libraries. Whether you are just learning the ropes of your position or you are a veteran library manager, we are sure that the information contained in this volume will be highly useful to you.

This manual is just one of many tools available to help you succeed in your position as library manager. Make sure you familiarize yourself with it, and do not be shy about asking questions! Other ways you can become comfortable with the system and its services include:

- Visit the Shortgrass website (http://www.shortgrass.ca) to see what services are available to you and your patrons;
- Get in touch with our Chief Executive Officer, Client Services Librarian, and/or Manager of Systems and Technical Services to find out more about how we support your library (and don't worry -- we'll be in touch as well);
- Familiarize yourself with your library's services and collections. Make note of all your questions and don't be afraid to ask them;
- Review your library's Plan of Service and ask your library board if you have any questions about the document's development or contents. If your plan is expired or close to expiring, contact SLS headquarters or PLSB for more information.

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What is a Regional Library System?

A library system is a collaborative solution for providing cost-effective and efficient public library services. There are seven regional library systems serving Alberta: Shortgrass, Chinook Arch, Marigold, Parkland, Northern Lights, Yellowhead, and Peace. Shortgrass Library System consists of 14 individual member libraries organized in a system that collectively serves the library needs of southeastern Alberta.

Like peanut butter and chocolate or pineapple on pizza, some things are just better together, and that includes libraries! By working together as a unit, Shortgrass member libraries are able to accomplish more and provide stronger services to library patrons than any one library could do on its own. As a result of combining resources, all member libraries are able to offer their patrons a much wider variety of materials and resources than they would otherwise be able to do alone.

At Shortgrass headquarters in Medicine Hat, a team of (absolutely lovely) library specialists work hard to ensure that member libraries receive stellar service and assistance. Between consulting, ordering, processing, and cataloguing materials, maintaining technical services, and more, the team is always busy working to provide the strongest services possible.

Maps below: the area served by Shortgrass Library System; Alberta's library systems.

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MISSION STATEMENT:

Shortgrass Library System provides quality library support services to member municipalities and partners.

SHORTGRASS LIBRARY SYSTEM

Key Facts
105,725 Population
26,590 m2
11 Municipalities
14 Member Libraries

Plan of Service
2017-2019

VALUES:
- Sustainable, Flexible & Efficient High Quality Service
- Innovation
- People (Internal/External)
- Fiscal Responsibility
- Intellectual Freedom

GOAL 2

Provide sustainable, flexible, innovative and responsive services in all areas of system operations.

OBJECTIVES:
- Continue providing regular opportunities for member library feedback.
- Evaluate staff satisfaction to ensure sustainability of services.
- Evaluate operations based on Lean Six Sigma principles.
- Facilitate the provision of library resources to meet the needs of our communities.
- Develop relevant & timely performance measures to allow for objective evaluation of services.
- Employ suitably qualified staff to ensure provision of excellent services.
- Participate in the Provincial Resource Sharing Network.

GOAL 3

Strive to ensure reliable, high speed internet is provided at all member libraries.

OBJECTIVES:
- Collaborate with Public Library Services Branch, SuperNet providers and municipal partners to improve current service levels.
- Explore funding opportunities to enhance services in area with less reliable connections.
- Maintain technology infrastructure necessary to provide high speed internet at member libraries.
- Employ suitably trained staff to manage technology infrastructure and provide IT support services.

GOAL 4

Provide relevant, high quality training opportunities in a variety of formats to member libraries and SLS staff.

OBJECTIVES:
- Continue holding PD Day every two years.
- Provide guest speakers and training at member library meetings.
- Share relevant external training and learning opportunities in a timely manner.
- Allocate operating budget funds to pay for training opportunities.
- Employ suitably qualified staff to provide training opportunities.

GOAL 1

Ensure regular, meaningful communication between SLS staff and board, member library staff & boards, municipalities, contracted partners and stakeholders.

OBJECTIVES:
- Continue publication of quarterly newsletter.
- Provide regular email updates.
- Share Board meeting minutes via email, once approved.

GOAL 5

Provide support for member library advocacy efforts.

OBJECTIVES:
- Continue to allocate system financial resources.
- Offer training opportunities on advocacy & marketing.
- Ensure suitably trained staff are available to assist member libraries.
- Collaborate with design professionals in the creation of advocacy materials.

The Goals & Objectives identified in this Plan of Service are the result of an in-person needs assessment session conducted on June 15th, 2016.

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Shortgrass Library System History

It took a while, but it happened: while the earliest discussions about creating a library system for southeastern Alberta took place as far back as 1977, it was not until 1988 that Shortgrass Library System was confirmed as Alberta's fifth regional library system.

The ball really started rolling in 1981 at the Alberta Library Conference, when staff and trustees from various libraries in the area met to discuss the potential for a regional system. As a result of this initial meeting, an organizational meeting was held in Redcliff in June 1981. The group applied to the Alberta Library Trustees Association for financial assistance, and received $5000 of seed money. A further two meetings, attended by representatives from Brooks, Bassano, and Burdett. A further three meetings were held in 1982, this time also attended by representatives from Duchess; at the final meeting in 1982, the system's boundaries were established and the name "Shortgrass" was confirmed. In 1983, the Committee was restructured to allow for both improved communication and representation from boards and from councils that did not have boards. That year, the committee also obtained letters of support from boards and councils representing 89% of the local population, and applied for a $5000 grant from Alberta Culture.

The hard work continued in the following few years, as the committee continued to establish itself and create connections with supporting libraries. A logo (still in use to this day) was approved, and the executive agreed that a proposal for service be prepared and promoted to all boards and councils by early 1986. In March 1988, the province announced that Shortgrass Library System would be Alberta's fifth regional library system.

Things started progressing quickly. Colleen Swift was hired as the system's first Director in 1988, and municipalities were invited to bid on the location for SLS headquarters. After some discussion, Medicine Hat was chosen, and the search for a suitable location began. Ground was broken on the present-day HQ site in September 1989. The first book was also ordered, catalogued, processed, and delivered by Shortgrass that year.

Over the years, Shortgrass continued to grow, gradually adding the provision of delivery and cataloguing services for area school districts and increasing the number of member libraries, including the (then) Village of Tilley in 2005, the Village of Duchess in 2011, the Irvine library in 2015, and the Gem library in 2016. With the addition of the Gem library in 2016, all libraries located within Shortgrass' geographic area are now fully participating members.

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Important Annual Events:

*please see Appendix A, the annual Calendar of Meetings, for actual dates.

January:
- First Library Managers meeting of the year
- Calendar of meetings for the year is distributed by Shortgrass
- The Manager, Systems and Technical Services shares data and annual statistics for the previous calendar year with member libraries. This data must be entered into the
- Complete and submit the survey for the PLSB Survey and Annual Report. Due Date: February 28th.
- Invoices for materials allotment are sent out to library boards.
- Invoices for operational levies are sent out to municipalities.

February:
- Feb 28th: Survey & Annual Report for provincial grant funding from Public Library Services Branch (the same one sent to you in January) is due. For more information, please see: http://www.municipalaffairs.alberta.ca/plsb_survey_and_annual_report.cfm
- Libraries are asked to indicate whether they are participating in the TD Summer Reading Club

March:
- Library Managers meeting
- Summer Reading Program Planning - Parades.
  - Please inform Shortgrass about parades happening in your community this summer if you would like to arrange our participation
- Southern Alberta Library Conference (SALC) in Lethbridge
- Libraries are asked to select their preferred date (in July or August) for the summer reading concert tour, which will be organized and funded by Shortgrass

April:
- Alberta Library Conference in Jasper

May:
- Library Managers meeting

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June:
- Middle of June: joint meeting with Shortgrass Library Board, Library Managers and Library Board Chairs.

July & August:
- Summer Reading Program takes place
- Summer Reading concert tour of member libraries by a children's performer

September:
- Library Managers meeting
- Submit summer reading statistics to Client Services Librarian

November:
- Library Managers meeting
- Late November - Order cut-off date

December:
- Annual Christmas Dinner & Social
- Shortgrass office Christmas closure: 12 p.m. on December 24 to January 1

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Shortgrass services offered to member libraries:

The following is a brief overview of Shortgrass services offered to member libraries. Further information about these services can be found in other sections of this manual.

Bibliographic Services & Acquisitions:
The Shortgrass Library System provides an annual per capita allotment to member libraries which is to be used for the purchase of library materials. The rate for the per capita allotment is reviewed and set by the Shortgrass Library System on an annual basis and takes into consideration materials pricing trends provided by major vendors, as well as other factors.

Member libraries are responsible for the selection of materials for their collections. Shortgrass staff members are responsible for placing the orders, and cataloging and processing the materials before shipping them to the owning libraries.

OverDrive Collection Development

Shortgrass Library staff purchase eBooks and eAudiobooks for the LibraryToGo collection based on the amount of money allocated to the OverDrive system-wide eBook collection development. Library Managers vote on the amount allocated for these purchases each year. The OverDrive purchases are done on a weekly schedule and are based on the list of the most popular titles in the Amazon Kindle and Kobo catalogues.

Only eBooks are purchased with the Overdrive allotment; member libraries are encouraged to buy eAudiobooks based on their local demand. eBook and eAudiobook titles bought by an individual library or based on an individual library requests are paid for out of the library's own materials budget.

Shortgrass is also responsible for loading the catalogue records for all new titles purchased for the LibraryToGo collection and ensuring the optimal display of the OverDrive titles in the online catalogue.

Consulting by Professional Librarians:

To achieve excellence in library service, support is offered to local boards, staff, and volunteers including:
- Onsite and remote support, training workshops,and seminars
- Plan of service and policy development facilitation
- Library programming support

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- ○ Programming kits
- ○ Library advocacy & marketing assistance
- ○ Summer Reading Program support
- ○ Assistance with collection development and space planning

Technology:
- ● Symphony Integrated Library System (ILS)
- ● Bibliocommons - an easy to use, public-facing tool for catalogue searching, including mobile access via apps and mobile web
- ● Computer and Information Technology support services
- ● Library Website development and maintenance

Other Benefits:
- ● Access to a breadth of eResources and digital content
- ● Intra-system van delivery service
- ● Resource sharing at a provincial and national scale
- ● Reference services

Resource sharing and Interlibrary loan services

- ● A shared online catalogue and software allows libraries to manage patron records, circulate items, and more
- ● Interlibrary loan of requested titles from libraries across Alberta and Canada
- ● Ability to borrow items/access services with a Shortgrass library card from 14 public libraries
- ● Reciprocal borrowing with Medicine Hat College Library

Computer and information technology support services

Shortgrass manages computer and network resources throughout the region, providing:
- ● SuperNet, Internet, and wireless services
- ● Computer and network support via remote desktop, on-site visits, and emergency after-hours support
- ● Email and Library website development and hosting
- ● Computer purchasing and network-related hardware and software for libraries
- ● Configure system wide searching via Bibliocommons - an Online Public Access Catalog (OPAC), including mobile access via apps and mobile web

Please see Appendix B, Policy F.10 (Technology Software/Equipment Support -- Service and Financial Support) for full details of Shortgrass' computer and network management commitments.

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Disc cleaning and repair services

Shortgrass offers a disc repair service to its member libraries. This service is provided through a Disc Cleaner that can repair most scratches on 12 cm disks including Music CDs, Books on CD, DVDs and CD-ROMs, Video game discs and Blu-Ray discs. Please fill out the Disc Repair Form for each disc you send in to be "cleaned".

The disc cleaning/repair service is also available to the public at a cost of $1/disc for library card holders and $2/disk for those who do not have a library card. Patrons can send discs they wish to be cleaned/repaired through their local library.

Library 2 You

Library 2 U is a free mail service delivering print and audiovisual material to patrons facing physical and geographic barriers to accessing their local library. This service is offered in partnership with Marigold Library System. More information can be found in the Services for Homebound Patrons section of this manual.

Meeting Room Rentals

Shortgrass has two boardrooms available for use by SLS member municipalities and member library boards/staff. Both rooms are equipped with a projector and screen. Washroom access is available.

The Shortgrass Library System Board of Trustees views its two boardrooms as a valuable regional community resource. The Board's Bylaw states that the boardrooms are available for use by member libraries at no charge during business hours. Coffee service is available at an additional fee.

For meeting room bookings, please contact the Executive Assistant.

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APPENDIX A

**Shortgrass Library System** **2019 CALENDAR OF MEETINGS**
Date	**Meeting**
January 2	1st day SLS office open in 2019
January 14	Library Managers meeting
January 16	**SLS Board Meeting**
February 13	**SLS Board Meeting**
February 18	Family Day – SLS Office Closed
March 18	Library Managers meeting
March 20	**SLS Board Meeting**
April 17	**SLS Board Meeting**
April 19	Good Friday – SLS Office closed
April 22	Easter Monday – SLS Office closed
May 13	Library Managers meeting
May 15	**SLS Board Meeting**
May 20	Victoria Day - SLS Office Closed
June 19	**Board Meeting** w/ Lib Board Chairs & Library Managers
July 1	Canada Day – SLS Office Closed
August 5	Heritage Day - SLS Office Closed
August 21	**SLS Board Meeting**
September 2	Labour Day - SLS Office Closed
September 16	Library Managers meeting (location TBD)
September 18	**SLS Board Meeting (location TBD)**
October 14	Thanksgiving – SLS Office Closed
October 16	**SLS Board Meeting**
October 21	PD Day
November 11	Remembrance Day – SLS Office Closed
November 18	Library Managers meeting
November 20	**SLS Board meeting**
November 22	**Order cut-off**
December 11	Christmas Dinner & Social (Medicine Hat Golf & Country Club)
December 24	Christmas Eve - SLS Office Closed at noon until January 2nd.
January 2, 2020	SLS Office reopens
*Last Updated: August 8th, 2019 pm*

APPENDIX B

SHORTGRASS LIBRARY SYSTEM POLICY MANUAL

Section F: Finance

Policy F.10: Technology Software/Equipment Support – Service & Financial Support

Updated and Approved: February 19, 2014
Updated and Approved: May 17, 2017

Background

The Shortgrass Library System and its member libraries share in the <u>service support</u> of the telecommunications system and the Integrated Library System (ILS) software and equipment. This policy and accompanying guidelines detail the responsibilities of SLS and the individual libraries as well as details about the cost sharing arrangements.

Policy

The Shortgrass Library System will ensure that each member library receives full maintenance support to enable public access to the SLS Online Resources. SLS will also ensure library staff have relevant access to the ILS client software to enable them to perform their duties.

The telecommunications costs relating to the public access, circulation, and communication functions plus the maintenance of the ILS are shared by Shortgrass Library System and the libraries on a 50/50 basis.

Guidelines – Service Support

These guidelines outline the service support expectations for technology equipment used by SLS and its member libraries.

A.   Supporting Computer Equipment and Setup at Shortgrass Member Libraries

1.   Libraries may purchase additional equipment. SLS strongly encourages libraries to purchase equipment that matches specifications and standards provided by SLS. SLS will not support any hardware, software, printers, or network devices if libraries purchase equipment not meeting those standards.

2.   When libraries purchase their own computer equipment, they should use consistent computer suppliers who can supply long term hardware support. A consistent operating system version should also be acquired to ease support and troubleshooting.

3.   If outside funding sources become available, SLS may provide assistance in purchasing additional equipment.

4.   Each library is expected to provide a protected environment for technology equipment.

B.   <u>Shortgrass Library System Responsibilities</u>

1.   <u>Hardware Purchase</u>

- Provide hardware specifications to libraries when they are planning purchases of technology equipment
- Provide operating system specifications for staff and public technology equipment
- May purchase additional hardware on behalf of member libraries if funds become available.

2.   <u>Hardware Support</u>

SLS Staff will provide hardware support for the following:
- Circulation and Public Access technology equipment, including Wi-Fi.
- Network equipment (router, hub, phone connections) for CIRC/PAC connections
- Older PCs supplied by SLS that function as PAC.
- System Printers
- Other support for technology hardware maintenance, repairs and installation support may be offered if time and resources permit.

3.   <u>Software Support</u>

SLS Staff will provide software support for the following:

- ILS software maintenance is provided by SLS.

4.   <u>Network Support</u>

SLS Staff will provide network support for the following:

- Support for technology equipment obtained by direct library purchases or grant purchases is limited to solving software and hardware problems to maintain existing network connectivity
- SLS Staff will monitor the network to ensure network health.

5.   <u>Internet Connectivity</u>

SLS Staff will provide support to ensure internet connectivity as follows:

- Assist with the technology setup involved with firewall and hub setup as well as the network settings on technology equipment.

- Internet connectivity charges are shared by SLS and member libraries.
- Monitor network usage and allocate bandwidth to optimally suit local needs

C. **Member Libraries Responsibilities**

1. Member libraries are strongly encouraged to train their staff to support and maintain all technology equipment housed in their library.

2. Hardware Purchase

    - Libraries are responsible for purchasing their own technology hardware. However, SLS has the following recommendations:

        - SLS strongly encourages libraries to purchase equipment that matches specifications and standards provided by SLS.

3. Hardware Support

    SLS Member libraries are responsible for supporting any hardware not mentioned in Section B. 2 of this policy.

    - Libraries should work with the original supplier of any equipment not supported by SLS.
    - For any equipment not supported by SLS, staff will assist member libraries in finding appropriate help.

4. Software Support

    SLS Member libraries are responsible for supporting any software not mentioned in Section B. 3 of this policy.

    - Library purchased software is the responsibility of the library
    - SLS Staff provide training in the use of ILS software.
    - For any software not supported by SLS, staff will assist member libraries in finding appropriate help.

5. Network Support

    SLS Member libraries are responsible for supporting any network issues not mentioned in Section B. 4 of this policy.

    - Network cabling within the library is the responsibility of the library
    - Libraries should follow general equipment guidelines provided by SLS Staff when dealing with network equipment.

6.   <u>Internet Support</u>

- Libraries may be required to purchase a firewall device or a hub if an additional internet feed is purchased for the library (the Library is expected to contact SLS and allow SLS to participate in the equipment setup)
- SLS will only support technology equipment that has been approved by SLS Staff

Guidelines – Cost Sharing

The calculations for cost sharing are conducted as per Appendix A to this policy.

1. **Telecommunications - Cost Sharing Formula**

- The telecommunications annual cost will be reduced by the amount charged to contracts before the 50/50 cost sharing formula is applied (SLS 50% and Member libraries 50%)
- Billing dates for the period of January to June will be July 15th and for the period of July to December will be December 15th.

2. **ILS Maintenance - Cost Sharing Formula**

- The ILS maintenance annual cost will be reduced by the amount charged to contracts before the 50/50 cost sharing formula is applied (SLS 50% and Member libraries 50%)
- SLS will bill the libraries July 1st for annual ILS maintenance.
- As per the Shortgrass agreement, the population figures most recently published by Alberta Municipal Affairs will be used to calculate per capita costs.

POLICY F10 APPENDIX A

2. SLS -- % Breakdown for Member Libraries 3. Use when Preparing Sales Invoices for Member Libraries base on share 4. Last Updated: March 27, 2018 based on 2017 Official Population Count			Percentage Doubled
Alcoma Library Population: 691	Division #4 (Population 691 – 100%) = 0.32%	Total: 0.32%	**0.64%**
Bassano Library Population: 1,752	Bassano (Population 1,206 – 100%) = 0.56% Division #6 (Population 546 – 100%) = 0.25%	Total: 0.81%	**1.63%**
Bow Island Library Population: 3,833.50	Bow Island (Population 2,043 – 100%) = 0.95% C of 40 Mile (Population 50% of 3,581 – 1,790.50) = 0.83%	Total: 1.79%	**3.57%**
Brooks Library Population: 16,835	Brooks (Population 14,451 – 100%) = 6.73% Division #5 (Population 1,324—100%) = 0.62% Division #10 (Population 1,060 – 100%) = 0.49%	Total: 7.84%	**15.68%**
Duchess Library Population: 2,461	Duchess (Population 1,085 – 100%) = 0.51% Division #3 (Population 547 – 100%) = 0.25% Division #8 (Population 829 – 100%) = 0.39%	Total: 1.15%	**2.29%**
Foremost Library Population: 2,331.50	Foremost (Population 541 – 100%) = 0.25% C of 40 Mile (Population 50% of 3,581 – 1,790.50) = 0.83%	Total: 1.09%	**2.17%**
Gem Library Population: 568	Division #9 (Population 568 – 100%) = 0.26%	Total: 0.26%	**0.53%**
Graham (Ralston) Library Population: 2,735.39	Cypress County (Pop. share – 26% of 6,657.98 – 1,731.07) = 0.81% CFB Suffield (Pop. share – 1,004.02) = 0.47%	Total: 1.27%	**2.55%**
Irvine Library Population: 1,464.76	Cypress County (Pop. share – 22% of 6,657.98 – 1,464.76) = 0.68%	Total: 0.68%	**1.36%**
Medicine Hat Library Population: 66,122.93	Medicine Hat (Population 63,260 – 100%) = 29.46% Cypress County (Pop. share – 43% of 6,657.98 – 2,862.93) = 1.33%	Total: 30.8%	**61.60%**
Redcliff Library Population: 6,199.22	Redcliff (Population 5,600 – 100%) = 2.61% Cypress County (Pop. share – 9% of 6,657.98 – 599.22) = .28%	Total: 2.89%	**5.77%**
Rolling Hills Library Population: 577	Division #1 (Population 577 – 100%) = 0.27%	Total: 0.27%	**0.54%**
Rosemary Library Population: 758	Rosemary (Population 396 – 100%) = 0.18% Division #7 (Population 362 – 100%) = 0.17%	Total: 0.35%	**0.71%**
Tilley Library Population: 1,020	Division #2 (Population 1,020 – 100%) = 0.48%	Total: 0.48%	**0.95%**
Total Population: 107,349	50% Mem Lib + 50% SLS = 100%	**Total 50% for member libraries**	**100%**

*Rounded to 2 decimal places

Shortgrass Library System Library Contacts and Hours

Headquarters Staff

Petra Mauerhoff, CEO
petra@shortgrass.ca
Phone: 403-529-0550, ext. 101
Contact for:
- Administrative & board matters
- System membership
- Levies - Municipal & Materials
- Shortgrass Services
- Suggestions/Concerns
- Contracts

Chris Field, Manager, Systems and Technical Services
chris@shortgrass.ca
Phone: 403-529-0550, ext 102
Contact for:
- Oversight of Technology, Cataloguing, Processing, & ILL Services
- ILS/Discovery Layer Administration, Support, & Training
- E-Resource Licensing & Support
- Statistics & Reports

Aaron Dalla-Longa, Systems Administrator
aaron@shortgrass.ca
Phone: 403-529-0550, ext. 103
Contact for:
- Network Administration & Support
- Website Administration & Support
- Hardware Recommendations, Support, and Disposal

Samantha West, Client Services Librarian
samantha@shortgrass.ca
Phone: 403-529-0550, ext. 104
Contact for:
- Summer Reading Program
- Programming Kits
- Weeding & Inventory Help
- E-Resources Workshops
- Interlibrary Loans

Stacey Pahl, Executive Assistant
stacey@shortgrass.ca
Phone: 403-529-0550, ext. 100
Contact for:
- Delivery and Schedule
- Summer Reading Program
- Board Minutes
- Accounts Receivable/payable
- Invoice/Statement Questions
- Reception
- Calendar Administration
- Contact Information Updates

Keltie Turner, Acquisitions Officer
keltie@shortgrass.ca
Phone: 403-529-0550, ext. 106
Contact for:
- Order Requests and Cancellations
- Interlibrary Loans

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Val Ogden, Cataloguing

val@shortgrass.ca

Phone: 403-529-0550, ext. 111

Contact for:
- Cataloguing

Blaine Heglund, Cataloguing

blaine@shortgrass.ca

Phone: 403-529-0550, ext 114

Contact for:
- Cataloguing
- Interlibrary loans

Liz Alexander, Technical Services Assistant

liz@shortgrass.ca

Contact for:
- A/V Cataloguing
- CVS Orders
- Overdrive Orders

Shelley Grisonich, Processing

shelley@shortgrass.ca

Phone: 403-529-0550, ext 112

Contact for:
- Processing
- Disc Cleaning

Larry Dye, Rod Thurlow, Chris Massini, Drivers

drivers@shortgrass.ca

Phone: 403-529-0550, ext. 107

After Hours Emergency Support

Phone: 403-529-0550, ext. 109

***Only call this number if a problem is encountered that prevents the library from carrying out critical functions

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Member Libraries

Alcoma Community Library Manager: Janet Wagner School phone: 403-362-3741 Summertime: 403-362-8897 Email: alcomacommunitylibrary@shortgrass.ca Deliveries: Monday	**Regular Hours:** *Mon-Weds, Fri:* 10:00am - 3:00pm *Thurs:* 10:00am - 3:00pm AND 6:30pm - 8:00pm Closed all statutory holidays.
Bassano Memorial Library Manager: Bonnie Bennett Phone/Fax: 403-641-4065 Email: bassanomemoriallibrary@shortgrass.ca Deliveries: Thursday	**Regular Hours:** *Tues:* 10:00 am - 8:00 pm *Thurs:* 2:00 pm - 9:00 pm *Sat:* 10:00 am - 5:00 pm Closed all statutory holidays.
Brooks Public Library Manager: Lisa Patton Phone: 403-362-2947 Fax: 403-362-8111 Email: brookspubliclibrary@shortgrass.ca Deliveries: Monday & Thursday	**Regular Hours:** *Mon:* 9:30am - 5:00pm *Tues, Weds, Thurs:* 9:30am - 8:00pm *Fri & Sat:* 9:30am - 5:00 pm *Sun:* 1:00pm - 5:00pm Closed all statutory holidays.

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Duchess & District Public Library Manager: Daryl Kimura Phone/Fax: 403-378-4369 Email: duchesspubliclibrary@shortgrass.ca Deliveries: Thursday	**Regular Hours:** *Tues & Thurs* 10:00 am - 4:00 pm *Wed* 3:00 pm - 8:00 pm *Fri* 1:00 pm - 5:00 pm *Sat:* 10am - 1pm Closed all statutory holidays.
Foremost Municipal Library Manager: Joan Beutler Phone: 403-867-3855 Fax: 403-867-3856 Email: foremostmunicipallibrary@shortgrass.ca Deliveries: Tuesday	**Regular Hours:** *Tues & Wed* 10:30 am - 5:30 pm *Thurs* 10:30 am - 6:30 pm *Fri* 10:30 am - 4:30 pm Closed all statutory holidays.
Gem Jubilee Library Manager: Kim Biette Phone 403-641-3245 (located in fire hall building) Home Phone 403-641-2292 Email: gemlib@shortgrass.ca Deliveries: Thursday	**Regular Hours:** *Mon:* 10:00 am - 12:00 pm *Weds:* 7:00 pm - 9:00 pm *Fri:* 2:00 pm - 4:00 pm Closed all statutory holidays.

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Graham Community Library (Ralston) Manager: Stefanie Schranz Phone: 403-544-3670 Fax: 403-544-3814 Email: grahamcommunitylibrary@shortgrass.ca Deliveries: Monday & Thursday	**Regular Hours:** *Mon & Wed* 10:00 am - 6:00 pm *Tues & Thurs* 9:00 am - 4:00 pm *Fri* 9:00 am - 5:00 pm Closed all statutory holidays.
Irvine Library Association Manager: Joan Cote Email: joanc@shortgrass.ca Deliveries: Wednesday	**Regular Hours:** *Mon, Tues, Weds:* 3:30 pm - 8:30 pm *Thurs* 10:00 am - 2:00 pm Closed all statutory holidays.

Medicine Hat Public Library
Chief Librarian: Ken Feser
Phone 403-502-8528
Email kenf@shortgrass.ca
 	
Carol Ann Cross-Roen, Head of Children's Services
Phone 403-502-8532
Email CarolAnnC@shortgrass.ca
 	
Keith Walker, Head of Fiction Services
Phone 403-502-8533
Email keith@shortgrass.ca
 	
Sharlene Hertz, Office Manager
Phone 403-502-8527
Email sharleneh@shortgrass.ca
 	
Annette Ziegler, Manager of Circulation Services
Phone 403-502-8539
	Regular Hours:
	Mon - Thurs
	10:00 am - 9:00 pm
	Fri & Sat
	10:00 am - 5:30 pm
	Sun
	1:00 pm - 5:30 pm
	
	Adult Services Information
	      Phone 403-502-8525
	
	Children's Services
	      Phone 403-502-8526
	
	Reference Services
	      Phone 403-502-8538
	
	MHPL Fax 403-502-8529

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Email annette@shortgrass.ca Deliveries: Monday to Friday	**MHPL Interlibrary Loan** Email illams@shortgrass .ca Email marbal@medicinehat.ca
Redcliff Public Library Library Manager: Tracy Weinrauch Phone: 403-548-3335 Fax: 403-548-6295 Email: redcliffpubliclibrary@shortgrass.ca Deliveries: Monday & Thursday	**Regular Hours:** *Mon - Thurs* 10:00 am - 8:00 pm *Fri & Sat* 10:00 am - 5:00 pm *Sun* 1:00 pm - 4:00 pm Closed all statutory holidays.
Rolling Hills Public Library Library Manager: Johnene Amulung Public Library Phone: 403-964-2186 School Phone: 403-964-3640 H Summertime: 403-964-2292 Email: rollinghillspubliclibrary@shortgrass.ca Deliveries: Monday	**Regular Hours:** *Mon* 7:00 pm - 9:00 pm *Weds:* 9:00 am - 12:00 pm; 1:30 pm - 3:30 pm; 7:00 pm - 9:00 pm Closed all statutory holidays.
Rosemary Community Library Library Manager: Vanessa Plett School Phone: 403-378-4493, ext 150 School Fax: 403-378-4388 Email: rosemarycommunitylibrary@shortgrass.ca Deliveries: Thursday	**Regular Hours:** *Mon, Wed & Fri* 1:00 pm - 3:30 pm *Tues & Thurs* 11:00 am - 8:00 pm Closed all statutory holidays.

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Susan Andersen Municipal Library (Bow Island) Library Manager: Kathryn Van Dorp Phone: 403-545-2828 Fax: 403-545-6642 Email: bowislandmunicipallibrary@shortgrass.ca Deliveries: Tuesday & Friday	**Regular Hours:** *Tues & Wed* 10:00 am - 8:00 pm *Thurs & Fri* 10:00 am - 5:00 pm *Sat:* 10:00 am -1:00 pm Closed all statutory holidays.
Tilley & District Public Library Library Manager: Anita Chappell School Phone: 403-377- 2233, ext 150 Fax: 403-377- 2097 Email: tilleypubliclibrary@shortgrass.ca Deliveries: Monday	**Regular Hours:** *Mon* 7:00 pm - 9:00 pm *Wed* 9:00 am - 11:00 am 7:00 pm - 9:00 pm *Sat* 10:00 am - 12:00 pm Closed all statutory holidays.

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Weeding

While it is important to ensure that you are regularly adding new materials to your library collection, it is equally important to ensure that you are regularly removing those that no longer add value to the collection. This process is known as *weeding*.

Put simply, weeding is the systematic removal of resources from a library based on certain criteria, such as the condition of the book, accuracy of information, and circulation/usage statistics. Different libraries may have different criteria for weeding, depending on the information needs of patrons, the size of their collection, or their ongoing goals for the collection (e.g., wishing to increase the number of children's books available). You will be responsible for deciding what your weeding goals are and putting them into practise.

How to Weed

The most commonly-referred to method for this element of collection management is the **CREW method**, which stands for Continuous Review, Evaluation, and Weeding.

Essentially, following CREW ensures that weeding is not a one-time-only event, but an ongoing process. This does not mean you should be pulling every book in your collection off the shelves every month to make sure it is "still good"; rather, it is good practise to regularly choose sections of your library for evaluation. Doing a shelf here or there will help keep the process minimally stressful and cause the least amount of disruption to both you and your patrons.

When you are weeding, you should choose -- and stick to -- a specific set of criteria to help you decide whether an item should be kept in your collection or discarded. According to CREW, some general criteria for determining whether an item still has a place in the collection include:

- **Publication date**: This matters more for informational works concerning science, health, finances, or travel (topics where information can quickly become outdated and incorrect) than it does for works of fiction, poetry, hobby guides, or self-help materials.
- **Author:** If it is a work by a well-known/well-regarded author, this could be cause for keeping it. That said, you probably don't need to keep a copy of every book James Patterson has ever published; these items are generally widely available and can be acquired from elsewhere, if necessary.
- **Publisher**
- Physical condition: is the book in poor condition? Can it be refreshed/repaired?
- Availability of additional copies: Do you have more than one copy of this book in circulation? Do other libraries in system have copies as well?
- Circulation rates: is the item borrowed with some regularity, or does it spend most of its life on the shelf?

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- Relevance to the community
- Availability of other resources

A commonly used acronym for guiding the weeding process is MUSTIE:

M - Misleading. The information contained in the item is inaccurate or out of date. Financial guides, books on medical conditions, and old travel guidebooks all contain information that grows outdated very quickly, and should be regularly replaced with the most current, accurate information available.

U - Ugly. The material is worn, tattered, or mildewed. If you don't want to touch it, is anyone else going to want to either?

S - Superseded. The material has been replaced by a newer edition, newer format, or newer title.

T - Trivial. The material is not well-written or researched, and adds little to the general conversation.This is often the case with materials that are published immediately after major news events (for instance, books published in the wakes of elections or massive scandals).

I - Irrelevant. The material does not meet the needs of the library's community of users. Something that might be highly useful in one place (e.g. a guide to cattle breeding in a farming community) might be of little or no value in a different place. Even the newest, shiniest item will languish on the shelf if it is of no interest to anyone in the community.

E - Available Elsewhere. The same information can be found in another item in your collection. This also applies if multiple copies of the same title can be found at other Shortgrass libraries, or if the item is readily available via interlibrary loan.

For a full guide to the CREW Method for weeding, please review the PDF of *CREW: A Weeding Manual for Modern Libraries*, included in the Procedures section of this manual.

What Not to Weed

As difficult as it can be to decide what to remove from your collection, it can sometimes seem harder to decide what to keep. While your guidelines for this will shift depending on various criteria, there are some things that should be kept in the collection as long as they can be maintained, regardless of age or condition.

Local History. Items in this category include materials such as community histories, historical newspapers, and genealogical records. Of high interest to the local community, genealogical

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researchers, and historians, they are also often either unique or only one of a few copies in existence.

Local Authors/Local Settings. Items by local authors or set locally will generally be of high interest to the community and are often kept as a matter of local pride, even if they are low-circulating items. If nothing else, you do not want to be the person who discards the mayor's wife's proudly self-published novel…

Gifts/Memorials. This is a more difficult category to navigate, as mishandling the removal of these items from the collection could cause upset or grief from the donor or memorialized person's family if the removal is noticed. A potential solution, if the book is to be weeded: contact the donor (or memorialized person's family) and offer it to them as a memento, telling them that the item has been "loved to death". Offer them the opportunity to choose a new item in the collection as a memorial. These steps will potentially save a significant amount of awkwardness and hurt.

What To Do With Weeded Materials

Upon completion of a weeding project, you may have a large amount of items that need to be removed from your library collection. Please first ensure that these items have been correctly discarded in Workflows (refer to page 16 of the procedures manual for information on how to do this.)

When discarded items have been removed from the catalogue, you must then decide what to do with them. First: do not be afraid to simply recycle those that are in too poor condition to be used any longer. If *you* think an item is too gross to touch, your patrons definitely do too.

Having a library book sale is an excellent option for removing old books from your library -- and as a bonus, you will be able to raise money! If you have adequate storage space, you may wish to save your discards until you can have a large sale -- many libraries have annual or semiannual book sales. If you do not have room to story many boxes of books, you may also wish to have a sale shelf or table in your library space. This is a great option for selling books as you weed them, as your shelf can continually be replenished. In all cases, you can set a price -- generally between $0.25-$1.00 per item -- or accept donations.

Any items that do not sell may also be recycled.

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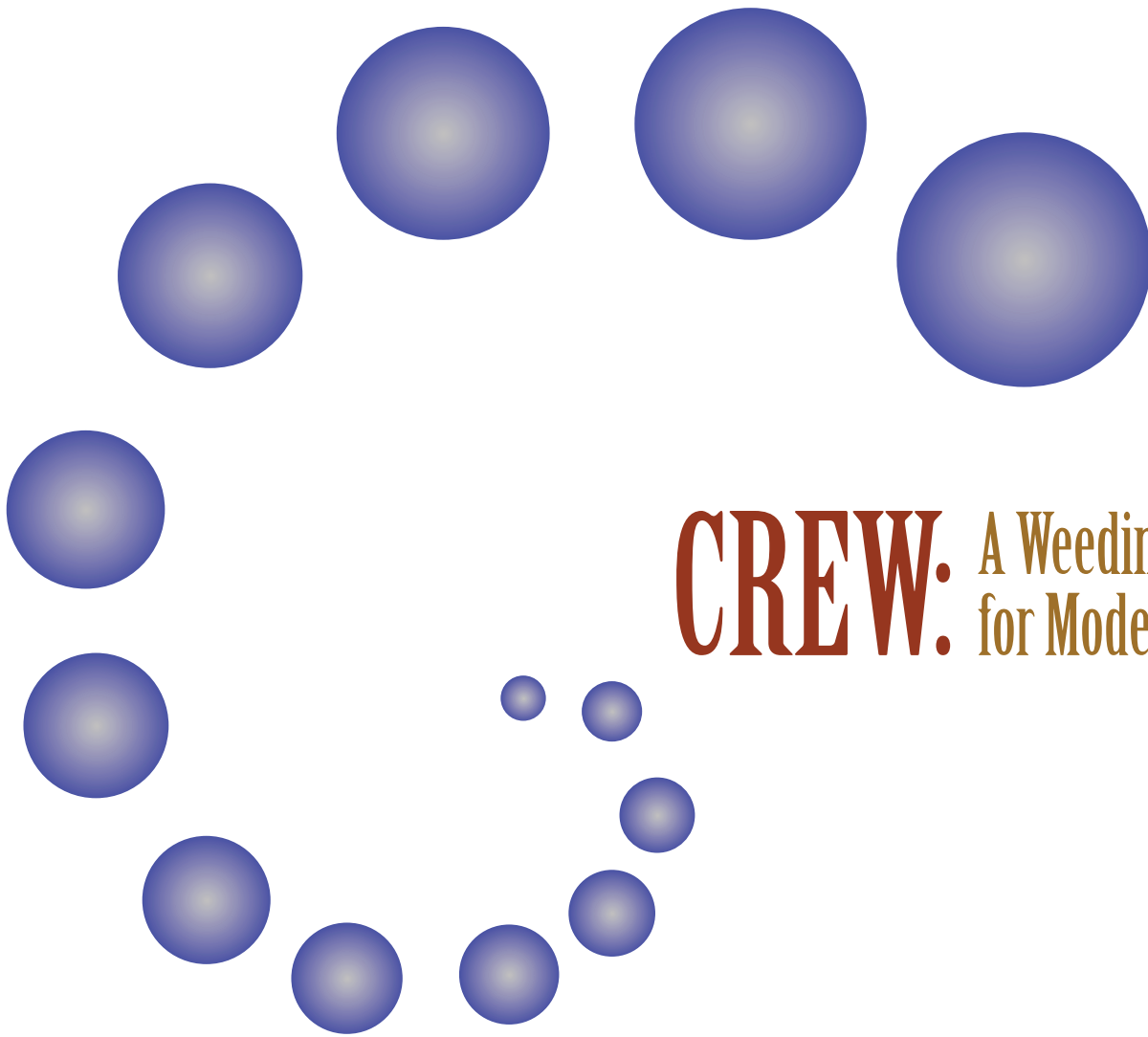
CREW: A Weeding Manual for Modern Libraries

Revised and Updated by:

Jeanette Larson

Texas State Library and Archives Commission
Austin, Texas — 2008

Texas
State Library
and Archives
Commission

Table of Contents

"I know no rules for discarding that eliminate possibility of error. We all make mistakes but most of these mistakes I am convinced stand on the shelves."

Gladys Allison, *Suggestions on Discarding* (December 1938)

"...Weeding out requires more knowledge, forethought and power of discrimination than is ordinarily brought to bear in the selection of books."

Thomas Aldred, *Book Selection and Rejection* (March 1901)

"Next to emptying the outdoor bookdrop on cold and snowy days, weeding is the most undesirable job in the library. It is also one of the most important."

Will Manley, "The Manley Arts," *Booklist* (March 1, 1996)

"A good library collection is like a good haircut. It's not what you cut—it's what you leave."

Anne Felix, Grand Prairie (Texas) Public Library System

Introduction

For more than 30 years, *The CREW Method* has provided guidance to librarians and staff in small and medium sized public libraries about how to cull outdated and no longer useful materials from their collections. Since its inception in 1976, *The CREW Method* has become the benchmark tool for weeding library collections. It has been more than a decade since the first revised edition brought technology and online catalogs into the process. This new edition, called *CREW: A Weeding Manual for Modern Libraries*, builds on the work of Joseph P. Segal and Belinda Boon. Although much of the basic information remains the same, the impact of changes in technology and its effect on library collections has been taken into consideration. The CREW guidelines by Dewey Class have been expanded even further and updated to reflect current practices. New sections have been added that explain in more detail the MUSTIE factors and types of disposal. The bibliography has been updated to include current editions of standard works, contemporary selections, and expanded online resources.

Although it is written primarily with the needs of small and medium sized public libraries in mind, it has proven to be useful to libraries of all types and sizes. Since the release of the first revised edition in 1995, we have seen many changes in library operations. Almost universal access to the Internet has affected every aspect of library public service by providing instantaneous access to information sources heretofore unknown. Many standard reference tools and nonfiction works that were available only in print form ten years ago are now available in electronic formats, either through free or fee-based subscription services. *CREW: A Weeding Manual for Modern Libraries* takes this into consideration, as well as changes in selection and withdrawal practices in specific areas such as reference and nonfiction materials.

As with the previous editions, this manual is designed for use primarily by librarians and staff in smaller community libraries and branches of larger systems. We know that the CREW method is used by librarians in many other states and we beg your indulgence when the manual refers to Texas-specific resources and statewide projects.

While no librarian has enough time, space, or budget to ignore the need to weed, *CREW: A Weeding Manual for Modern Libraries* strives to make the process easier for staff that may have the most difficulty finding ways to keep the collection current and vital. The justification for weeding—to maintain a collection that is vital, relevant, and useful—and the criteria for weeding a library—physical condition, relevance of the subject, currency of the information—remain basically unchanged. However, libraries are experiencing increasing scrutiny from the public and funding sources, and may be required to justify their discard practices in more detail. Access to online library catalogs and direct requests for interlibrary loan may cause some librarians to hold on even more tightly to materials that should be discarded because 'someone' may request the item. The current edition addresses these concerns and incorporates suggestions offered by practicing librarians in public, academic, and school libraries during workshops conducted by the author and from various

discussion lists. The support and input of these librarians—you know who you are— is greatly appreciated and has served to make *CREW: A Weeding Manual for Modern Libraries* an even richer resource for librarians around the world.

Although it has become easier in many ways for staff in small community libraries to obtain continuing education and training through workshops brought to their area by the Texas State Library & Archives Commission and regional systems, more training is available online and through alternative venues. However, new staff and volunteers are continually entering the profession and there is an ongoing need for information on how to effectively weed the collection. Staff and volunteers also must understand why and how materials that have passed their useful life are removed from the collection. They also should be able to articulate that understanding to others in the community who may view discarding of books as tantamount to 'book burning' or wasting tax dollars.

CREW: A Weeding Manual for Modern Libraries attempts to describe clearly, practically, and in a step-by-step fashion a now tried-and-true method of carrying out the five processes of 'reverse selection:' inventory, collection evaluation, collection maintenance, weeding, and discarding. Keep in mind that no single process will serve the needs of all libraries. *CREW: A Weeding Manual for Modern Libraries* offers guidelines, and attempts to explain the reasons behind the guidelines, but every library should consider the needs of their particular community and adjust the guidelines accordingly. For example, if budgets are quite tight and expected to be tight for many years, it may be necessary to lengthen the age factors a bit in favor of removing only books that are in poor condition. CREW continues to caution, however, that lack of funds to replace outdated or worn items is *never* an excuse for not weeding. Any extensive weeding will enhance the value of the collection so librarians are urged to **use professional judgment at all times**. I also welcome questions and feedback about situations that may not appear to be served by CREW and your best practices.

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Acknowledgements

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I also wish to extend my sincerest thanks and appreciation to everyone who played a part in the revision process and especially to:

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Before We Start the Process

Library work is an intricate mix of programs, services, and materials. It is important to recognize that weeding is but one part of the collection development process, which in turn is a part of the totality of work that we do to make the library an important part of the community. The library's collection is the most tangible part of any library's service.

The basis of the library's collection, as well as how it is developed and maintained, rests within its mission and the service priorities it has established through a formal or informal planning process. Many libraries use the Public Library Association's (PLA) planning process and, at least to some extent, subscribe to that process's concept of 'service responses.' Although the names of the service responses advanced by PLA were revised in 2007, the concepts behind those labels remain very similar to the older ones that may be more familiar to library staff. Whether the library describes one of its primary service responses as 'Get Facts Fast,' the new label, or the older 'General Information,' the materials in the collection will need to support the services and needs that go into the service priority. A library that strives to provide current reading resources and general information must have a collection that is up-to-date and easy to use.

Good library management principles begin with a planning process and an analysis of the needs of the community being served by the library. Whether you use a process like the Public Library Association's Planning for Results[1] or another planning process, knowing where the library is and where you want it to go is the first step in weeding. Even if you do not have a formal planning process, it is likely that you have some idea of what the community wants from the library and know what you need to do to accomplish that mission. As you make decisions about the budget, look for additional sources of funds (such as grants and gifts), and select material to add to the collection, you must also keep in mind what is already in the collection and, perhaps of equal or greater importance, what needs to be culled from the collection. As good library managers, we have a responsibility to maintain a collection that is free from outdated, obsolete, shabby, or no longer useful items. It's a little like Newton's Third Law of Motion: For every action, there is an equal and opposite reaction. For every item we put on the library shelves, we should at least be considering whether there are items that need to be removed.

Many of us work in libraries because we love books and information. We may need to overcome our own sentiments that hold us back from weeding. "In too many libraries, collection development is actually based on the book as an object. Public libraries should not be in the business of accumulating physical objects. The purpose

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[1] *The New Planning for Results,*
http://www.elearnlibraries.com/courses/the_new_planning_for_results/index.html

should be to provide the content that is needed and used by the public."[2]   Even if we understand that it is the information contained within the book that is important, we may have to address concerns and excuses presented by others who insist that we hold on to every item in the collection.

However, if you look at the place of the collection within the library's mission and how a poorly maintained collection negatively impacts the ability to meet that mission, it should become clear that weeding is an important part of the process. Although they should be broadened to include all types of materials, keep in mind Ranganathan's Five Laws of Library Science[3]:

1. Books are for use.
2. Every reader his book.
3. Every book its reader.
4. Save the time of the reader.
5. A library is a growing organism.

The Cycle of Service: Where CREW Fits In

Collection development is clearly an important part of library service. It can be easy, however, to view only one or two parts of the process, focusing only on getting materials into the collection or getting them into the hands of our patrons.

The diagram below represents the flow of both direct and indirect library services; it is circular because each process leads to the next and involves ongoing routines, procedures, and practices that continuously add to, remove from, evaluate, and adjust the collection to fit the current and future needs of the library's users and potential users.

SA is the **S**election (usually through reading reviews, perusing catalogs, and considering patron requests) and the **A**cquisition (ordering and paying for) of the library's materials.

CP is the **C**ataloging (including classification) and **P**rocessing (property stamping, bar coding, entering into the online catalog, etc.) of the same materials.

CR is the **C**irculation and **R**eference step, in which the prepared materials are out on the shelves being used both in-house and through borrowing by patrons and the reference staff.

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[2] "Commentary on weeding". Library Administrator's Digest. Feb 1999. FindArticles.com. 13 May. 2008. http://findarticles.com/p/articles/mi_qa3858/is_199902/ai_n8843523

[3] Ranganathan, Shiyali Ramamrita. *The Five Laws of Library Science*, Asia Pub. House, 1963.

The method called CREW (**C**ontinuous **R**eview, **E**valuation, and **W**eeding) integrates all the processes into one smooth, streamlined, and ongoing routine that assures that *all the necessary indirect services* are accomplished in an effective way. This method makes it easier to routinely remove outdated and unused materials from the collection while also learning where the collection has gaps or needs new items.
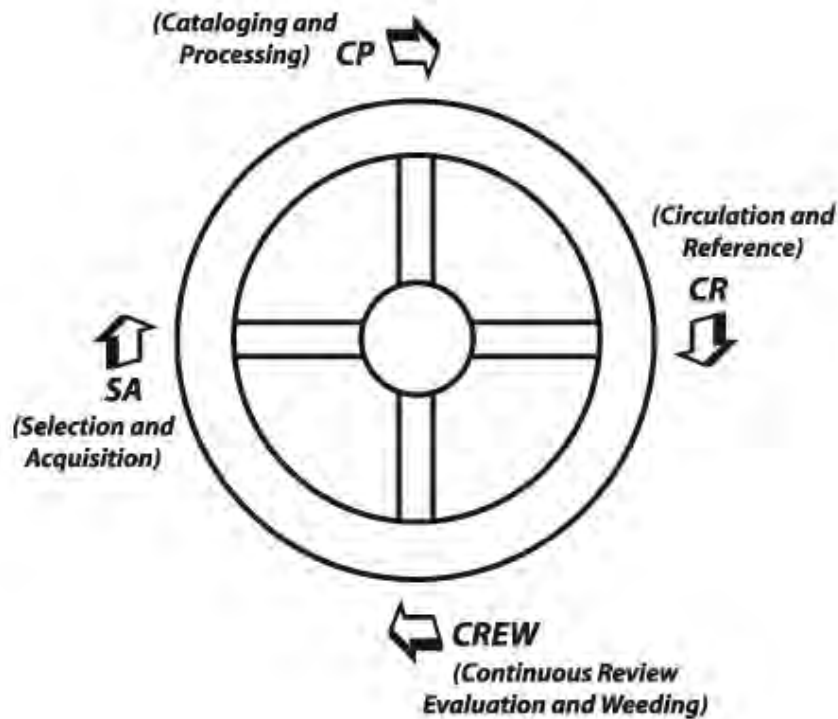
Immediately after entering Circulation and Reference (CR) use, the library materials enter the CREW processes of inventory and maintenance. Every item has a useful life cycle. Often a new item will be very popular at first, circulating frequently in a short period of time. Then the item may sit on the shelf, going out only occasionally. Eventually, in many cases, the item becomes worn, the information becomes outdated or is superseded by new information, or the topic or the treatment of the topic simply is no longer of interest to many users. When, through evaluation and the intentional process of weeding, the librarian discovers that the material's useful life is over, the item is retired by removal from the collection. Meanwhile, CREW is generating information on the current strengths, weaknesses, gaps, and saturation points of the collection that the librarian can use for another round of Selection and Acquisition (SA).

At each step, the library professional uses special knowledge of library science and library materials, as well as information about the particular community being served, to meet the needs and demands of the library's users and potential users. CREW is a vital part of good library service. A library that does not evaluate, weed, or discard is like a cart wheel with a fourth of its rim missing (see illustration above). Is your library having a rough ride on such a broken wheel? CREW to get back on track!

Why Weed? Why CREW?

Why are these CREW functions so vital for a dynamic, useful community library? Don't many community libraries do just fine without weeding? Isn't CREW simply a fancy name for throwing away books and impeding a library's growth? Aren't we censoring when we throw out books that someone might want to read? What if we make a mistake?

If you are asking these questions, you are not the first librarian to do so. CREW addresses these concerns and others but let us focus first on the benefits that are derived when you have a well-weeded collection.

The Six Benefits of Weeding

There are six major benefits of weeding the collection.

1. **YOU SAVE SPACE**. Shelf space costs money in a variety of ways, not the least of which is the actual cost to buy additional shelving to house more and more materials. A well-maintained collection saves the cost of dusting books that no one is using and of shifting materials to make room for more items. Patrons lose patience trying to find items that are crammed onto overcrowded shelves. The library staff will not need to fill the bottom shelves or pile books on top of the stacks, and the library will be more attractive and easier to use. Good practice says that shelves should never be more than 85% full (and 75% is even better). In addition, retaining unused material takes up shelf space that could be used to display recent items. The online catalog uses database space that may precipitate the need for more computer memory. Not having to add more shelving ranges may even allow the library to provide, or retain, space for tables and chairs for in-house study or for additional computers. Weeding allows you to maintain the open, friendly appearance that is the hallmark of a good community library.

2. **YOU SAVE THE TIME** of patrons, staff, and best of all, yourself. Shelves crowded with ragged books with illegible markings cost time. Patrons looking for a particular book have to sort through items that are clearly not of use or that they don't want to touch. Staff trying to shelve returned items has to shift and reshift books to make space. The librarian trying to use the collection for reference or reader's advisory services must peruse outdated items to find the correct, current information. An excess of citations from the online catalog that lead to outdated or unusable materials slows searching and frustrates users. Library housekeeping, from dusting to shifting sections, is impeded and made more backbreaking by an overload of useless books and other materials.

3. **YOU MAKE THE COLLECTION MORE APPEALING** by replacing ragged, smudged books and unattractive rebinds with attractive new books. Even perennial favorites and classics benefit from being replaced by clean copies with updated covers. Circulation can be increased by simply making the shelves look more attractive and user-friendly, even if there are actually fewer

books. It is better to have fresh air and empty space on the shelves than to have musty old books that discourage investigation. Many libraries report that patrons assumed they had purchased a lot of new books when all that was done was to weed vigorously.

4. **YOU WILL ENHANCE YOUR LIBRARY'S REPUTATION** for reliability and currency and build public trust. Patrons expect that library materials are selected by experts and that the information is up-to-date and reliable. For many users, especially younger people, the mere fact that a book is in the library lends authority to it. A section of astronomy books that include many pre-Hubble space exploration books or books that include Pluto as a planet create a credibility gap of astronomical dimensions! Nothing will discourage a student as much as writing a paper based on research performed with library materials that provided obsolete or erroneous information. The public counts on the library providing accurate information. Patrons quickly decide that the library has 'nothing' of value if they sort through a lot of outdated material.

5. **YOU WILL KEEP UP WITH COLLECTION NEEDS** because the CREW method provides a **CONTINUOUS CHECK** on the need for mending or binding, alerts the library staff to lost or stolen books in need of replacement, and guarantees a more accurate volume count. This process also allows for both on-going weeding, where shabby items, superseded items, or unused items can be removed almost without effort, and scheduled weeding where you look at specific areas of the collection on a regular basis. Library staff that weed continuously have greater knowledge of the collection.

6. **YOU HAVE CONSTANT FEEDBACK ON THE COLLECTION'S STRENGTHS AND WEAKNESSES**. This information can be helpful when soliciting donations and making decisions about purchases. For example, knowing that the business books are out-of-date, the librarian can approach an organized group or an individual and request specific assistance in building an area of special interest and usefulness to them. CREW keeps the present shape of the collection clearly in mind and helps in planning future directions for it. CREW helps the librarian see the cohesion of every task performed in the library and the purpose of every task in relation to the patrons and the collection.

These advantages of weeding, and in particular of using CREW, point out the truth of the old adage: Less is more!

How Much Do I Weed and When?

The CREW method calls for systematic and continuous weeding of the collection, but what do these terms mean? Staff may think that it is not possible to weed a little bit every day, but in fact with a little practice, that is exactly what we can do. If staff and volunteers are trained to look for shabby and outdated items, these materials can be pulled for review by the appropriate person on a weekly basis. Reports can be generated from the online catalog on a quarterly basis to identify items that are 'shelf

sitters' and haven't circulated within a reasonable period of time. Volunteers can do a lot even if they only spend an hour a week looking for these items, as well as identifying duplicates that may no longer be needed. Monthly targets should be established for looking at specific areas of the collection and *intentionally* weeding a small area.

It's not enough to weed every couple of years or only when space is getting tight. A vital, viable library collection is reviewed on an on-going basis. *Texas Public Library Standards* [4] includes goals for collection age and frequency of weeding the entire collection. Regardless of size, the entire collection should be reviewed and weeded if necessary, at least once every five years.

But how much is enough? Can we weed too much? That is a question that has to be answered locally. In general, you should weed about the same amount as you are adding to the collection unless you are in a developing mode, such as when a library first opens or has expanded. Your available shelf space establishes the upper parameter of the collection size and every item in the collection should be useful to the community being served. Once the collection has matured, it will remain fairly stable until something changes—such as adding on to the building.

A rule of thumb held by many library professionals is that about 5% of the collection be weeded every year.[5] This allows for turnover of the collection every twenty years. While this doesn't literally mean that no book that exists in the collection in the year 2000 will still be there in 2020, even classic literature and perennially useful materials will generally become worn and tattered after twenty years of use and need to be replaced with a fresh copy. More important than raw numbers, however, is the librarian's commitment to making weeding part of the regular duties and responsibilities that are addressed every week.

Before You Weed

Materials selection and deselection are similar activities. First, they are both necessary parts in an effective collection development program; and second, both require the same type of decision-making criteria. The same factors that lead to the decision to add an item can also lead to a decision to remove that item sometime later.

Before implementing any kind of weeding plan, carefully evaluate the library's collection development policy and goals for the collection. If you don't have a collection development policy or it is outdated and has not been reviewed in recent memory, now is the time to rectify that situation. Goals are based on the roles that the library plays in the community and the service responses or priorities that have been selected for the library. Although the mission of the library may remain constant over a long period, the goals may change from time to time. The mission, goals, and

[4] Texas Library Association. *Texas Public Library Standards*, 2004. http://www.tsl.state.tx.us/plstandards/

[5] Slote, Stanley J. *Weeding Library Collections*. Libraries Unlimited, 1997. p. 14.

selection policy help to determine the weeding policy. With these factors in mind, a collection-centered evaluation will give a better idea of what the collection consists of and identify specific classes of materials that offer likely candidates for weeding.

The collection development policy (also sometimes called the materials selection policy) should provide criteria to follow for depth, coverage, and selection of the overall collection. The scope of the policy should be broad enough to include all of the materials in the collection and may include subsections, such as reference, nonprint, juvenile, large print, and adult. The policy should specify how gifts will be handled and indicate when and how to retire outdated materials. It should also list appropriate means of disposal. When developing or revising a collection development policy, keep in mind that the individual needs of the library and its users must be considered in making all policy decisions. While it is appropriate to review collection development policies developed for other libraries, it is not acceptable to simply adopt another library's policy as your own. A quick Internet search will provide many examples and books, including *The Public Library Policy Writer: a Guidebook with Model Policies on CD-ROM* by Jeanette Larson and Herman L. Totten, offer assistance in the development of a collection development policy.

Criteria for Weeding

Several factors must be considered during the weeding process. These factors include:

- The library's selected service responses and resultant goals
- The needs and demands of the library's community of users
- The availability of more suitable material
- The ability of the budget to provide funds to purchase more satisfactory items
- The relationship of a particular item to others on that subject
- Cooperative agreements with other libraries and the ability for patrons to use other libraries in the area
- The degree to which the library serves as an archive or local history center
- The possible future usefulness of a particular item
- The availability of more current information on the Internet
- The ability of the library to borrow the item through interlibrary loan

During the weeding process, you may also wish to check the library's holdings against any centralized databases (union catalogs) to which the library belongs. It may be easier to weed titles that are not circulating if they can be easily obtained from another library through interlibrary loan. Also, consult standard bibliographic aids when evaluating the quality of a particular item if you are uncertain about its value to your collection. See the Bibliography for a list of standard collection aids, as well as subject specific guides that may help you make decisions.

What to Weed: General Guidelines

More detail will be offered about weeding specific areas of the collection, types of materials, and Dewey areas later in this manual, but some general guidelines pertain to the entire collection. Some criteria are objective, but most include some degree of subjectivity that will require the professional knowledge of the librarian in making the final decision about a particular item. Keep in mind that these criteria can be used as a 'rule of thumb,' but for some criteria, recent use may be an important factor in deciding to retain an item that you might otherwise remove from the collection. If the item is outdated or contains erroneous information, weed the item and replace it with a newer title on the same subject.

For all items, consider the following problem categories and related issues:

Poor Content:

- **Outdated and obsolete information** (especially on subjects that change quickly or require absolute currency, such as computers, law, science, space, health and medicine, technology, travel)
- **Trivial subject matter**, including topics that are no longer of interest or that were dealt with superficially due to their popularity at a specific point in time, as well as titles related to outdated popular culture
- **Mediocre writing style**, especially material that was written quickly to meet popular interest that has passed
- **Inaccurate or false information**, including outdated information and sources that have been superseded by new titles or editions
- **Unused sets of books** (although you may keep specific volumes if they meet local needs and are used)
- **Repetitious series**, especially series that are no longer popular or that were published to meet a popular demand that no longer exists
- **Superseded editions** (in general, it is unnecessary to keep more than one previous edition, discarding as new editions are added)
- **Resources that are not on standard lists** or that were never reviewed in standard review sources
- **Material that contains biased, racist, or sexist terminology or views**
- **Unneeded duplicates**, especially if they are worn or tattered
- **Self-published or small press materials that are not circulating**, especially if they were added as gifts

Materials/Books of Poor Appearance:

- **Worn out, ragged items**
- **Poorly bound or poorly printed editions**
- **Rebound editions that are worn** and shabby or have torn pages

- **Items that are dirty**, shabby, warped, bug infested, or otherwise marked up, mutilated, or 'edited' by patrons
- **Books with very small print or poor quality pictures**
- **Scratched CDs or DVDs**, brittle film or magnetic tape (in the case of video and audiocassettes)
- **Media that is beaten up** from wear or has broken or missing parts
- **Books with yellowed, brittle, torn, taped, or missing pages**
- **Books with dust jackets or cover art that is dated**, especially on children's and young adult books

Unused Materials:

- **Items that have not circulated within the past 3-5 years** and not actually used for reference or in-house research
- **Duplicate copies** that are no longer needed, regardless of condition
- **Periodicals that are not indexed**
- **Periodicals that are available** in full-text databases
- **Unused volumes** in sets or series
- **Unneeded titles** in subject areas that are less frequently used
- **Materials on the 'hot topics' that were popular more than five years ago**
- **More books than are needed** on any single subject
- **Formats that are no longer popular** in your community, especially if the technology needed to use the format is no longer owned by people in the community
- **Material that is no longer important** to the collection because of changes in local demographics, school curricula, or other factors

Checklist of Weeding Factors

For all materials, consider:

- **Date**—when was the item published? When was it added to the collection?
- **Author**—is the author still read or likely to be read in the future? Is the book a lesser work?
- **Publisher**—was the book self-published or published by an 'instant' press that may not have taken care in editing and printing?
- **Physical condition**—are there any factors that make the item unattractive?
- **Additional copies**—are more copies available that may be in better condition?
- **Other books on the same subject in the collection**—if this book is discarded, what else is available?

- **Expense of replacement**—can the item be replaced? Was this an expensive item that might benefit from rebinding or refurbishing rather than replacement?
- **Shelf-time**—how long has the item sat on the shelf without circulating?
- **Relevance of the subject to the community**—is the material of interest to anyone in the community?

For juvenile and young adult materials, also consider:

- **Format**—paperbacks are preferred by many young adults; board books get a lot of wear in tiny hands.
- **Reading level**—is the level too high or too easy for young patrons who would be interested in the item?
- **Current interest in the subject matter**—are young people interested in the subject? Is the treatment of the subject engaging?
- **Visual appeal**—are the illustrations in color? Are photographs clear? Is the layout of the book open (white space) and inviting?
- **Jacket art (contemporary vs. outmoded)**—does the book look like something your great-grandmother read?
- **Use in school curricula**—are books available for the grade level where the subject is studied? Are teachers assigning specific titles?

For periodicals, consider:

- **Current use**—few periodicals are used five years after the publication date
- **Interest in circulating older issues**—does the library permit older issues to be borrowed? Does the community want to borrow older issues?
- **Indexing available**—is the periodical included in standard indexes?
- **Full-text availability in online databases**—will patrons find the articles needed for research in the library's online databases?
- **Space available**—does the library have space to store older issues that are not used on a regular basis?

Retain local history except when the item is shabby and beyond repair. Retain writings by local authors during their lifetime and materials with local settings unless they have not circulated within the previous five years (or if a major milestone celebration is coming up that would allow for these items to be put in the spotlight).

Sets and series often have one or two volumes of special merit or that are regularly used even when other volumes are not. Retain these volumes even though the rest of the set is discarded. Some older reference volumes, such as quotation books, should be kept unless they are in poor condition, because later editions augment rather than supersede prior editions.

It is a good idea to include in the selection policy a list of items that should not be weeded without careful consideration and deliberation (e.g., genealogy, local authors,

Caldecott and Newbery Book Award prize winners, etc.). Except in very special situations, usually related more to public relations than to collection development, there are very few books or other items that should be retained if not used by library patrons.

If you can't bear to let go of a beautiful book that is in good condition, consider whether it is classified properly. Browsers might be missing an item because it is in the wrong Dewey area. Perhaps the subject headings are not correct so it is not being found during catalog searches. It is perfectly acceptable to recatalog a book to make it more accessible to patrons.

Remember that **guidelines are not intended to act as a substitute for professional judgment calls and common sense**. For example, a sixty-year-old National Book Award Prize winner that has not circulated in more than ten years is simply taking up valuable space and should be discarded even though the library policy may encourage the retention of books that have won awards. (It will be available through ILL if someone wants it, or it will be released in a new paperback edition if Oprah or some other book club discovers it or it is made into a movie.)

Beginning the Process

It is by far easier to add materials to the collection than to withdraw them. Every librarian can imagine a potential use for the items selected for inclusion; otherwise we wouldn't buy them. Because we can imagine users, even potential ones, it can be difficult to discard an item that is outdated or hasn't been used in recent memory.

Even though they may recognize the necessity for weeding, many librarians are uneasy about actually doing it because the weeding process seems unstructured, subjective, and even a little arbitrary—all factors which cause them to procrastinate indefinitely or to weed sporadically or indecisively. It is, of course, also difficult to find time to do everything we need to do in a day; therefore, it is easy to put off weeding while we focus on adding materials to the collection, sorting through gifts, or helping patrons find materials. To help structure the weeding process, and to help librarians and library staff feel more confident doing it, the process can be broken down into manageable steps.

The actual methodology of CREW is intentionally simple. The original procedures established in the first edition have been streamlined through field tests and careful discussions of actual situations in real community libraries. Top priority in a community library is appropriately focused on direct service with a human touch. To cut the time and effort required for indirect services, such as weeding, the CREW method has been streamlined into ten steps, in four time groups, with allowance for stopping this work to attend to patrons and administrative tasks. As you will see, the first step need only be done once, at the beginning of the process (although all library policies are subject to revision when necessary); the other nine steps form an ongoing process that may be continued forever.

Weeding Responsibility

One frequently asked question is: Should weeding be done only by the head librarian, or may it properly be delegated to other staff? A good rule of thumb is if staff is not taking part in selection of materials - then they should not make a final weeding decision. The primary responsibility in any library must be the purview of staff members who can consider the collection and the library needs from both a broad and long-range perspective. These staff members have developed expertise through many regularly scheduled hours working with and thinking about the collection; they are committed to the principles of library management in accordance with the collection development policy and goals of the library. Rules can be used to help cull materials for consideration, but effective weeding requires using good professional judgment. For example, the rule may state that all children's picture books that have not circulated at least once in the past year will be considered for weeding. However, the children's librarian must still evaluate those books to ensure that materials used for storytimes or in-house programs are not unintentionally withdrawn from the collection.

The librarian should never delegate the weeding *evaluation* function to a volunteer, although volunteers may certainly pull worn and damaged books to be considered for

weeding. It may also be helpful to develop guidelines for volunteers and support staff to follow while shelving so they may pull potential weeds from the shelving cart. In addition to checking publication and circulation dates, volunteers and clerical staff may also pull from the stacks (1) any book with a copy number greater than two, if more than two copies are on the shelf; (2) any book superseded by more than one later edition—again, only if the later editions are on the shelf; and (3) any books in ragged or poor condition that may be candidates for mending, binding, or withdrawal. Several librarians have, in fact, suggested that volunteers and aides can help by pulling books based on a technical processing factor that provides a date for the book. For example, if the library switched from using Cutter numbers[6] to using the first three letters of the author's name on spine labels in 1999, you can ask a volunteer or aide to pull all books that still have Cutter numbers on the spine label. The type of barcode used or the shape of the barcode may also indicate books that were in the collection as of a specific year. The items will still need to be reviewed by the librarian before a final decision is made, but quickly identifying books that are ten years old is a big help.

The librarian may also wish to recruit the talents of local experts for particular subject areas (e.g., high school English teachers or college instructors can evaluate the literature section, while area math and science teachers can assess the value of items in those parts of the collection) or languages (e.g., a Spanish-language instructor can help you assess the quality of translations or the relevancy of the Spanish to your community's readers). Be sure to orient these local experts about the library's mission before they start. Small and medium-sized public libraries are *not* research libraries that need to retain material for historical research.

Team weeding, where several librarians from one area join forces to cull each other's collections, is also an effective method of separating the wheat from the chaff in library holdings. Similar to the old-fashioned barn raising, this can be an invigorating and quick way to weed where many hands (and minds) make the work go faster. In each case, the final weeding decision is left to the professional judgment of the resident librarian.

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[6] A Cutter number is an alphanumeric method for representing the author's name by using one or more letters from the last name followed by one or more numerals that also represent part of the author's name. This combination of letters and numbers follows the Dewey Decimal classification number to achieve alpha-numeric organization of materials. The numbers come from a table developed by Charles Cutter. Because of the extra step needed in processing, many public libraries have dropped this system in favor of simply using the first three letters of the author's last name.

CREW in Ten Steps

Step One

Make weeding a part of policy. Policies define actions and decisions. They also help staff deal with issues that will arise during the course of doing business. Policies are best discussed and set in place before problems occur. A weeding policy should be part of the standard policies for every public library. All policies should be approved by the library's board (whether it is a governing board or advisory board) and by the library's governing authority (if that authority is not a governing board). The approval of a written weeding and discarding policy is a powerful and necessary defense against possible controversy. If a selection policy (a highly recommended item) already exists, the weeding policy could form an amendment or appendix to it or it may be written as a separate policy statement. Policy development also allows for discussion of issues related to weeding library materials.

Check for legal regulations that may impact how discarded materials are handled. Some town charters or city codes contain rules about disposal of public property, including library materials. If a selection policy does not already exist, take the time to develop one and have it approved by the library board, city council, or other governing body. See Bibliography – Further Readings for books on issues related to the development of these policies, and many examples are also available online. While a policy from another library may serve as a model or template for your library's policy, you must still carefully consider the issues and develop a policy to meet your library's needs and fit your community.

As part of the materials selection policy, a gift policy should be established that allows the library director to accept, decline, and dispose of gift books and other items according to the collection development needs of the library. In addition to helping the library make decisions about which donated items to add to the collection, a good gift policy stipulates that items received as gifts are subject to the same decisions as items purchased with library funds. This avoids hard feelings when a donated book is later weeded.

Library staff is not usually qualified to appraise items and should not set values for tax purposes. A sentence stating that the library will not make any attempt to appraise values of donated materials for tax purposes may also be included in the gift policy. For guidance, refer patrons to the Internal Revenue Service (IRS) Publication 561, *Determining the Value of Donated Property*, http://www.irs.ustreas.gov/pub/irs-pdf/p561.pdf and also the online guide from the ACRL Rare Books and Manuscripts Section of the American Library Association, *Your Old Books*, http://www.rbms.info/yob.shtml which lists resources for the evaluation and appraisal of books, questions and answers on what makes a book rare, and suggested organizations that welcome book donations.

The Fair Market Value (FMV) of an item may be taken as a tax deduction, but it is up to the donor to establish that value. An old book is not necessarily a valuable book, and if it were a valuable, rare book, it probably doesn't belong in the library

collection. IRS rules now also stipulate that household goods must be 'in good used condition or better' in order to take a deduction. Therefore, some libraries now decline to accept, or at least to give a receipt for, old moldy books that will most likely be immediately discarded.

Following are sample statements that can be added to the library's selection policy regarding acceptance of gift books and weeding:

WEEDING: Materials that no longer meet the stated objectives of the library (including items that have become damaged or obsolete) will be systematically withdrawn according to the accepted professional practices described in the publication, *CREW: A Weeding Manual for Modern Libraries*. Disposal of withdrawn library materials will be at the discretion of the library director, subject to all relevant provisions of the Charter of the Town of _____ and the statutes of the State of Texas.

DONATIONS: The _____ Library is pleased to accept gifts and/or memorial gifts from patrons. Gifts are gratefully and willingly accepted as long as no restriction is placed upon their use and disposition. Acceptance of gifts (of books and other library materials) will be determined by the library director on the basis of their suitability to the library's purposes and needs in accordance with the library's stated materials selection policy. Use of all gift materials will be determined by the library director or a designated agent. The library has the right to discard any gifts that are in poor physical condition (e.g. brittle paper, water or mildew damage, torn and/or missing pages). Values will not be placed on donated items for income tax purposes but receipts will be provided for items in good or better condition.

Step Two

Gather usage statistics of your library's collection. Reports allow you to analyze and document areas of greatest usage and most need. This can be very helpful when setting budgets or looking for grant funds. If you know that the books on health and fitness circulate an average of four times per year, you know that you will need to update and replace titles more frequently than you will for another area with materials that only circulate an average of once a year.

Your circulation statistics should break down borrowing usage by classification of topic areas as well as by types and levels of materials. For example, you should be able to run a report that tells you which juvenile fiction books have not circulated in the past year. Many circulation systems also allow you to limit your query to only books that have been added to the collection prior to a certain date so that you don't generate a list of new books that have not had time to circulate. If you are not sure what reports are available from your integrated library system (ILS), check with the vendor. You may be surprised at the depth and breadth of information that is readily available to you.

Statistics on reference collection use and data on types of questions being asked in your community should also be kept on an ongoing basis or gathered through regular sampling. It is also good practice to regularly sample in-house use of materials to gather data on items that may never be checked out, although they are used in the library.

Step Three

Build weeding into the year's work calendar. Set priorities and schedule the time when you will weed the collection. Those specific areas of the collection that are most in need of weeding or those that will be handled for a specific reason, such as barcoding or relocating, should be weeded first.

In a perfect world, one CREWing of an entire collection would take approximately a year, although the first, most thorough CREWing may well take longer, especially if the collection is older and has not been weeded in years. That does not mean that you physically handle every book in that year, but some thought is given to each area and, at the very least, older, worn books are removed. Some standards, including *Texas Public Library Standards*, 2004, recommend a thorough weeding every three to five years.

Allow plenty of time for the CREWing. If done in a careful manner, weeding can be a slow process requiring thought and judgment. If there is a peak season for one type of book (e.g., the 500's are heavily used just before the school science fair is held), schedule that section well before or well after that time to make the inventory more accurate. While it would be ideal to do the weeding during slack hours and slow seasons when there will be minimal distractions, in reality, few libraries experience these times. The librarian who is waiting for a slow period to weed will be waiting a very long time. Setting aside specific times to weed makes it part of your routine. Scheduling tasks also allows you to use volunteers and aides to help.

Step Four

Gather the following materials on a book truck at the shelves to be analyzed:

- A computer printout of the section being reviewed
- A blank note pad and sticky notes (like Post-It Notes™)
- A pen and/or colored pencils
- A shelf marker
- This manual (or a copy of the *Overview Chart of CREW Formulas* found in Appendix)
- An empty book cart
- Supply of disposal slips (see Appendix)

Ideally, before working on a specific section, shelves should be read to ensure proper item order. You may also want to schedule volunteers to cull shabby books and extra multiple copies. This will make the process easier and more accurate and reduce the urge to reshelve misplaced items or get distracted from weeding.

Step Five

Study the area you will be weeding as a whole. Examine each item in turn, checking for physical condition, last circulation date, copyright date, and appropriateness for your collection. Allow time for breaks to stay alert. Do not do so much at one time that you lose concentration and good judgment. Refer to the CREW Guidelines by Dewey Class in this manual, to learn general subject considerations. Do feel free to alter the formulas to fit your particular needs, using your experience and knowledge of your community. Take the time to record any guideline alterations in the margins of this manual to maintain local consistency.

If you are uncertain about your decision, check the library's holdings, any union catalogs to which the library belongs, and bibliographic aids (see Bibliography). Remember that some subjects are classified in other Dewey areas. If you are undecided about a marginal title, also check the holdings of other branches or nearby libraries. If it is readily available elsewhere, you can feel more secure about your decision to discard it.

Place a Post-it Note™ on those books needing attention or discard (marking the category of handling needed), and reshelve the books that are fine 'as is.' If you stop the work temporarily, mark the stopping point with the shelf marker and mark the last entry on the printout. As a double check, you may want to note the call number of the last book on your pad. You may also wish to make notes as you proceed for displays, booklists, or locally prepared indexes (e.g., an index to short story anthologies owned by the library).

Step Six

Inventory the library's holdings. While you are weeding, you may also choose to take inventory. When examining a book for weeding, make a check mark with a colored pencil on the verso of its title page or in any consistent spot unlikely to be noticed and erased by patrons (for example, the upper right hand corner of the title page). Make a corresponding mark on the printout for that book next to the barcode number for that copy or in a column you have added for this purpose (see CREWing with Computers for additional information).

Do not consider books that are not physically on hand, unless you have included loaned items in your print out (in which case the books that are on loan, but not overdue, can be inventoried with other titles in the area on which you are working). If a book is not on loan and is not on the shelf, highlight that item for further searching at a later time. If the item is not checked out and cannot be located within a reasonable period of time, consider it to be lost or stolen and withdraw it from the collection.

In all other cases, mark all books returned after you have weeded an area, or that are located at a later time, that lack the appropriate inventory check on their title page versos and their printout entries prior to placing them back on the open shelf. Any book still unchecked on the printout six months after that area has been inventoried may safely be presumed lost or stolen, unless you know it to be at the bindery or long

overdue and in the process of being retrieved. To ensure an accurate collection count, mark these books 'missing' and delete the entry from the online catalog.

Step Seven

Check the pulled books against any standard indexes and bibliographic resources in the library's reference collection or in databases available to patrons. If you are unsure about discarding a book or replacing it if shabby, this process will alert you to an item that might be used a lot by the reference staff. If paper indexes owned by the library, like *Short Story Index*, will continually be directing patrons and staff to the book you are considering discarding, its inclusion in the index might suggest exemption from the general rules of weeding. If the book is physically worn, then replacement, repair, or a change to non-circulating status may be warranted.

Check online databases to see if the title you are considering for discard is indexed there. Especially for poetry and literary criticism, works that are available online in full-text may make it easier to discard a book. However, keep in mind that even though some databases include full-text entries for poetry, short stories, etc., patrons may still want to borrow print copies of indexed material to browse and use at home. Even if the library subscribes to the electronic version of *Short Story Index* and the retrospective index, which includes full-text for more than 4,000 stories, consider keeping the collections that contain the original text unless the book is in such poor condition that it cannot be saved or is of minimal interest to your community.

Volunteers, interns, and clerical staff can help with this part of the weeding process. If the title is not in the index or bibliographic aid then it can continue through the discard process. If the title is included, then the librarian or a designated staff person would need to make the final decision.

In addition, standard indexes will often include lists of possible new titles to purchase. Often, these lists are available at the website of the index's publisher. For example, H.W. Wilson lists the dozen or so titles selected for inclusion in the January 2008 update of *Short Story Index*.

Step Eight

Disposal Slip
Book Title or Call Number:_____
    ❑ Bindery   ❑ Discard
    ❑ Mend/Preserve   ❑ Book Sale
    ❑ Promote   ❑ Replacement/New Edition
    ❑ Donate to: _____
    ❑ Sent To: _____
    ❑ Check Database for other locations of this title: _____
Other locations of this title:_____
Title to replace this volume: _____
Authorizing Agent:_____

Treat the books according to their slips.

1. **Bindery:** Prepare bindery forms for books needing binding and store them for periodic bindery pickup or mailout. We'll discuss binding later, but in general, use this option very sparingly.

2. **Mending:** Do the required mending or put the books aside for a clerk or volunteer to mend. Be conservative about mending. If mending takes more than about 10 minutes, consider replacing the item with a newer copy. Be careful about mending outdated items. While a new Mylar jacket can give new life to a shabby cover, no one wants to read a book that is filled with tape and glue.

3. **Discard:** Process the discards by removing or marking through all labels or stamps identifying the library; removing copy information from the online catalog; and, tearing off book pockets, old circulation cards and barcodes, stamping an appropriate designation such as 'discard,' 'withdrawn' or 'obsolete' on the inside of the front and back covers. Put the discards aside for the booksale, store them for an annual sale or donation to another library, or box them for garbage pickup or the pulp dealer. Remember to remove or cover any barcodes or identifying marks before disposing of any materials to prevent their being returned to the library by misguided but goodhearted souls who, for instance, may have bought them at a garage sale.

4. **Replacement:** Place aside for careful consideration each book needing replacement by a new copy, new edition, or better title on the same subject.

5. **Recycling:** The library should already be a scheduled stop on any recycling pickup program for newspapers, periodicals, and other recyclable materials. If recycling a much larger amount of material than usual, let the service know ahead of time so they can plan for the extra room needed in their pickup vehicle. Use volunteers to process any items that need to have covers removed, plastic coils stripped off, etc., before recycling. Keep in mind that books may not be accepted by local recyclers unless the covers are removed. You may need to arrange for a specialty company to pick them up. Also consider recycling by allowing patrons to scavenge discards that would otherwise be placed in the trash. (See also, What to do with Weeded Books: Types of Disposal.)

Step Nine

Replacement checking and ordering. At the conclusion of your work in a specific area, select and order replacements. Compare the weeded books that were set aside for replacement with titles in recent editions of collection bibliographies and indexes for possible newer titles.

Further, if the library's collection does not contain any recommended titles in a specific area, consider using collection bibliographies to locate appropriate recommended titles, unless there is little demand for that particular subject. Standard collection bibliographies, recommended lists, indexes, databases and further readings are provided at the end of this manual.

It may also be helpful to consult lists of award-winning books such as Pulitzer Prize Books, National Book Awards, Best Books for Young Adults (ALA), Notable Books (ALA), Newbery and Caldecott award winners and honor books, Bluebonnet and Lone Star reading lists (Texas Library Association awards), and Coretta Scott King Award winners, as well as bibliographies in *Library Journal*, *School Library Journal*, and *Booklist*. For children's and young adult books, as well as classics, consult local school and college reading lists. Also consider media attention, such as Oprah's Book Club picks, for titles that may enjoy a resurgence of interest for a period of time.

Check reviews of new books for the last year. Many review sources, such as *Booklist,* can be accessed in full-text through TexShare databases.[7] *Books in Print* lists replacement or supplementary titles and new editions. Pencil in a star or some other symbol on the flyleaf of each book slated for replacement before reshelving it and mark 'TBR' (To Be Replaced) on the computer printout. This step will alert you to pull the book when the replacement comes in. Prepare the orders for the replacements with the note, 'Repl. (call number)' as another signal to pull the older book when the new copy is received.

Step Ten

Set up displays for low circulating, high quality books that would benefit from exposure. Plan the displays to be colorful and relevant to current community concerns and interests or simply to provide an attractive and enticing display. If the book still does not circulate while on display, consider it as a candidate for trade or donation with another library or for discard due to lack of interest. Try placing displays in unexpected locations, such as near the checkout desk, where patrons might be tempted to take an extra book out or pick up a book for their child.

If done routinely every day, or even every week, this review of the collection will expand your knowledge of the library's holdings, give you a pool of possible reference sources, and prepare you for informed selection of new materials on the basis of actual usage and the real strengths and weaknesses of the collection. You may even want to coordinate selection of new science books to coincide with CREWing of the 500's. In this way, the relationship between the present collection, its use, and future directions will be strong and direct. Selection by subject grouping also makes it easier to evenly allocate purchases for each area of major demand, as opposed to random selection based on casually scanning issues of journals that carry reviews of books and nonprint materials.

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[7] EBSCO Academic Search Complete and MasterFILE Premier – *Booklist* Full-text; 1/1/2002 to present with a 14-day delay.

CREWing Children's Materials

Juvenile collections are as different from adult collections as children are from adults, and require different considerations for selection and deselection. To begin with, children as patrons often require an adult 'go-between' to find what they need for research and pleasure reading. A child browsing through the nonfiction collection may be completely lost unless he or she has been shown, and understands, how to find the materials needed. Children are even less likely than their adult counterparts to note the publication date and double check facts against other sources. They are particularly susceptible to outdated or inaccurate information since they do not always have the knowledge base to distinguish it, assuming that if it's in the library, it must be both true and current. This alone makes it critical to regularly weed outdated material from the collection regardless of how recently it last circulated. Parents often pick up everything on a topic for their child to use at home and children will take a book without considering that the information may be outdated and erroneous.

Inexperienced users of the juvenile collections can be easily misled and adult criteria cannot be applied in all cases. For example, an item may have been on the shelf for well over a year, completely ignored and unused, but if a skilled librarian matches the book to the right child, it becomes both useful and valuable to the collection. This is what makes individual guidance, use in story times, displays, and book talks so important for making materials accessible: they are what cause seemingly 'dead' collections to spring to life. Many books in the children's collection continue to be popular for decades but need to be replaced because of wear and tear.

The basic guidelines of weeding can be applied to both adult and juvenile collections. Naturally, the person who selects the materials should be the person overseeing the culling of the collection and making the final weeding decisions. As in adult collections, a weeding process that strengthens the entire collection, both in appearance and content, requires the judgment of a person who knows children's literature, as well as the audience the collection serves. The review of the collection should be **continuous**, with one full cycle ideally completed annually. In evaluating the collection, standard lists and review sources should be consulted.

General Guidelines

Juvenile Fiction

Be ruthless in weeding juvenile fiction. While many titles are used for class reading assignments, most fiction is leisure reading. Popular interest is the primary criteria for this section. Weed duplicate copies of past bestsellers if interest has waned, beginning by discarding the most worn copies.

Consider discarding older fiction especially when it has not circulated in the past two or three years. Also look for books that contain stereotyping, including stereotypical images and views of people with disabilities and the elderly, or gender and racial biases.

Replace worn editions of classics and award winners only if they are still in demand and can be replaced with attractive new editions. Unless your library serves a school of education or a library school, there may be little or no demand for decades-old award winners. Discard fiction books with drab, coarse, or heavy bindings that have dull covers, especially re-binds that replaced jackets with plain or patterned covers; they will not 'sell' to young readers. Purchase library editions sparingly; the bindings may last well beyond interest in the book.

Young Adult Fiction

Paperbacks are often the preferred reading format for teens. This section is almost entirely leisure reading and should be kept as current as possible. Anything older than five years should be kept only if it is circulating well; classics should be replaced with newer hardback or paperback editions.

Picture Books

Picture books receive heavy use and often are discarded due to poor condition, especially smudged or dirty pages. The content should be evaluated on the merit of the stories and illustrations. Given the wide range of possibilities to choose from in today's children's literature market, there is no reason this section should be anything less than the highest quality items, although it may also include lesser quality books of temporary popularity. Books of ephemeral interest, including those that feature trademarked characters and characters from television shows, should be withdrawn as soon as the popularity wanes. Be wary of donated books with weak bindings that do not stand up to constant use and abuse. Board books and books with moveable parts will need to be replaced more frequently, the former because they are chewed on and become soiled, the latter because the flaps, folds, and pop-ups wear out and tear.

Replace worn copies of classics and perennial favorites. Remember that parents and caregivers will visit the library, lists in hand, to find books for their children. If they don't find something after checking five or six titles, they will assume that the library has 'nothing to offer.' Purchase multiple copies of very popular books and standard titles. Use resources like the New York Public Library's "100 Picture Books Everyone Should Know," http://kids.nypl.org/reading/recommended2.cfm?ListID=61 for guidance.

Nonfiction

This is the area where many collections face the most difficulty. The misguided belief that 'anything is better than nothing' has perpetuated the retention of many outdated and inaccurate nonfiction items, often to the detriment of the child. At best, providing a student with information that is no longer current can result in a lower grade on an assignment. Outdated information also provides a warped and inaccurate view of the subject and results in a lowered regard for the expertise of the librarian. Parents, teachers, and children will then question the validity of the collection. It is better to lack enough information on a topic than to have erroneous information. In fact, the

need for more current titles on a particular topic can be a powerful leverage tool to make the case for more funding. Use the same general criteria for each area that is provided in the *CREW Guidelines by Dewey Class*, being especially attentive to weeding material that has not been used in several years or has been superseded by new editions.

Other Considerations

Simplified Classics also known as 'abridgements,' should be evaluated carefully. Although some may be useful for reluctant readers or adult beginning readers, they are often hackneyed, drab, and lifeless. Some exceptions include a few retellings of classics, like *Shakespeare's Stories* and Eric Kimmel's *The Hero Beowulf*, have received high praise and retain the spirit of the original while simplifying the text. If in doubt, check standard review sources, keeping only titles that were positively reviewed. Replace other titles with new hardcover or paperback editions of the full text.

Series Books may be well written and of high quality or be poorly written and without literary merit. Kids read series books for pleasure and, with guidance, often move on to better quality series and single titles. Replace low-quality series with newer editions of series favorites like the Hardy Boys, Nancy Drew, Chet Gecko, the Magic Treehouse and Junie B. Jones.

Be aware of whether the books are a series or if books are sequels or prequels to other titles. Replace missing titles in popular series if titles don't stand alone. Check resources like Mid-Continent Public Library's Juvenile Series and Sequels website, http://www.mcpl.lib.mo.us/readers/series/juv/title.cfm. Remember also that there can be series in most genres, including beginning readers and nonfiction.

Older Titles with shabby bindings, outdated illustrations, or torn pages should be discarded. Replace award books, such as Newbery or Caldecott, with newer editions if the books are still being read. Discard nondescript titles that were popular fifteen or so years ago in favor of newer titles with updated illustrations addressing contemporary issues.

Older Editions printed on thin paper with fine print or unattractive illustrations should be discarded in favor of newer titles. Old, worn classics should be replaced with new hardback or bright, attractive paperback editions. Be especially careful about keeping older titles for sentimental reasons, "But I loved that book as a child!" If children today are not reading the book, either bring it to their attention through book talks and displays or discard it.

Geography titles more than five years old are misleading and inaccurate and should be pulled. The older the title, the more inaccurate the content will be. Imagine how useless a title published before either of the World Wars

is to a student today working on a research paper topic from the 20th century! Although they may be interesting from an historical point of view, books on countries and states are of no value for contemporary social studies projects.

Science, Medicine, Inventions and other topics that change rapidly should be reviewed and updated every five years. Items more than ten years old should almost always be discarded. As in the adult collection, erroneous information about science, technology or medicine is potentially harmful to the patron who may attempt to follow instructions no longer considered safe.

Textbooks and material written specifically for curriculum purposes in public or private schools should be discarded, unless there is a strong demand from the community and they are updated every few years as the curriculum changes. If there is a substantial homeschooled population in the community and older textbooks are of interest to them, one alternative may be to locate textbooks in a separate section where they will be readily accessible.

Systematic CREWing of the children's collection is a necessary part of public library work, and should be done with a thorough knowledge of the collection and the literature. Children are less likely to grow up as library users and supporters if the collection holds little or nothing of interest to them or is perceived as being full of outdated stuff. When weeding is done in tandem with a strong, well-balanced book selection and purchase policy, the collection will enhance the overall library program and enrich the lives of the children and young adults it serves.

Two ideas for small libraries to keep in mind when judging the effectiveness of a juvenile collection are the 'boutique' theory and the 'bubble up' theory. A superstore-like atmosphere that offers 'everything under the sun' may be too overwhelming for young readers, especially if they have to cull through a lot of uninteresting material to find the 'good stuff.' A smaller, boutique-like selection of quality books will serve them better.

Multiple copies of high quality, popular books are more worthwhile than having single copies of many books that are not being used. It is also better to have several copies of a book like Maurice Sendak's *Where the Wild Things Are*, which is perennially popular, than to have single copies of books on monsters that no one is reading. Additionally, superior literature, like the proverbial cream, will 'bubble up' to the top, appearing on recommended book lists, award lists and the like. Libraries with limited collection development funds may prefer to wait for annual best books lists to choose blue-ribbon titles for their juvenile collections.

CREWing The Reference Collection

In most libraries, reference service is one of the most visible expressions of the library's mission and is key to many of the roles or service priorities selected during long range planning processes. In spite of the pervasiveness of the Internet, reference service remains vital in many libraries. Patrons find that they are frustrated by the amount of material returned in an Internet search and are often unable to determine the veracity of the information. Therefore, they turn to the public library reference staff and the collection. The community being served and the parameters of the reference service offered help to define the breadth and depth of the reference collection.

Reference collections have changed dramatically in the past decade because of the prevalence of online resources. Many reference titles that were standard in the past are no longer available in print formats or are supplemented by an online subscription that comes with the print version. Many libraries find that their reference collection is shrinking rapidly; however, a good ready-reference collection continues to be a vital component of good service. Still, "the paradox of the print reference collection is that it must be close at hand and yet openly available to users."[8] Without intervention by the librarian, many patrons don't know about the resources available.

The reference collection is an area of the collection where observation of patron use and cooperative collection development between libraries plays a role in your weeding decisions. Having ready access to reliable resources is more important than having a lot of electronic resources available that take time to access. Indeed, older titles, especially some that may be described as 'eccentric,' may be of more value than newer titles, the Internet, or electronic databases.[9] Therefore, it is vital that the reference collection be viable and useful, with outdated, inaccurate resources culled to make it easier to find useful information. This will require annual or even semi-annual evaluation of the collection.

The two basic tenets of CREWing reference collections continue to hold today: the automatic deselection of older editions that have been superseded and periodic evaluation by the librarian. Following your evaluation of how the reference tools are being used, you may determine that some items should be replaced more frequently than others or that you will retain specific types of tools longer than others. For example, if you have access to an online database that includes a good almanac, you may not need to replace the paper copy every year. Even though reliable dictionaries are now available online, you may want to purchase a new hardcover dictionary every three or four years to ensure that new words are included, transferring the older edition to the circulating collection if appropriate. Some of these items that should be updated yearly, or as new editions become available, are most useful for ready

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[8] Lampasone, Lauren. "A Time to Weed." *Library Journal*, May 1, 2008, p. 100.

[9] Wickens, Andy. "The Need to Weed," *American Libraries*, November 2005, p. 41.

CREW: A Weeding Manual for Modern Libraries. *http://www.tsl.state.tx.us/ld/pubs/crew*
Texas State Library and Archives Commission   *Page 33 of 93*

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reference services. If in doubt, consult resources like *Recommended Reference Books for Small and Medium-Sized Libraries and Media Centers* by Shannon Graff Hysell.

It is recommended that the library have a written collection development policy for the reference collection that outlines standards for selection and depth of coverage. Be sure to include information about foreign language reference materials, as more language dictionaries and other resources are being published each year. The policy should include criteria for the removal of outdated reference sources, which may involve keeping an older edition for a specific length of time, transferring the material to the circulating collection, putting it in storage, or discarding the item. This policy should also include information about exceptions to the general guidelines. For example, local history items may be retained forever regardless of condition or recent use. Many reference titles are more expensive than other books; a good policy helps the library avoid criticism for discarding expensive items.

Library reference collections now include websites linked from the library's home page, such as directories, government resources, and other popular ready-reference tools. While there is no 'cost' for acquiring these reference tools, be sure to check them regularly and weed out the ones that no longer work or are of limited value to patrons. Check the annual Reference Supplement to Library Journal, issued each Fall. This Supplement includes "Subject Listings,"[10] a round-up of recent and forthcoming titles in various formats that might serve patrons better. Also, each spring, *Booklist* provides updated information on current, recommended world atlases and dictionaries. Within each issue is the Reference Books Bulletin section that provides reviews of new reference resources.

Types of Resources

Regardless of the resources that are available electronically or via the Internet, some categories of reference resources remain important to most collections.

Encyclopedias

General comprehensive encyclopedias are quickly being replaced by online subscriptions and free encyclopedias like *Wikipedia*. Especially in smaller libraries, a set of print encyclopedias will allow multiple users to access information when all computers are in use. Generally retain at least one print encyclopedia, replacing it every five years. Texas public libraries have access to *Encyclopedia Britannica* through TexShare K-12 databases.

Subject encyclopedias, like *The Encyclopedia of Holidays and Celebrations: A Country-by-Country Guide*, should be updated when new editions become available or replaced by a similar resource every ten years.

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[10] "Subject Listings." In Reference 2008 Supplement to *Library Journal* v.132 no. 19 (November 15, 2007) pp. 13-58.

Almanacs

Almanacs are by definition published annually and generally include information arranged in tabular format or in subject fields arranged chronologically. While it is tempting to think that the Internet might have replaced print almanacs, that is not happening, and almanacs remain a staple on the ready reference shelf. Although almanacs may contain historical information, timeliness is critical and they are rarely useful after two years. Specialization and ease of use are key factors for these ready reference tools. Generally, almanacs should be updated annually, with older editions transferred to the circulating collection and then discarded the next year.

Regional almanacs may be retained for historic research, depending on the needs of the community. With few exceptions, there is no reason to retain outdated copies of almanacs, including books like *Chase's Calendar of Events.* Exceptions to this include older editions of the *Texas Almanac*, which may be retained indefinitely since each contains unique features that are not found in succeeding volumes, and specialized almanacs like *The Old Farmer's Almanac*, if local interest warrants and they are used regularly. For example, the 1994 edition of *The Texas Almanac* includes a list of major motion pictures filmed around the state since 1970 and the 2008-2009 edition includes a history of minor league baseball in Texas. Be sure, however, that the spine label includes the year as part of the call number so that the date is obvious to users. Even this exception may not be valid as more information is being put on the Internet. Many of the history features are now provided on the Texas Almanac online at http://www.texasalmanac.com. If the print editions are not being used regularly, discard them or move them to the Texana or local history collection.

Dictionaries

Unabridged dictionaries and general desk dictionaries should be updated regularly. Check to see if new words, usually mentioned in news articles each year, are included. For example, some of the new words included in the *Shorter Oxford English Dictionary, Sixth Edition* released in 2007, include 'carbon-neutral,' 'splitsville' and 'goody bag'.

Specialized dictionaries, such as those for abbreviations, slang, and acronyms, should be updated regularly. Older editions may be retained and added to the circulating collection, but watch to ensure that they are not sitting on the shelf unused. In general, biographical dictionaries can be retained until superseded by a newer edition. If the publisher stops publishing the print version of the dictionary, then find a more current resource. Biographical dictionaries that focus on a specific period of time can be retained indefinitely. For example, *Shapers of the Great Debate at the Constitutional Convention of 1787: a Biographical Dictionary*.

Foreign language dictionaries should be retained until a new edition is available unless they are unused. Update commonly used languages, such as Spanish and French, at least once every five years. Older editions can be moved to the circulating collection until they become shabby or cease to circulate. Be aware of changes in the needs of your community; as new ethnic groups move to town, purchase appropriate language materials.

Directories

Directories are normally discarded when newer editions arrive, although several years' worth may be retained if space permits and usage warrants. Keep in mind that some directories, like *The Statesman's Yearbook,* include a subscription to the online service with the print version. This contains archival information and may allow older copies to be discarded without loss of historical data. Telephone and directory information is now online. If you have city directories and local telephone books, which are useful for genealogical research, keep indefinitely as space permits. Older editions should be housed separately from the current editions; many of these resources are also available on CD-ROM.

Atlases

More maps are being made available online but good up-to-date print atlases allow patrons to peruse geographical elements or compare components of several maps. Usually revised every five years, comprehensive geographical atlases (*Oxford Atlas of the World*) should be replaced when updated. Although published in 1999, *The Times Atlas of the World* is still considered 'the pinnacle of atlases"[11] and should be retained until a new edition is available. Relatively inexpensive road atlases can be replaced every couple of years. Oversized atlases may require special handling to keep bindings intact.

Retrospective or historical atlases, such as *The Routledge Historical Atlas of Religion in America,* may be kept indefinitely as this information is unlikely to change, although new editions or recent publications may update interpretations of events or provide new information. Map books, including local street guides and atlases that deal with local areas and regions may be kept indefinitely. However, these are more appropriately placed in the local history collection, since patrons may not check copyright dates before using them.

Handbooks

Handbooks include a wide variety of resources that pull together a compendium of information on a specific subject or technique. Designed to be easily consulted, handbooks provide quick access to information. Issues such as ease of use, indexing, and other features are frequently the decision maker in weeding questionable handbooks. Many handbooks are updated regularly, and whenever possible, the collection should include the most recent editions.

Resources that deal with health issues, such as *The Physicians' Desk Reference*, must be replaced as soon as a new edition is available. Be cautious about adding older editions to the circulating collection, as outdated information may be dangerous.

Subjects in the humanities (music, art, literature) may be retained indefinitely based on usefulness, supplemented by newer texts. Social science reference tools are

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[11] "World Atlas and Dictionary Roundup." *Booklist.*
http://www.ala.org/ala/booklist/speciallists/speciallistsandfeatures3/worldatlas.cfm

considered outdated after ten years, by which time outmoded theories and practices are usually revised. Notable exceptions are handbooks that contain significant historical data. If local interest warrants, keep the most recent price guide for collectibles and antiques in the reference collection, moving the previous one or two editions to the circulating collection. Very rarely is there a reason to keep older price guides.

Science resources are generally outdated in five years, although texts on botany and natural history, especially those covering local areas such as *Little Big Bend: Common, Uncommon, and Rare Plants of Big Bend National Park* may be retained for longer periods. The most recent automotive repair manuals may be kept in the reference collection; older manuals should be moved to the circulating collection.

Indexes

Many general and subject specific indexes are being replaced by electronic databases. Still, a few important and useful works are provided only in paper format at this time. The library may want to retain older indexes, like *Song Finder*, that index material not included in online indexes. In general, paper indexes should be kept only as long as the library retains the materials cited, unless the index will be used to assist in interlibrary loan. In most cases, researchers needing historical information will use a university or large public library. Do not keep older indexes as a fall back in case the database is cancelled! In general, if an index has not been used within the past three years, it is highly unlikely to be used in the next three years.

Older editions of *Granger's Index to Poetry* may be kept if they index out of print volumes that have been retained by the library. Others, such as *Bartlett's Familiar Quotations* may also be kept, since newer editions delete some items while adding others.

Legal Forms and Information

Most libraries find that demand remains high for legal forms and sample documents in spite of the availability of materials in electronic formats. However, it is essential that these documents be up-to-date. Review annually for new editions of titles like *How to Do Your Own Divorce in Texas* (Nolo Press), titles that deal with bankruptcy and estate planning, and, of course, books on tax preparation. Older editions should be discarded as they contain too much outdated information and serve little or no purpose. If space permits and there is strong local need, keep tax preparation guides for three years to accommodate the needs of those with filing extensions, amended returns, or late filings.

CREWing Nonprint Media

It's a given that libraries today house more than just books and periodicals. In fact, our periodical section may be decreasing in size as our media collections are increasing. Even the smallest libraries have at least a modest nonprint collection that may include some or all of the following: DVDs, videocassettes, Blu-Ray, CDs, audiocassettes, Playaways®[12], book and media kits, art prints, phonograph records, and computer or gaming software.

The CREW method is just as effective in keeping nonprint collections accurate, up-to-date, and attractive as it is for traditional print media. Items in nonprint collections, particularly audio and film formats may still be thought of as 'special,' or somehow more valuable than printed materials, primarily because their initial cost may be higher and the collection may be limited. Evidence of this is often seen in shorter circulation periods, higher fines for overdue media and/or restrictions on lending nonprint media to young people.

Keep in mind that the physical format of the item is less important than its usefulness as a source of information or entertainment. The availability of hardware or other technology with which to use nonprint materials is a major question to consider when weeding the nonprint collection. It is important to know your community and the saturation or dissolution of the hardware needed to use nonprint materials. Don't keep a collection of vinyl records if very few people have a turntable available for use! Many libraries provide equipment for in-house use or to check out; be sure that the community is still interested in the format so that you are not simply taking up space for a format that has dissipated. Conduct a quick survey using a tool like Survey Monkey, www.surveymonkey.com, or Zoomerang, www.zoomerang.com, to determine local interest in formats.

Although the same general principles apply to weeding AV materials as those outlined previously for print materials, there are some marked differences that present challenges in the multimedia deselection process. There are still few standard lists of recommended multimedia titles by format, and those that are available quickly become dated. There are, however, some award lists that can be consulted. Only a relatively small percentage of the multimedia titles published every year are reviewed, and in some formats, there may not be any reviews available.

If the materials were selected primarily for entertainment value, weeding decisions will be based primarily on use, popularity, and wear. If withdrawal and replacement decisions will be based on content or subject coverage, rather than simply by usage and condition, then your decisions should be based on the specific goals of the collection. For example, even though they are used a lot less than other formats, Austin Public Library retains a large collection of vinyl records due to the local music industry. It can be more difficult to review nonprint items for relevance of content

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[12] Playaway is a self-contained digital audiobook, which requires no additional equipment for use.

and to check for wear since their formats require that someone view or listen to them. This review can also include loading software onto computers or game players. Decisions will often be made based on a visual examination, length of time the item has been in the collection, number of circulations, or a patron's complaint about the condition of an item.

One criterion to keep in mind while evaluating nonprint media for discard is that many libraries, as a regular part of their policies, will not loan or borrow audiovisual materials through interlibrary loan. Therefore, needed audiovisual materials will not always be available through this source. Other considerations are: physical condition, factual accuracy, visual and sound quality, instructional usefulness, and inappropriate or obsolete format (e.g., 16-mm film, 35mm slide sets, microfiche, Beta video). While many nonprint formats have passed from library collections, they may still be offered to the library as gifts.

Common Nonprint Materials

DVDs/Other Digital Video Disc Formats

DVDs replaced VHS videos several years ago and Blu-Ray may move to the forefront quickly. There are no real standards for the lifespan of various media. Under ideal conditions, theoretically, any medium could last forever. However, library use is not 'normal' use. Variations in the quality of playback equipment and handling can mean that some media will not hold up well with even minimal use. Each media format has its own idiosyncrasies for cleaning and handling. Library staff may, for example, be able to buff or clean away minor scratches on a DVD, but Blu-Ray discs require different handling as their hard coat can easily be buffed away, destroying the data. It is generally not worth a lot of effort to clean and repair media. Good equipment that may actually repair damage is expensive and requires a great deal of time (approximately 10-20 minutes per DVD, for example). Review Jim Scholtz's article in *Library Journal*, "To Repair or Not to Repair[13]" for an overview of the technology and a comparison of disc repair machines if you are considering trying to clean and repair discs.

Videocassettes

Fewer videocassettes are available for purchase and many libraries are only adding videos received as donations. Libraries struggling to maintain a collection in this rapidly disappearing format may be tempted to keep any videocassette regardless of interest, quality, or condition. Any video that has not circulated within the past year should be discarded regardless of its condition.

Although there are exceptions, it is probably not reasonable to expect that even under the best circumstances a videocassette can survive more than about 200 to 250 plays before experiencing problems from wear and tear. Some distributors use lower quality

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[13] Scholtz, James. "To Repair or Not to Repair." *Library Journal*, May 15, 2004, p22-25 [AudioVideo supplement]

videotape, thus reducing the price of their titles, but ensuring a shorter tape life. While many libraries rely on patrons to let them know when a videocassette has problems, it is wise to visually examine them for condition at least every 50 circulations. If you are evaluating for content, rely on patron circulation for all entertainment videos. For nonfiction or documentary videos, consider currency of the treatment of the topic; content accuracy; relevance of themes; fairness of racial, cultural, or sex role depiction; and the continuing relevance of the material within the library's overall collection development plan.

When examining the media collection to weed, break it down into smaller subject areas that can be easily evaluated. Clearly, any video that has not circulated in the past year should be considered for weeding, especially in the entertainment and feature film categories. However, travel videos and documentaries may circulate less often, and you may want to retain titles that have enduring value but are used less frequently. Keep in mind, however, that if a title hasn't circulated in two or three years, it is unlikely to be requested in the next two years.

For help in selecting replacement videos or in judging whether to keep a marginal item, refer to the *Video Round Table's Notable Videos* list at http://www.ala.org/ala/mgrps/rts/vrt/initiatives/notablevideos/index.cfm. The titles on this list are the best of the non-feature films (that is, they are educational, documentary, or how-to films) released during the previous and current calendar year.

DVDs

In general, the same criteria can be used in evaluating DVDs. Minor scratches may not impair usage and patrons will generally let you know if there are problems. Deep scratches usually cannot be easily repaired; the time and equipment needed to effect repairs don't make sense economically for small and medium-sized public libraries.

Discard entertainment and feature film DVDs that have not circulated at least once during the past year. There is either something wrong with the unit or patrons have lost interest in the title. Nonfiction DVDs may circulate less frequently, although certainly titles like Ken Burns' *Jazz* or The Discovery Channel's *Meerkat Manor* may rival circulation of feature films. Foreign films and films in languages other than English may also have limited circulation. However, certain communities may have more of a population of non-native English speakers. Keep items in languages used in your community if interest warrants.

Audiocassettes

Audiocassettes are rapidly disappearing from collections as producers are moving away from them. Music is almost impossible to find in this format and audiobook producers often charge more for audiocassettes than for compact discs. For younger children, new learners, and language courses, the format is popular because they are easier to back up and replay than other discs. If the format is still moving in your community, donations and aftermarket sellers (such as eBay) may be the only sources for acquiring items.

Content may include popular music recordings, language courses, or audiobooks and spoken word. Items in this format are somewhat fragile and easily damaged, but no more so than other formats. If a tape comes off a reel or breaks, there may be no way to repair it if the cassette casing is hermetically sealed. While many audiocassettes can be opened with small screwdrivers, it is not worth the time required to repair audiocassettes. Tape that has been mangled or twisted should be considered damaged and the cassette discarded. Although many publishers of unabridged audiobooks are no longer producing new titles in cassette format, they often will replace a damaged tape that is part of a set free of charge or for a nominal fee. Although you may not be able to replace them in audiocassette, sets with missing or defective language cassettes and manuals should be replaced if funds allow, regardless of the number of cassettes in the set or whether the entire set must be reordered. Incomplete sets may be included in an annual or ongoing booksale.

Weed music cassettes that have not circulated within the past year or two; CD is generally preferred. Weed audiobooks that have not circulated in the past two years, especially non-fiction titles that would be considered out of date in your book collection. Consider weeding abridged audiobooks, especially those that severely abridge the book, unless they are preferred by a large percentage of the community.

Compact Discs

CDs are the current format of choice for musical recordings, as well as audiobooks. Ideally, the popular collection should reflect all genres, styles, time periods, composers and performers, as well as include a sampling of collections or anthologies, highlights and greatest hits. Information-based CDs should be evaluated on: physical condition, currency of information, use, and duplication of information in another format. Music CDs may be judged by their popularity with library users. Discard them once use decreases. Consider weeding audiobooks that have not circulated within the past two years, especially nonfiction titles that are outdated and would be weeded from the print collection due to copyright date (of the original book) or erroneous information.

CDs are made from the same material used to construct bulletproof windows, polycarbonate plastic. Sources disagree on the actual life span of this medium, and, of course, life span is determined by a number of factors having to do with use and care. Although they will not deteriorate appreciably if stored correctly, circulating CDs sustain damage from mishandling ranging from chips and cracks to deep scratches and warped discs. Light scratches can be polished out, but balance the time spent cleaning and attempting repairs against the replacement cost and continued usefulness of the recording. CDs are also susceptible to temperature extremes, excess humidity, and high intensity UV light. Discs should be regularly checked for signs of damage and discarded. Unabridged audiobooks are expensive; most producers will replace damaged or missing discs at no or low cost.

Book/CD/Tape Sets (Juvenile)

Audiocassettes and compact discs in read-along sets are subject to the same evaluation criteria outlined in the previous sections. Since these items are popular and

incur high usage by children, cassettes, CDs and other components are often not returned with the books. Replacements for the audio portion may be available, but be sure that the accompanying book is also in good condition. If the cassette or CD is not being replaced and the book is in good condition, the book may easily be added to the existing juvenile or picture book collection. Replace companion books when they become worn if the cassette tapes and compact discs are still in good condition.

Video Games

Game playing is extremely popular in many communities and many libraries offer computer or console games, including PlayStation2, Nintendo, Wii, Xbox, etc., for checkout. The major weeding decision factor frequently will have to do with platforms. Once the platform is no longer supported by the hardware companies, interest usually rapidly declines. Of course, when the games are no longer available for purchase, the library's collection may see an increase in use by those who are holding on to the older technology. Look for damaged items or those missing parts and discard them.

While there are few core collection titles, check your collection against the "Top Fifty Gaming Core Collection Titles" from *Young Adult Library Services* online at http://wikis.ala.org/yalsa/index.php/Gaming_Lists_&_Activities#, for a list of popular games that are available for various platforms.

Less Common Nonprint Formats

Computer Software

Because of licensing and format considerations, fewer libraries have a circulating computer software collection. From the standpoint of physical limitations, such as problems caused by exposure to magnetic fields, circulating computer software is not as problematic as it was in the past. The physical limitations of floppy disks are not there with CD-ROMS. However, the software is still subject to damage and there are the labor-intensive chores of checking each returned item for damage. Much of the current software actually involves the purchase of a license and there is nothing, per se, to circulate. Many of the programs require permanent installation on the users' computers or will only run on hard disks. Licensing agreements prohibit multiple installations running at the same time. Be careful about adding outdated software received through donations to the collection. Discard when items are damaged or when they have not circulated within the past year, as this is an indication of lack of need or interest.

Art Prints

Art reproductions are less prevalent now than in the past and many libraries have phased out their collections. Any prints that have not circulated in the past year should be weeded. Prints that are faded, scratched, warped, or otherwise shabby should be weeded, along with those that have worn or separating frames, or mats that are soiled or water stained. In some situations, this may mean eliminating an entire circulating collection. At times, art prints may find new homes in other libraries, or be sold in an annual book sale.

Phonograph Records

Few libraries are purchasing vinyl phonograph records any longer. Indeed, they are nearly impossible to purchase except through second hand markets. In late 2007 Amazon.com launched a separate vinyl record section to handle newly produced recordings. As counter-intuitive as it seems to be, vinyl may make a comeback.[14] Also, some libraries have maintained archival collections or special interest collections due to local demand or for music purists. Easily warped and scratched, records should be discarded if damaged. Except for rare examples of local performers, discard any records that have not circulated within the past two years.

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[14] Van Buskirk, Eliot. "Vinyl May Be Final Nail in CD's Coffin," *Wired* 10/29/07, http://www.wired.com/entertainment/music/commentary/listeningpost/2007/10/listeningpost_1029

CREWing with Computers

Almost all libraries are now fully automated and the online circulation system can provide wonderful reports that are very beneficial in weeding the collection. Lists of library holdings in specific Dewey areas can be produced that show:

- The latest checkout date for items currently being circulated
- The date each item was added to the collection (accession date)
- Previous checkout dates for items not currently circulating
- Other items the library owns with that call number

Depending on your OPAC system, you may be able to determine how many times the item circulated during a specific time period and the copyright dates for each volume in the collection. Running a report of all books in a specific classification area that have copyright dates before a specified year can make it easier to weed parts of the collection that change rapidly (such as computer technology). A 'dusty books' report lets you easily find shelf sitters, although you must still make a determination about whether the item is used in-house. This type of report also allows you to more quickly see if items in a set or series are missing (which might account for lack of use). Books that haven't circulated in some time may also be missing either because they are misshelved (or have fallen behind a shelf) or have been stolen. Information from these automated reports can be especially useful for a 'quick weeding' that catches some of the easy weeding decisions.

If the reports generated by the integrated library system (ILS) are cumbersome or provide information you don't need, check whether you can export the information into a better format. Many systems also allow you to export a file into Excel or another spreadsheet format. For guidance, consult resources like *Analyzing Library Collection Use With Excel* by Tony Greiner and Bob Cooper.

If the system doesn't export to an Excel file, you may also be able to 'cut and paste' information into Excel. This can allow you to customize the report, adding columns to notate that a book is missing, on the shelf, etc. Take the printed report to the shelf and make notes in the appropriate column to provide the information you need for further review. For example, if the book is missing, search further before deciding whether the book is lost forever.

If you are not sure what reports your ILS can produce, or are unclear about the best way to filter the information and format the printout, ask your vendor or another library familiar with your system. Many vendors have tutorials or can field questions by phone or email.

Items That Have _Not_ Circulated in Three Years

Most collections cannot afford to continue housing items that are sitting on the shelf. For most Dewey areas, CREW recommends that you look at any item owned by the library for at least three years but has not circulated in that time period. Begin by printing a report for all these items listed on the computer for a particular Dewey area. If your report function allows it, include the author, title, barcode number, date of publication, last date of circulation, and number of copies for each item on the

printout. Print out only what you can reasonably weed within a four to six week period.

Use these lists to check the shelves, noting those items that are missing and pulling books that are located. Items that have not circulated in three years can then be reviewed for a disposition decision. While probably 80% of the items that have not circulated in three years can be discarded, this is not an automatic process. The librarian must still review the items because some may be used in-house, may be candidates for inclusion in displays that bring the book back into circulation, or would benefit from recataloging to a more appropriate location. Some items may also require replacement by new editions or updated titles.

Missing items, those not located on the shelf but also not checked out, should be searched for at least twice over a period of two to three months. If the item is not located after a reasonable period of time, it can be assumed lost and removed from the library catalog. Occasionally an item will be located on the shelf that is not on the print out. Pull that item to determine whether the item is misidentified, needs a corrected spine label, or has some other problem that needs to be addressed.

Some librarians have suggested that in lean years when budgets are tight, it is possible to extend the time frame a bit in order to leave more books on the shelves. For some areas of the collection, that might be reasonable, although studies have repeatedly shown that an item that hasn't been checked out in the past three years is highly unlikely to be checked out in the next three years. Therefore, to what end is it helpful to leave unwanted, uninteresting, unused items on the shelf simply because the budget is tight?

Items That Have Circulated in Three Years

After completing the first process, use the same system to create a list of all of the items in a Dewey area that **have** circulated in the past three years. Keep in mind that many items that are circulating very nicely may be in poor condition, especially if they have been subject to heavy use. You must go to the shelves to find these shabby items. Additionally, be wary of books that have been in the collection for several years but only circulated once or twice during that time. Your collection could well have books that sat on the shelf until the day before the three-year mark. Although that book will now show up on the list you run of books that have circulated within the past 36 months, use your judgment to determine whether this was a fluke or whether the book is likely to continue to be useful. A book that is in pristine condition after three years may need further evaluation.

Follow the CREWing guidelines until the entire collection has been reviewed and compared with the printouts. While it is possible, of course, to simply go to the shelves and review items that have circulated, using the print outs ensures that you have information, such as last circulation date and number of copies, needed as you make weeding decisions. The process also allows you to easily note where you left off in the process and how long it takes to weed an area. Additionally, by noting on the printout which books are being withdrawn, the physical books can be taken to a disposition area while the printout goes to someone who can remove the entry from the automated catalog system without having to handle the book again.

The CREW Guidelines for Weeding Your Collection

The CREW formulas given here for the various Dewey classes are offered as 'rules of thumb' based on opinions in the professional literature and practical experience.

The formula in each case consists of three parts:

1. The first figure refers to the **years since the book's latest copyright date** (age of material in the book);
2. The second figure refers to the **maximum permissible time without usage** (in terms of years since its last recorded circulation and assuming that the item has been in the library's collection for at least that period of time);
3. The third refers to the presence of various **negative factors**, **called MUSTIE factors**, which will influence the weeding decision.

For example, the formula "8/3/MUSTIE" means: "Consider a book in this class for discard when its latest copyright is more than eight (8) years ago; and/or, when its last circulation or in-house use was more than three (3) years ago; and/or, when it possesses one or more of the MUSTIE factors." Remember that the period of time without use presumes that the book has been in the collection at least that long.

Most formulas include a "3" in the usage category because few libraries can afford to keep items in the collection that have not circulated on been used in-house within a three year period. Exceptions relate mainly to items with local history value. The figure in the age category will vary considerably from subject to subject (and for subcategories within subjects).

Most formulas also include the MUSTIE factors because items that are in poor condition or no longer relevant should not be kept in the collection. If any one of the three parts of the formula is not applicable to a specific subject, the category is filled with an "X". For example, in some categories, like literature or picture books, the copyright date has little influence on the weeding decision.

MUSTIE is an easily remembered acronym for six negative factors that frequently ruin a book's usefulness and make it a prime candidate for weeding:

M	=	**M**isleading (and/or factually inaccurate)
U	=	**U**gly (worn and beyond mending or rebinding)
S	=	**S**uperseded (by a truly new edition or by a much better book on the subject)
T	=	**T**rivial (of no discernible literary or scientific merit; usually of ephemeral interest at some time in the past)
I	=	**I**rrelevant to the needs and interests of your community
E	=	The material or information may be obtained expeditiously **E**lsewhere through interlibrary loan, reciprocal borrowing, or in electronic format.

It is helpful to understand the MUSTIE elements, as these can be the most difficult for library staff to base weeding decisions on.

Misleading refers to information that is factually inaccurate due to new discoveries, revisions in thought, or new information that is now accepted by professionals in the field covered by the subject. Even in fields like physics, that were once thought to be pretty settled, changes occur that radically impact the accuracy and validity of information.

Ugly, like beauty, is often in the eye of the beholder but the physical condition of the collection says a lot about the value we place on our collection. The ugly factor includes most of the elements related to the physical condition of the item—wear, damage, stains, tears, dirt—that make it less attractive to a library patron. Children's books, cookbooks, motor repair manuals, and other 'hands on' materials are especially prone to ugliness. If you don't want to touch the item without wearing gloves, neither will the patron. Or, as one librarian states about the condition of books, "If it's too dirty to read in bed, it's too dirty to be on your shelf.[15]" Also include in this category material that is in perfect condition but covered in dust! If the item has a quarter-inch of dust on it, of course, it also probably hasn't circulated in years. Be very cautious in repairing or rebinding items that are ugly. While a new Mylar jacket or a bit of cleaning may spruce up an item, usually it is not worth spending more than a few minutes repairing an item. Taping a small tear is worth the effort but if there will be more tape than binding after the repair is completed, discard the item. Books that smell are ugly. If the smell can be removed from an otherwise pristine book by closing it up with a bar of deodorant soap for a week, do so and keep it. Otherwise, toss.

Superseded items are those that sit on the shelf right next to newer editions or newer titles that update information. Libraries don't need to keep more than one or two previous editions of almanacs, trivia books (*Guinness Book of World Records*), cookbooks, and other titles that are frequently updated. Be sure to watch for books that are still circulating but include outdated pictures, products, and ingredients. The recipes in the 1975 edition of *The Joy of Cooking* may still be accurate but the photographs and brand names on ingredients have certainly been replaced many times over in later editions.

Triviality implies that the material included in the item was popular for a brief period of time but interest has largely waned. Books are published, often seemingly overnight, when there is a new fad, or when a new celebrity hits the scene. Biographies of pop culture performers, games and consumer products, television shows, diets, and fiction series come and go very quickly. The interest may last a few years but usually fades fast. Many of the books are published in paperback to hit the market while the iron is hot, but when interest cools, library shelves are left full of books that hold little appeal for

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[15] John Sandstrom, El Paso Public Library

anyone. Even if a fad returns, as happened after two decades with the Teenage Mutant Ninja Turtles, the lapse between periods of intense popularity means that the books from the original fad are outdated. Trivial books can also be published immediately following a major event, such as the death of Princess Diana. For topics that have lasting interest, better written books come out a year or so later and the 'instant' books that may trivialize the subject can be discarded.

Irrelevant means that the interests and needs of your community may have changed over time. Perhaps an issue, such as xeriscaping, mass transportation, or solar power, was very popular for a period of time but demand in your community has waned. Frequently, we purchase multiple copies of a book or a wide variety of books on a topic to meet intense local interest, only to have that interest dissipate after a few years. CREW doesn't recommend that you eliminate all items on any topic from a collection; if a particular topic is no longer as relevant to the community as it was at another time, the collection may have too many items just sitting on the shelf. Even though the last use time period may not have passed, these irrelevant items are prime candidates for weeding.

Elsewhere reminds us that no library is an island! We are not alone out there in the vast information wilderness. It can be difficult to let go of items that are still in good condition even though the information covered is trivial or irrelevant. Many librarians hesitate to discard an item because 'someone might need it someday.' True, many of us have had the experience of discarding an item only to have someone request it the next month. However, you can feel more secure about discarding an item if the information contained within is available elsewhere. Interlibrary loan and reciprocal borrowing are ubiquitous. Also, many books are now available online through services like NetLibrary. With the exception of local history and regional documents, almost everything is available someplace else. The Internet has reliable information on many topics; prepare bookmarks and pathfinders for your patrons on frequently used topics such as law or medicine.

CREW Guidelines by Dewey Class

On the following pages are the CREW guidelines arranged by Dewey classifications. *An Overview Chart of the CREW Formulas*, that you may copy and bring to the shelves with you, is included in the Appendix of this manual.

In all cases, weeding decisions are ultimately based on the professional judgments of the library staff responsible for the selection of materials. While the CREW formula may be used as a guide in making weeding decisions, these guidelines can and should be adjusted to meet the needs of the specific library. Feel free to substitute numbers that reflect the library's mission and goals. For example, a library that focuses on popular materials as a major part of its mission may need to discard fiction books and entertainment films after a shorter period without use in order to keep the collection very up-to-date.

Carefully consider all the factors involved in the weeding process, rather than automatically discarding an item with an older copyright date.

000 (Generalities)

This is a very broad category and often requires cross weeding with other Dewey areas. For example, books on running a consulting business may be classified in 001 (knowledge) or in 650 (management).

004 (Computers)

3/X/MUSTIE

Works on computers are seldom useful after three years. Works on hardware and software have an even shorter life span (1-2 years), but may be kept on hand longer if there is strong community demand. Weed based on community interests and prevailing computer applications used locally. Retain manuals for software packages (Microsoft Word, Excel, etc.) at least one release back to accommodate people who didn't update their software immediately.

Series like the 'Dummies' and 'Idiot's Guide' are more useful to general computer users than in-depth tomes. Discard thick books with few illustrations in favor of slimmer volumes with color illustrations and screen images. Programming languages evolve more slowly and may be retained longer, up to ten years, if the language is still used. Consider what courses are offered at local community colleges and universities.

010 (Bibliography)

10/3/MUSTIE

Bibliographies and reader's advisory tools maintain their usefulness as long as the items indexed remain relevant. Many of these items will be in the reference collection, but older editions may be moved to the circulating collection. In the

circulating collection, consider discarding if not used within three years. Discard most bibliographies ten years from the date of copyright or when superseded by a new edition unless the bibliography remains well used either in-house or through circulation.

020 (Library Science)

10/3/MUSTIE *Discard all that do not conform to current, acceptable practice. Also weed previous editions of library science textbooks and titles that deal with obsolete services and material types or outdated library technology.*

030 (General Encyclopedias)

5/X/MUSTIE *The most current encyclopedia is probably the one available online through TexShare or through your state's shared database resources, if applicable. For print encyclopedias, keep the most current one in the reference collection, moving older editions to circulate. Stagger replacement sets over a three to five year period. Older sets may be sold or circulated, but withdraw circulating sets once the copyright is more than eight years old.*

Other 000's

5/X/MUSTIE *Except for trivia books, which may be kept indefinitely or until no longer considered useful or interesting. Books of oddities, controversial knowledge, and the unexplained, including books on UFOS, should be weeded based on interest and MUSTIE factors more than copyright date. Quotation books (080) may be kept as long as they are useful, replacing or adding new titles to maintain currency. Directories for writers (<u>Guide to Literary Agents</u> or <u>The Writer's Market</u>, for example) should be kept no longer than two years as information becomes dated quickly.*

100 (Philosophy and Psychology)

This category focuses on philosophy, psychology, parapsychology, ethics, and logic. Some topics won't date quickly but others, like paranormal phenomena, may be trivial or focus on quickly fading fads.

101 (Philosophy)

15/5/MUSTIE *Most philosophy books do not become outdated and low circulation may be of limited value in weeding decisions. Weed based on interest and use, but maintain a range of titles that explore Western and Asian philosophies. Remove scholarly treatments that have limited use unless they are part of a local*

community college or university curriculum. Weed books that explain philosophies and introductory books that are not included in standard lists after three years without use.

133 (Paranormal Phenomena)

10/3/MUSTIE *Books on the paranormal generally receive high use and should be kept until worn. It will be necessary to replace lost and stolen titles regularly since this category includes the popular topics of witchcraft, fortune telling, dream interpretation, and astrology. High use and wear generally ensures that a fresh supply of books is available.*

150 (Psychology)

10/3/MUSTIE *Other than classics of psychology that may be used in community college and university courses, most titles in this category may be weeded based on popularity and use. Replace worn classics with new editions. Replace works on clinical, comparative, and developmental psychology within five to eight years.*

Review self-help books (158s) and discard titles that are no longer popular or of current interest or that have outdated ideas. Also consider weeding self-help books that have a copyright older than five years. Keep up with television psychology gurus and weed their books when no longer popular or on TV.

160 (Logic) & 170 (Ethics and Morality)

10/3/MUSTIE *Replace worn classics with attractive trade paperback editions. Discard if no longer of interest. Be especially aware of outdated philosophies on ethics and moral values and 'hot button' topics, such as euthanasia, genetic engineering, and sexuality.*

200 (Religion and Mythology)

Spiritual and devotional materials, the Bible and other sacred texts, and introductions to the world's religions are timeless. New interpretations of religion keep patrons reading and current editions of spiritual materials encourage use.

10/3/MUSTIE or
5/3/MUSTIE *Try to have something up-to-date on each religion represented by a church, synagogue, or other assembly in the community or region, as well as something on the well-known modern sects such as Scientology. Include timely and comprehensive information on the six major international religions:*

Buddhism, Christianity, Hinduism, Islam, Judaism, and Taoism.

Use 10/3/MUSTIE except for areas of rapid change, which are 5/3/MUSTIE. This area can be difficult to weed because (a) many of the items are donated and librarians fear criticism from the donors, and (b) religious works SEEM like they should never go out-of-date. However, the language becomes dated, especially in books of sermons and religious thought. Keep classics by famous theologians as long as they are popular and in good condition. Weed superseded editions.

300 (Social Sciences)

This area includes a wide variety of topics, including sociology, folklore, culture, crime, and education. The collection should include information that represents various viewpoints on controversial issues and is current, accurate, and fair.

306 (Culture & Institutions)

5/2/MUSTIE   *This section includes books on marriage, family life, and sexuality. Discard as interest in the author or title wanes. Unless a book has an historical approach, the topic is usually outdated within five years.*

310 (General Statistics)

2/X/MUSTIE   *Almanacs and statistical handbooks are seldom of much use after two years; keep only the current volume and one or two previous editions except for historical handbooks. Keep the most current copy in the reference collection, transferring superseded copies to the circulating collection. **All** public libraries in Texas should have at least one general almanac and the <u>Texas Almanac</u>. Current census information is available online but print on demand copies and print copies of related demographic information should be discarded when new decennial census data is available. It's tempting to keep statistical data that is in electronic format, such as compact disk, but unless historical use is heavy, discard when new information is available.*

320 (Political Science)

5/3/MUSTIE   *For books on current political topics, weed within five years of publication.*

General guides to the political process and the electoral system may be kept longer and are judged more on the basis of use

rather than copyright date. Retain titles on the US Constitution and the Bill of Rights regardless of circulation as these may be used more in-house. Replace as needed based on MUSTIE factors.

Books of local political history may be kept indefinitely.

Be aware of changes in political rhetoric and discard books with outdated ideas. Be aware also of how books in this classification area interrelate with titles in other areas, such as history. Discard books that compare democracy with political systems in countries that no longer exist (ex. USSR).

Weed books that focus on past presidential elections when they deal with issues that are no longer relevant to current campaigns.

323 (Immigration & Citizenship)

5/3/MUSTIE — *Immigration issues change although the collection may also include books that look at historical elements. Remember that study guides for citizenship and ESL tests are available through the database, LearningExpress; in Texas check with your Library System to see if you have access.*

Update items about how to obtain citizenship and study guides for citizenship tests as new editions become available. Retain histories of immigration to the US as long as interest warrants but be cautious about discarding primary source materials and guides that may be useful for genealogical research.

Weed biased or unbalanced and inflammatory items.

330 (Economics)

3/3/MUSTIE — *Currency of information is the most critical factor in this area; patrons want to know what is happening today when it comes to finances. Money management guides and books on personal finance and real estate investing date quickly. Books on tax return preparation and estate planning must be current to account for changes in laws. Books on careers and job hunting should be updated frequently to ensure that requirements are current, although salary information will most likely always be outdated. Weed career guides with gender, racial, or ethnic bias. Even careers that seem fairly stable have experienced significant changes in the past decade.*

Update items available in revised editions. Be aware of major changes in state and federal statutes and regulations, or changes in the general climate for a particular type of

investment. Classic books by well-known authors who are no longer writing, especially those that deal with principles and philosophies of economics, may be kept as long as interest exists or until MUSTIE factors prevail.

Weed books that offer advice on 'how to survive' past economic depressions or how to prosper from 'good times' that occurred in the past. Retain histories that explore and analyze important periods, such as the Great Depression, as long as interest warrants.

340 (Law)

5/2/MUSTIE
*Replace when more current material becomes available. **Never keep superseded editions, even for heavily used topics like divorce or bankruptcy. Keep only the current edition or the edition approved for use in your community of the Uniform Building Code and similar code books for specific areas of construction.***

General guides on finding and working with an attorney or the basics of our legal system may be retained based on use. Study guides for law school should not be kept longer than 3 years; check with publishers to ensure that major changes in the test have not occurred.

Retain books that examine the history of major legal cases (Brown vs. Topeka) as long as interest exists or until MUSTIE factors prevail.

Remember that most government agencies now post the most current legal information, laws, and ordinances on the Internet.

350 (Public Administration)

5/3/MUSTIE
This section includes information about the administration of government, including civil service employment and the military. Standard books, like The US Government Manual, should be replaced as new editions become available. Discard older editions of reference type guides if they are available online unless intense local interest warrants keeping print copies.

Keep up-to-date; replace when state and federal administrations change or constitutional reforms occur. Histories of government agencies and the military may be kept as long as interest remains. Also retain classics (The Art of War by Sun Tzu), replacing when MUSTIE.

Test guides for civil service positions and entrance into the military should be discarded after 3 years or when MUSTIE factors apply.

360 (Social Services)

5/3/MUSTIE

This broad category includes drug and alcohol education, social problems and issues, true crime and criminology, and other social welfare issues.

Titles that deal with popular social issues should be weeded based on age (copyright) and popularity. Watch for social welfare topics that are changing rapidly, such as socialized medicine and end-of-life decisions, environmental issues, and dealing with addictions. Handbooks and guides that deal with interactions with people with disabilities, surviving cancer and other major illnesses, and long-term care needs should be scrutinized for outdated terminology and descriptors, as well as to ensure that treatment and long-term care options are current. Discard memoirs when interest in the person or subject wanes.

Copyright is not relevant for true crime. Classic cases, like <u>In Cold Blood</u>, should be replaced when MUSTIE factors are present. Cases with ephemeral interest can be weeded when circulation decreases significantly. Forensic sciences and criminology should be updated as techniques change or are improved.

370 (Education)

10/3/MUSTIE

Books in this section deal with formal and informal education at all levels, including homeschooling, ESL, and lifelong learning. Remember that current study guides and practice tests are readily available through the Learning Express database. In Texas, check with your Library System to see if you have access.

*Keep historical materials **only if used**. Discard all outdated theories; check with a teacher or principal if in doubt.*

Discard books about getting an education—college guides and entrance examination books—after five years. Most of the information will be outdated. Books about the education system in general and societal issues related to illiteracy and lack of education should be discarded when interest in the writer's theories wane.

Replace books on subject-specific curricula as those fields change. Visual appeal is the primary factor for books that offer ideas for lesson plans and activities.

390 (Customs, Etiquette & Folklore)

390–394 (Costumes, Customs, Holidays)

10/3/MUSTIE *Books of costumes and fashion history won't go out of date but discard books about specific designers or styles of dress as interest fades.*

Books about celebrations of life's milestones, wedding planning, and holiday celebrations should be discarded as fashions and customs change. Discard books that lack clear color pictures.

Holiday-specific books may only circulate once or twice a year. Discard books that are MUSTIE or that reflect gender, family, ethnic, or racial bias. Discard books by celebrities after their popularity has waned.

395 (Etiquette)

5/3/MUSTIE *Basic titles can be kept until new editions are available. Discard books for specific situations, such as global etiquette, teen manners, and such, as the illustrations become dated or acceptable practices change.*

398 (Folklore)

X/3/MUSTIE *Keep standard works of folklore indefinitely; weed according to use and MUSTIE factors. Folktales never go out of date, so copyright is not a factor. Weed based on the quality of the retelling, especially if racial or ethnic bias is present. Watch for collections that have become MUSTIE or that are not circulating. Replace standard collections with new, attractive editions. Most picture book versions of individual folktales will be classified in the children's collection.*

400 (Language)

10/3/MUSTIE *Discard old-fashioned and unsightly textbooks and outdated books of grammar. Books that explore the history of languages and word origins should be discarded when MUSTIE.*

Replace stock dictionaries for major foreign languages (e.g., French, Spanish, Italian, German), and any other languages being studied or spoken in the community on a rotating basis to ensure currency.

English language dictionaries should be replaced five years after copyright except for unabridged dictionaries. Update those when new editions are published.

500 (Natural Sciences)

This Dewey classification includes science fair projects and experiments, books on all of the areas of natural science, and books on mathematics. Some areas change rapidly, while others are more static. Recent circulation will not be a good determining factor in high interest areas, such as dinosaurs or science experiments; however, lack of circulation is a good indicator that the book is no longer useful.

5/3/MUSTIE — *Carefully evaluate anything over five years old. Pay particular attention to the physics, environment, and astronomy sections. Keep basic works of significant historical or literary value, such as Charles Darwin's classic <u>Origin of Species</u>, or Michael Faraday's <u>Chemical History of a Candle</u>. Replace worn copies with new editions. Watch for multi-volume sets; if the titles are not indexed individually it may be necessary to weed the entire set, especially if the set is cataloged as a single entry.*

507 (Science Experiments)

10/3/MUSTIE — *Many of the science experiment books may be in the children's collection but collections of experiments for teachers will be in the general collection. While many experiments are considered to be 'classics,' examine books for outdated and unsafe practices.*

510 (Mathematics)

10/3/MUSTIE — *Math does not change as rapidly as other subjects, so weed primarily on MUSTIE factors and lack of use.*

Replace older materials on algebra, geometry, trigonometry, and calculus with revised editions. Discard books that focus on outdated teaching methods and techniques, such as books that feature 'new math' or that focus on slide rules as the primary method for making calculations. Also discard past fads.

Discard workbooks and test study guides that have been written in or that are MUSTIE. Remember that many of these tests are provided through the LearningExpress database. In Texas, check with your Library System to see if you have access.

520 (Space and Astronomy)

5/3/MUSTIE   *Major changes have occurred, so weed titles that include Pluto as a planet or that don't include information on the space station and Mars expeditions. Stargazing books may be retained longer but should be attractive and mention relevant technology.*

550 (Earth Sciences)

X/3/MUSTIE   *This section includes earthquakes, volcanoes, and other geological topics. Weed books that do not reflect current theories and science on geological activities. Also weed books that have outdated information on major disasters, such as the eruption of Mount St. Helens and replace with recent books that examine the long-term aftermath.*

Geology books on specific regions, especially Texas, may be kept indefinitely, or until superseded by newer editions.

All general materials should be replaced when new developments occur in the field (e.g., theories about continental drift and plate tectonics have been revised in recent years).

Field guides for amateur fossil, gem, and rock hunters can be kept for up to 10 years if physical condition allows or until circulation drops, unless the area described has changed dramatically through man-made activities or natural events. Replace with up-to-date attractive titles that include clear photographs.

Weed books on meteorology that do not reflect current weather technology or that include historical weather charts that are more than ten years out of date.

560 (Paleontology)

5/2/MUSTIE   *Current research has changed the previously more static world of fossils. Discard materials that are not being used, as this is one indicator that the information may be out of date. The popularity of topics like dinosaurs may mean that even outdated books are checked out. Discard most books that lack color illustrations.*

Field guides may be kept longer, especially those that cover local regions and the Southwest. Discard older editions as newer ones are received.

570 (Life Sciences)

7/3/MUSTIE

Retain indefinitely classics in the field (Darwin's <u>Origin of Species</u>) replacing with updated editions as wear warrants.

Use 5/2/MUSTIE for books on genetics, genetic engineering, human biology, and evolution due to rapid changes in scientific practices.

Weed titles on ecology that appear dated, even if the information is still accurate. Watch for books that are sensational in tone.

580 (Botanical Sciences)

10/3/MUSTIE

Botany changes less rapidly than some other areas of science. Weed books that lack color illustrations or that appear dated. Be aware of field guides that promote edible or medicinal plants and herbs to ensure that they meet safety guidelines.

600 (Technology, Applied Sciences)

610 (Medicine & Health)

5/3/MUSTIE

Weed ruthlessly when it comes to current medical practices. Patrons rely on up-to-date information and outdated information can be dangerous. Keep only the current year plus the previous year (one reference, one circulating) of <u>Physician's Desk Reference</u> (PDR) and other prescription and over-the-counter drug directories, replacing when new editions become available. Do not keep drug guides that are more than three years old regardless.

Regularly review books on fast changing topics, such as AIDS, fertility, cancer, and genetics to ensure that the information is up-to-date and accurate.

Anatomy and Physiology do not change as rapidly as other topics.

Weed unattractive titles, especially those that lack good illustrations. Retain the current edition of classics, such as <u>Gray's Anatomy</u> in the circulating collection, although historical facsimile editions may be retained in reference indefinitely.

629 (Automobile Repair)

X/2/MUSTIE

Automotive repair manuals don't go out of date, so weed primarily on use and condition. If a repair manual has not circulated in two years, it is no longer of use in your community. They get dirty quickly; discard when they are

beyond hope or are falling apart. Be especially ruthless in weeding if your library has access to online databases, such as Chiltonlibrary.com, that provide repair instructions and schematics.

630 (Agriculture)

5/3/MUSTIE   *Keep up-to-date; be sure to collect information on the newest techniques and hybrids if you serve farmers or ranchers. Books with current information will probably include discussion of biotechnology and genetic modification. Regardless of use, discard books with outdated and dangerous ideas, such as pest control using DDT.*

635 (Horticulture)

10/3/MUSTIE   *General gardening books may be useful for a long time, so circulation is the main weeding criteria. Books about propagation of specific flowers or plants are considered outdated after 10 years. Books that focus on organic gardening and the use of pesticides and chemicals should be reviewed for accuracy and currency of information after five years. Discard books with black-and-white photographs in favor of more colorful illustrations.*

636 (Pets)

5/2/MUSTIE   *Histories of specific breeds don't necessarily go out of date but the collection should include books with current photographs and recent 'best of show' winners. Discard titles for once-trendy breeds that are no longer popular in your community. Veterinary medicine and animal care has changed significantly in the past ten years. Discard titles that encourage outdated and cruel methods for obedience training and behavior modification.*

640 (Home Economics)

5/3/MUSTIE   *Be ruthless in weeding old cookbooks. Physical condition is the main criteria as cookbooks that are well used become grungy quickly. Also weed books by celebrity chefs and television cooks once their popularity has waned. Weed cookbooks that are based on popular diets (e.g., The South Beach Diet Quick and Easy Cookbook) once the diet is no longer popular. Replace classic cookbooks, such as The Betty Crocker Cookbook, with new editions when available.*

Books on nutrition and food preparation should reflect current scientific practice. Any titles that mention the four basic food

groups should be replaced with titles that discuss the food pyramid.

Discard books on sewing when the styles reflected in the illustrations and projects are dated.

649 (Child Rearing)

5/3/MUSTIE
Keep abreast of changing trends and new theories; replace standards like Dr. Spock's Baby & Child Care when new editions are available. Weed books that reflect outdated ideas about gender roles in childrearing.

670 (Manufacturing)

10/3/MUSTIE
Weed based primarily on use and condition. Keep repair manuals for appliances indefinitely unless the technology is so obsolete that no one in the community is likely to repair the equipment. Some resources may contain information of historical value. Keep works on tools, farm implements, etc. that are still used in your community. Be wary of older books on desktop publishing and printing technology.

700 (The Arts)

This Dewey area includes a wide range of disciplines, including topics that change rapidly along with historical treatments that remain useful for long periods of time. Often books are oversized and may be used primarily in the library.

709 (Art History)

X/3/MUSTIE
Art histories often cover major periods and schools or specific regions of the world. While information may not become dated, watch for cultural, racial, and gender biases. Discard scholarly works that are not useful to your community in favor of materials for students and general readers. Discard books that don't include good reproductions of major works of art.

720 (Architecture)

X/3/MUSTIE
Histories of architecture may include general surveys or specific time periods and regions. Historical treatments do not date quickly.

Books featuring house designs and plans should reflect current building methodologies and current tastes in design. Generally discard home design books after ten years regardless of circulation. Be aware of changes in building codes. Evaluate books on trends (such as feng shui), that feature celebrity designers (Martha Stewart's New Old House), or that are

*based on television shows (*This Old House*) when interest has waned.*

737 (Numismatics) 769 (Stamp collecting)

5/3/MUSTIE

Keep stamp and coin catalogues up-to-date, replacing books that provide market valuations and price guides after 5 years. Keep a current edition and one previous edition of price guides that are updated yearly. Consider keeping the current edition of books like The Official Blackbook Price Guide to US Postage Stamps in reference, circulating the older edition if interest is high. Historical treatments of ancient, foreign, and commemorative coins and stamps may be kept indefinitely as long as interest is maintained. Many books on these topics will be used in-house.

740 (Drawing & Decorative Arts)

X/3/MUSTIE

Books that feature drawing styles and instruction should be weeded based on use and appeal. Retain basic technique books if well illustrated; replace worn and dated materials. Replace books on cartooning and compilations of popular comic strips (Peanuts, Mutts) as they become worn unless interest in the particular cartoon characters has waned. Consider reclassifying graphic novels not based on comic strips from 741 to a unique classification that gathers them together. Although Dewey indicates that graphic novels be placed in 741.5, many patrons prefer that they be shelved in a separate location.

Keep all materials on the history of interior design that are in acceptable condition. Discard books that feature general home decorating ideas after 5 years in favor of books that review established and distinct decorating styles (Southwestern, Caribbean). Discard books that feature outdated colors and patterns.

Keep books on antiques and collectibles, especially identification and price guides, until new editions are available. Discard books that don't have good photographs or that are simply lists of auction prices without good descriptions.

Skills required for most crafts don't change over time. Discard craft books based on use but watch for outdated styles and materials. Discard books on crafts that are no longer popular (macramé) or that feature gender bias.

770 (Photography)

5/3/MUSTIE — *Check closely for outdated techniques, and especially outdated equipment; if in doubt, check with local photography club or buffs. Works about specific photographers, especially historical figures, may be kept as long as there is interest.*

791 (Public Performance)

10/2/MUSTIE — *This section can include memoirs of actors and performers writing about their craft and overviews or histories of film genres (e.g., horror film, best western movies). It also includes books of trivia based on popular movies and television shows. Weed based on interest and condition.*

793-796 (Games and Sports)

10/3/MUSTIE — *Discard and replace as rules and interests change. Watch for gender and racial bias in sports and athletics. Discard books that have outdated statistics.*

Handbooks on popular electronic games may be difficult to replace; retain as long as the games are played in your community.

800 (Literature)

In most public libraries, general (or popular) fiction is cataloged in a separate area and the 800s are reserved for collections of poetry and prose, literary criticism, and, frequently, works of literature by non-Western authors. See the Fiction section (below) for works of popular fiction.

Copyright is not relevant for literature but older editions that are MUSTIE rarely circulate.

X/3/MUSTIE — *Keep basic materials, especially criticism of classic writers. Discard any works of minor writers no longer read in the local schools, unless there is an established demand among the non-student population. Discard older editions of classics that have unappealing covers and yellowing pages, replacing with newer copies or paperback editions. Remember that classics that are being read won't be weeded—don't keep classics just because they are classics!*

Check with local schools and community colleges for assignments or reading lists and check discards against these lists.

Discard collections of poetry and short stories that are not being used. Series that collect the 'best' short stories of the

year are rarely read after five years. Also consider weeding collections that are not indexed.

Discard books of wit and humor that are not circulating. Watch for collections that feature gender or nationality bias and outdated interests and sensitivities.

900 (History and Geography)

910 (Geography and Travel)

3/2/MUSTIE

Guidebooks (such as the Fodor series or Mobil travel guides) are outdated within a year or two. Keep no longer than three years. Historical travel guides, especially those that deal with local attractions (books about Route 66, for example), may be kept longer for archival purposes if interest exists.

Watch for changes in country names and for political changes that result in new or reformed countries. (Weed books that still refer to the USSR rather than individual countries, for example.) Atlases should be current, except for historical atlases, and replaced after major changes in political divisions occur.

5/2/MUSTIE

Weed personal travel narratives on use and interest, unless of high literary or historical value.

930-999 (History)

10/3/MUSTIE

Consider demand, accuracy of facts, and fairness of interpretation when reviewing histories. Carefully review histories of countries where major political and geographical changes have occurred. Discard older histories that don't reflect the unification of Germany or Vietnam or the break-up of the Soviet Union, for example.

Consider discarding personal narratives and war memoirs of World War II, the Korean Conflict, and the Vietnam War in favor of broader histories of these conflicts, unless the author is a local person, or the book is cited in a bibliography as having an outstanding style or insight.

Discard dated viewpoints (e.g., the McCarthy Era "World Communist Conspiracy" theory of modern history).

Retain books that collect primary documents or include archival photographs unless the reproductions are of poor quality.

B or 92 and 920 (Biography)

X/3/MUSTIE   *Unless the person treated is of permanent interest or importance, such as a U.S. President, discard a biography as soon as demand lessens. Replace biographies of people of ongoing interest with newer titles, at least once a decade, as interpretation of their lives and public perception of their impact will change over time. New information about their activities and accomplishments may be discovered.*

Ruthlessly weed ghost written biographies of celebrities and biographies that were published immediately following the person's death or a major scandal. Poor quality biographies of major figures should be replaced with better ones, when available.

Biographies of outstanding literary value, such as Boswell's Life of Johnson, *can be kept until worn.*

Collective biographies usually focus on people from similar disciplines, racial, ethnic, or cultural groups, or geographic areas. Watch for outdated interests and collections that feature gender or race bias.

F (Fiction)

X/2/MUSTIE   *For most public libraries, circulation is the primary factor for weeding fiction. Discard works no longer in demand, especially second and third copies of past bestsellers. Retain works that are in demand and/or of high literary merit, but replace worn copies with new editions. Discard lesser works by classic authors if they are not circulating. Consider discarding all titles in a series if you are not able or willing to replace missing titles, especially if the books do not stand alone.*

Graphic Novels

X/1/MUSTIE   *Graphic novels are a format, not a genre, and can be classified in the adult, young adult, or children's collection depending on content appropriateness. Most are paperbacks but more and more are being released in hardcover editions. Because of their popularity, consider weeding any title that hasn't circulated in the past year. The exception would be classics or milestone titles such as* Maus: A Survivor's Tale *that might not circulate as heavily but will be discovered by serious graphic novel readers. Popularity is a major factor in selecting graphic novels and shelf-sitters make it harder for readers to find the graphic novels they are seeking.*

Condition is also a big factor in weeding. Weed titles that are falling apart, have missing pages, etc., but also consider weeding later titles in a series if you cannot or don't want to replace earlier missing titles.

Periodicals (Also Newspapers)

3/X/X

Libraries used to bind most periodicals but the availability of online databases has made this an unnecessary and, in most cases, a wasteful expense. Keep in mind that most patrons rarely refer to a magazine that is more than three years old. Only bind quality periodicals that are in constant use for research (e.g., National Geographic) and that are unavailable in online databases.

Most popular newspapers are now available online. For the local newspaper, see section, "Local History."

Government Documents

3/2/X

The federal depository library program is currently being studied and may likely change in the future. Already many government documents that were previously available in print format are only available electronically. Libraries that serve as official depositories of federal or state documents are required by law to follow established procedures governing weeding outlined in the agreement that established the depository library.

For non-depository libraries, documents should be discarded when superseded. Also discard documents that are not being used and are available in electronic format on the Internet. If a government document is cataloged in the general collection, weed according to the guidelines for that Dewey area. Refer to <u>The Federal Depository Library Handbook</u>*, at* <u>http://www.fdlp.gov/handbook/index.html</u>*, for its suggested core collection by library type. This document indicates whether basic titles are available in print or electronic format.*

Nonprint (Audiovisual) Media

Depending on your collection, nonprint can include a wide variety of formats and the formats are rapidly changing. Except for items of local and regional history and archival materials, most nonprint material can be evaluated on the WORST formula. Current use and condition are more important than copyright date or production date. Although the CREW formula includes copyright criteria, rely more on

condition and circulation. Consider weeding any nonprint item that doesn't circulate several times a year.

WORST   ***W**orn out, **O**ut of date, **R**arely used, **S**upplied elsewhere (available through ILL), or **T**rivial and faddish. Monitor statistics of use for these materials and view/ listen to them periodically to determine their condition. See the section, "CREWing Nonprint Media" for more detail on individual formats.*

Film Formats

(DVD, videocassette, Blu-Ray)

2/1/WORST   *Videocassettes are disappearing from library collections as suppliers have mostly discontinued the format. If local interest exists, the videocassette collection may remain vital through donations. Examine closely after approximately 150 to 200 circulations. Weed videocassettes that are not circulating at least once a year. Replace worn copies of popular titles with DVD, if possible. Relocate children's videos for use in children's programs only if the library has public performance rights.*

DVDs may or may not hold up to wear better than videocassettes. Check for scratches and discard if polishing is unlikely to repair the damage. Don't spend a lot of time trying to fix problems! It is generally not worth the time and effort and it takes special equipment to do a good job.

Be wary of DVDs that were not produced for use in the United States. Few patrons have players that will play DVDs created for other regions of the world.

New formats are developing and as of 2008 Blu-Ray appears to be the winner in the current high definition optical disc format wars. Eventually this format will replace DVDs in library collections although players are backwards compatible so patrons with Blu-Ray players can also use DVDs. Weed based on condition and popularity.

Audio Formats

(Music, audiobooks)

X/2/X   *Music and audiobooks are available in several formats, including vinyl, audiocassette, and compact disc or MP3 disc. Copyright date has little impact on weeding decisions.*

Few libraries currently maintain collections of vinyl recordings. Most vinyl in public libraries is for musical

recordings. If your collection includes them, weed based on use and availability in other formats. Discard when scratched or when the sleeve becomes tattered.

Weed music on audiocassette or compact disc formats based on condition and recent circulations. Any item that has not circulated within the past two years is most likely 'dead.' Do not spend time trying to repair audiocassettes. Compact discs are pretty durable, although they are not as indestructible as originally believed. It's probably a good idea to discard any compact disc that is more than 20 years old. If a compact disc can't be cleaned easily and quickly, then discard. Most cleaning equipment can only remove light scratches.

Audiobooks are available in audiocassettes and compact disc sets, although many libraries are circumventing the format decisions by subscribing to downloadable services. Weed based on circulation and condition. Discard sets if one or more component is missing unless the producer can supply a replacement (many do this free or for a small fee). It is generally not worth the time to try and repair audiocassettes; you will have limited success cleaning more than minor scratches out of compact discs.

Local History

X/X/X

Your library is also the logical archives of the community, and, in many cases, of the county. Retain <u>all</u> books on the history and geography of the city and county unless worn and not repairable. Retain local newspapers for up to five years if they are not available electronically or on microfilm. If the library is the only repository for the local newspaper, consider microfilming past editions. Brittle newspaper or fragments have little value in research. Keep local city directories. Keep <u>most</u> books by local authors (even if of minimal literary value) and genealogies of important local families.

CREW Guidelines for the Children's Collection

Most children's books can be evaluated in part on the guidelines provided above. However, additional considerations must be taken into account and the CREW formula may be different in some cases. Children rarely know what is on the *New York Times* bestseller list and they don't read reviews. Many older titles remain popular through many generations, and of course, parents and caregivers may seek out books that they remember fondly from their own childhood. While we all judge books by their covers, children's books may become MUSTIE more quickly due to heavy use. Unless forced to read a book for a school assignment, most children won't pick up books that look old and stodgy. Teens in particular prefer paperback formats for leisure reading. In addition to the considerations provided above, use the following guidelines when weeding the children's collection.

E (Easy Readers/Picture Books)

X/2/MUSTIE

Evaluate all materials <u>carefully</u> using MUSTIE as a guide. Replace popular titles that are torn and worn or that have been 'loved' too much.

Weed any book that has not circulated in the past two years. Picture books are so heavily used that every title should go out at least once in a two-year period.

Discard any books that are not suitable for library use, including those with inferior bindings. Replace as soon as possible books that have been rebound and don't have attractive covers.

Books that feature popular and commercial characters should be weeded when interest has faded or the television show is no longer shown.

Weed books that reflect racial and gender bias. Consider moving classics that may be used by children's literature classes to the adult 800s.

Use resources like <u>A to Zoo</u> by Carolyn Lima to determine the likelihood of continued usefulness to the collection.

JF (Juvenile Fiction)

X/2/MUSTIE

Evaluate carefully for MUSTIE factors. Copyright is less important than use, but consider weeding anything that hasn't circulated in the past two years.

Weed based primarily on current interest except award books and those on school reading lists (e.g., Newbery Award, Coretta Scott King Award, Bluebonnet lists). Weed older

award winners if they have not circulated in three years, or replace with a newer hardcover or paperback edition with contemporary cover art.

Evaluate closely for outdated styles, artwork, and mores, or biased viewpoints. Discard if format and reading level are not appropriate to the current interest level of the book. Discard topical fiction on dated subjects and cultural fads.

Discard abridged or simplified classics in favor of the original unless the particular abridgement has been very favorably reviewed.

YA (Young Adult) Fiction

3/2/MUSTIE

Keep this section very current. Any item that has not circulated within two years should be considered 'dead' and removed (and anything that hasn't circulated within the past year is suspect and should be evaluated for promotion, relocation, or discard).

Discard YA fiction with outdated illustrations, story lines, or subjects. Classics (such as The Pigman *by Paul Zindel or* The Chocolate War *by Robert Cormier) are not subject to the copyright guideline but should be replaced with newer paperback editions. Check for updated editions of popular classics like* Forever *by Judy Blume that have had terminology and situations updated for contemporary readers. Discard any YA fiction that has been rebound and lacks attractive cover art.*

J and YA Nonfiction

Use adult criteria for each Dewey category, but look especially for inaccuracy and triviality—common faults of over-simplified children's nonfiction. Discard titles that are outdated regardless of condition. Many children's books are purchased in library editions that never fall apart! Do not retain books that have erroneous and dangerous information simply because the book is still in great shape.

See the chapter, CREWing Children's Materials *for additional general criteria.*

What to do with Weeded Books: Types of Disposal

Every library will have its own method for handling books pulled for discard. Some use a printout from the online catalog to record disposition decisions. Others use a preprinted disposal slip that allows other staff to know how to process the discard.

The CREW method is well suited to using a simple, preprinted disposal slip (placed in each book when it is pulled) that indicates whether the book is to be sold, donated, destroyed, mended, transferred, rebound, or replaced. Mend sparingly! Mending should not require longer than fifteen minutes nor be so extensive as to ruin the materials' appearance. Any item that cannot be mended within this time frame should be disposed of and replaced, if use warrants, with a newer copy or edition.

Bind sparingly! Before sending a book to a bindery, determine whether the continued value and use in the collection warrants the time and expenses to bind. Compare the cost of rebinding with the cost of a new copy or edition. Often, a new copy is almost as inexpensive and is more appealing; a rebound volume is not as attractive as a new book. For out-of-print titles and titles of important local interest, rebinding is the best option. You may wish to remove and save the plastic covered dust jacket and/or barcode label from the book before sending it to the bindery, since they might possibly be reused on the rebound volume.

There are five basic ways to dispose of print or nonprint materials:

Sell It: to the public, either at a large annual sale or from a continuous sale rack; or to a used book dealer or pulp dealer, usually in large lots, or through online sales.

Donate It: donate books to a hospital, nursing home, adult or juvenile correctional facility, charitable institution, school district, or to a small library struggling toward system membership.

Trade It: with another library, or with a used book dealer, for a book your library can use.

Recycle It: by using a local contractor, perhaps in cooperation with local government agencies.

Destroy It: by burning in an incinerator or by tossing it into the trash. If the latter method is used, be sure the books won't be seen by someone passing by. Citizens might misunderstand the reasons for destroying 'valuable' books.

Each method of disposal has its advantages and drawbacks, and its own preconditions:

SELLING promotes good public relations and is potentially profitable if the materials have some residual value, and if selling is done with the clear understanding that the items may contain dated information. Mark all discards clearly to avoid donations from well-intentioned, but ill-informed, patrons who return the books to your library. Books that cannot be sold should be recycled, destroyed or sold with other hopeless cases to a pulp dealer (if one is within driving distance).

Keep in mind that your governing authority (city, county, district) probably has rules about selling items that were purchased with taxpayer funds or that were donated to the collection. Be sure that you follow the rules! In some cases, it is a matter of wording the transaction properly to remain within the rules. For example, it may be okay to sell 'surplus' materials or the 'asset' may need to be transferred to a group, such as the Friends of the Library, who can then handle the sale of weeded items.

Most Friends groups hold annual or semi-annual sales that can be great community events. Others may instead, or in addition, hold ongoing sales. Most books are priced at fifty cents or a dollar, although special, collectible books may be individually priced. The idea is to generate as much money as possible without spending too much time sorting and pricing. Book sales also promote goodwill and generate publicity for the library.

Many Friends groups are beginning to use online sellers to make money for the library or donate unsellable books to organizations. No program is perfect, and none is endorsed by the writer of this manual or the Texas State Library and Archives Commission. Research for yourself options offered by each company or program before making a decision. Various online sellers such as Better World Books, http://www.betterworldbooks.com/, Cash 4 Books, http://www.cash4books.net/, and Blogistics, http://www.blogistics.com/, purchase used books directly from libraries. Each company has specific requirements related to condition (ex-library books may not be saleable but you may make money on donations that can't be added to the collection). Friends of Libraries USA (FOLUSA) offers some tips on online selling on their Web site, http://www.folusa.org/resources/selling-books-online.php.

Some governing agencies require, or offer as an option, that old books be sold as surplus through the agency's purchasing department, although rarely does the library benefit from any proceeds of the sale.

As a goodwill gesture, consider giving away books that don't sell at the book sale. If local rules permit, allow interested people to cart off the excess inventory, saving the library the expense of hauling the books to the dump. This also allows the library to avoid public relations issues that may arise if the community perceives the library as 'throwing away perfectly good books.'

DONATING is not a profitable method, but promotes good public relations if only very good discards are disposed of in this way. Giving away junk does not promote good public relations, nor does it help the recipients. A childcare center, for example, will remember kindly your donation of picture books even if the covers are shabby. You may gain a regular customer for your prettier new picture books and a dozen regular patrons for your preschool story hour by sincerely considering the wants and needs of the recipient of your discards. For good quality books that are too technical for your collection, check with local universities to see if they can use the items. Even books that include outdated

information, stereotypes, and such may be useful for a museum or history center that focuses on the population or topic.

If a book depository or branch is planned, you might store discarded second and third copies for such a purpose if they are in good condition and are likely to remain viable in a collection. Consider donating duplicates that are in good condition to a local hospital, literacy program, nursing home, or an adult or juvenile correctional facility (especially paperbacks and large type books). Do not donate books that are in poor condition or that contain dangerously outdated information! You are simply passing your junk on to someone else!

Be wary of patrons who suggest that the library donate used books to projects in other countries or outside your area. Shipping books to Africa is very costly and it does little to help developing areas if what is being shipped is old, in poor condition, and outdated. Some libraries are willing to donate materials to groups that work with such projects as they know what is useful and what is junk. See ALA's Fact Sheet 12, "Sending Books to Needy Libraries: Book Donation Programs" available online at http://www.ala.org/ala/aboutala/hqops/library/libraryfactsheet/alalibraryfactsheet12.cfm for information on organizations that do want books for specific projects.

TRADING your 'best' discards is both excellent public relations and a shrewd financial move. Trading works with only two specific classes of discard: the high quality (or, at least, well-reviewed) item that is nonetheless of no interest to your community (e.g., a shelf sitter in Del Rio might be dynamite in Pampa, and vice versa); or the occasional donated duplicate of a good book of less than two-copy demand. Inquiries about trades can be made over the phone, by email, by letter, or as part of the business of the Texas Library Association annual conference or regional system meetings. If you are interested in trading, check out the Duplicates Exchange Union, http://www.ala.org/ala/mgrps/divs/alcts/mgrps/ecoms/duplicatesexch/duplicatesexchange.cfm. Membership is free and open to libraries of all types. Members exchange lists of available materials (as well as want lists) electronically. The requesting library pays for mailing items if the cost is above a set amount. Be sure that local ordinances allow the trading of assets that have been purchased with taxpayer funds.

RECYCLING services are now widely available and many communities encourage 'going green.' Recycling not only saves resources and improves the environment; it also helps control the rising costs of new books by holding down paper prices. Many community recycling programs accept the 'slick' paper that most magazines and vendor catalogs are printed on, as well as newsprint, making it easy to recycle discarded magazines and newspapers. Unfortunately, it is very difficult to recycle books. Paperbacks can often be recycled, but hardbacks are usually only recyclable if the covers are removed, a job that is very time consuming. Check with local recycling companies to ensure that you are not simply passing along 'garbage' that will either foul the recycling process or need to be hauled to the dump by someone else.

Children's books that are worn or damaged beyond repair may also be 'recycled' by laminating the illustrations and putting them on craft sticks to make puppets for library storytime, local child care centers, or teachers, or for creating flannelboard versions of popular stories. Many crafters have begun to 'recycle' books into works of art such as hollowed out 'book boxes' to hide valuables or store items, or turning them into purses and other items. See the Altered Book website, http://www.alteredbookartists.com/, for an amazing assortment of art made from old books.

DESTRUCTION should be reserved for materials in the worst physical condition, the absolutely hopeless cases, and then only as a last resort if the books cannot be recycled or sold for pulp. The advantage of this method is that it requires minimal time and effort. The major drawback is that the library derives no benefits, in money or public relations, from the discarded materials. Besides contributing to the already overflowing landfills, this method of disposal is likeliest to cause a 'weeding controversy,' since many people are shocked by the 'waste' of throwing 'good books' on the trash heap. Also, 'book burning' has unpleasant connotations. If you can explain that only those books and nonprint items in the worst physical condition get this treatment, you may be able to avert negative publicity. Another potentially embarrassing situation that can occur is for well-intentioned patrons to 'find' library books in the trash and assume vandals have put them there. Although this method of disposal cannot be avoided, it should be the last resort.

Epilogue--Encouraging the Hesitant Weeder

Hopefully, this manual has already capably demonstrated the place of weeding in the cycle of library service, the benefits of regular CREWing, and the streamlined simplicity of the CREW method. However, there are several common objections to rigorous weeding often heard from librarians not comfortable with the task. Since they serve to justify keeping collections unweeded and unreviewed, they need to be considered in this manual.

I am proud of having a large selection of books for my patrons. Besides, I need to have enough volumes in the collection to remain a system member or meet standards.

BUT - Quality counts more than quantity, both with the patrons and with the Texas State Library & Archives Commission. While the State Library will not automatically disqualify you for system membership without taking other factors into consideration, annual statistics that show virtually no discards could indicate that the collection may be outmoded or growing in a haphazard fashion. **A good library is not necessarily a big library**. The level and quality of service the library can offer is of utmost importance. Of course, if the size of the collection is very near the minimum required for system membership, it simply cannot be weeded quite as strictly as a library collection safely over the requirement. In such cases, libraries concerned with going below minimum requirements should check with the Texas State Library & Archives Commission for more information. Once the volume count exceeds the library's shelf capacity, however, full-scale CREWing should be done in earnest. For service, efficiency counts more than raw size. Ask your regional system staff for help in procuring newer, higher quality books. An outdated book added to your collection today costs money (the time you spend processing the book) and will be of little or no use to your patrons.

I don't have the staff time. We are too busy performing more critical library tasks.

BUT - If you have the time to select new books, then you have the duty to weed those that are no longer useful to your collection. No one has all the time needed to do important tasks, but you MUST find the time to weed. Your library's image, credibility, and quality of service are at stake. To help find the needed time, make it a regular part of your routine, and use the guidelines in this manual to help make it a time-efficient process.

If I throw this book out, I just know someone will ask for it tomorrow.

BUT - This situation seldom actually occurs and is certainly less common than a patron asking for a book you decided not to acquire for the library in the first place. A detailed weeding study conducted over a three-year period at Yale University revealed that in two years, only 3.5% of the weeded items were asked for.[16] In fact, a book that has not been used in the past five years is unlikely to be used in the next five. The 'weeded needed' will be few, their absence is less harmful to public relations than a habitually cluttered and unreliable collection, and most likely they are still accessible through interlibrary loan. Moreover, CREW cuts down on the number of 'asked-for unacquired,' by alerting the librarian to gaps, losses, and the full range of materials available. The reality is that if no one is using the book, you are probably the only one who will miss it! Remember that the best items in your collection are the items that are being used.

THE COLLECTION WEEDS ITSELF—WE LOSE BOOKS EVERY DAY!

Losing books to theft or non-return doesn't count! Those are books someone wanted enough, presumably, to keep instead of bringing it back to the library. Attrition from loss and theft certainly means you need to replace some of those books with newer editions or different titles but you are putting them back on shelves that are crowded with a lot of books that aren't worth stealing, or borrowing.

Well, this old book may be rare and valuable, even a first edition!

BUT - Even if the old book dates back before 1900, chances are one in several thousand that it is worth even as much as $5.00. Ex-library books, even when they are otherwise valuable titles, are rarely of interest to collectors. Why? Because libraries mark up the books with accession numbers, bar codes, property stamps, etc., and the books have often received heavy use.

Only a handful of unique copies, authors' personal copies, or other treasures sell for more than a few dollars. Old books are overwhelmingly rubbish or cheap curios. They almost never deserve the glass-fronted cases or separate stacks they too often receive at the expense of library space, time, money, and usefulness. 'First Editions' are also worth very little, especially when 'damaged' by library markings and worn by use, except in rare cases where only a handful of copies remain. The first edition of an unimportant book is worthless, even if it is unique. A high-priced ($30.00 or more) first edition is almost always a classic or near classic that was not appreciated when it was first published. If you have never heard of the title, it almost certainly is not of this sort.

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[16] *Weeding Library Collections: Library Weeding Methods*, 3rd edition, 1989, p. 50, 52.

If you still think you have a valuable book, check some of the online out-of-print book websites like Alibris, http://www.alibris.com/, or ABE Books, http://www.abebooks.com/, to see if there is any market for the item. (ABE Books also provides interesting articles about collectable authors—if you have ANYTHING signed by J.K. Rowling, get it off your shelf—and other topics that may help you locate saleable items in your donations and discards.) If the book is in fact worth more than a few dollars, weed it and sell it! If you are selling a large number of books that you believe to be valuable, contact a reputable antiquarian book dealer for their estimated auction value of the book. Most real rare books are sold at auctions in New York or London.

If I discard a book because it has not been used, isn't that admitting publicly that I made a mistake in selecting it?

SO? You are human! Every librarian makes those kinds of mistakes. In many cases, books we select are NEVER used by a patron. Selection is not based on scientific formulas or objective measurements. To a very large extent, selection must be based on the librarian's judgment of books and expectations of what people will want to read. However, there are millions of books available, and over 50,000 new books released every year. It's impossible for even the best librarian to always 'be right." Judgment can be sharpened by training and experience, but it can never be made infallible.

Isn't weeding really just irresponsible destruction of public property?

NO. As explained in the first part of the manual, weeding is a very constructive process that increases the library's ability to give a 'full service value per dollar" and that improves the appearance and comfort of the library building. As for 'irresponsibility,' the CREW method's very first step involves checking any possible legal constraints specifically to avoid violating civic responsibilities. Further, destruction by trashing or burning is not the only method of disposal; in fact, it is the last-choice option. Weeding library materials that are no longer of use is no more 'irresponsible' than discarding broken equipment from the recreation center or repaving a road that has become worn from use. Ask if the police department still has old uniforms and vehicles!

We need to have something (or anything) on this subject. And we need every copy of this classic for the school rush.

Bᴜᴛ – Is 'something' really better than 'nothing' when it is outdated and erroneous? Ask yourself if you would use the book to do your own research. Would you want your child's grade to depend on using outdated information? If 'something' is needed on a subject, then a good resource that will be used is called for. If it will not be used, even the only book on a subject, such as paleobotany, is simply cluttering the shelves. If an unused book takes up space, an inaccurate book is worse. If you really need a resource on a particular subject, acquire something new, accurate, well written, and sturdily bound. If it is within the library's mission to provide enough copies of classics to meet the needs of a class of students, then those extra copies could be kept in a storage room until the rush or replaced with clean, easy-to-store, attractive, inexpensive paperbacks.

Remember that CREWing entails a **continuous** process of **review**, **evaluation** and **weeding**. Weeding itself should be an ongoing, routine part of the work schedule, not a onetime operation or a 'once in awhile' project. Maintaining this cyclical process will prevent the buildup of unused, unwanted and damaged materials, which in turn leads to a monumental weeding task after months or years of neglect. In the long run, CREWing actually improves the quality of your library and enhances its reputation for providing accurate and dependable service in uncluttered, pleasant surroundings. In the short run, it augments the library director's professional judgment and working knowledge of the collection.

The point of weeding, and of CREWing, and of all other library functions, technical or public, is to provide your patrons with better service, clearer access to the world's knowledge, and entertainment. By streamlining your collection for efficient and reliable use, you are making it easier and faster for the people of your community to find the facts, phrases, and stories they need. Therefore, take this manual and discuss the matter with your staff, volunteers, and Board. Think about it for a while. Then, start working toward efficient, effective service and a high quality collection.

Don't delay—start weeding today!

Bibliography

Standard Collection Bibliographies

Note that some of these titles are expensive; check with your regional system office, the Texas State Library's Library Science Collection, or a large public library to borrow items that you do not need on-hand on a regular basis. Use them to compare your holdings to those that are highly recommended, core collection titles, or to help you make decisions about whether to replace, retain, or discard an item that has marginal circulation or is in poor condition.

Bank Street College of Education. *The Best Children's Books of the Year, 2008*. Teachers College Press, 2008.

Barr, Catherine and John T. Gillespie. *Best Books for Children: Preschool Through Grade 6, 8th Edition*. Libraries Unlimited, 2005.

Barr, Catherine and John T. Gillespie. *Best Books for Children: Preschool Through Grade 6, Supplement to the 8th Edition.* Libraries Unlimited, 2007.

Books Out Loud: Bowker's Guide to Audiobooks 2008. Bowker, 2008.

Bowker's Complete Video Directory 2008. Bowker, 2008.

Brice, Donaly and Bill Stein. *More Than a Lone Star: A Texas History Selection List for the Small Public Library*. Houston Area Library System, 2003.

The Complete Directory of Large Print Books and Serials 2008. Bowker, 2008.

Cords, Sarah Statz and Robert Burgin. *The Real Story: A Guide to Nonfiction Reading Interests*. Libraries Unlimited, 2006.

East, Kathy and Rebecca L. Thomas. *Across Cultures: A Guide to Multicultural Literature for Children*. Libraries Unlimited, 2007.

Fichtelberg, Susan. *Encountering Enchantment: A Guide to Speculative Fiction for Teens*. Libraries Unlimited, 2006.

Fraser, Elizabeth. *Reality Rules!: A Guide to Teen Nonfiction Reading Interests*. Libraries Unlimited, 2008.

Frolund, Tina. *Genrefied Classics: A Guide to Reading Interests in Classic Literature*. Libraries Unlimited, 2006.

Gillespie, John T. and Catherine Barr. *Best Books for High School Readers: Grades 9-12*. Libraries Unlimited, 2004.

Gillespie, John T. and Catherine Barr. *Best Books for High School Readers: Grades 9-12, Supplement to the First Edition*. Libraries Unlimited, 2006.

Gillespie, John T. and Catherine Barr. *Best Books for Middle School and Junior High Readers*. Libraries Unlimited, 2004.

Gillespie, John T. and Catherine Barr. *Best Books for Middle School and Junior High Readers: Grades 6-9, Supplement to the First Edition*. Libraries Unlimited, 2006.

Herald, Diana Tixier. *Teen Genreflecting: A Guide to Reading Interests,* 2nd Edition. Libraries Unlimited, 2003.

Herald, Diana Tixier and Bonnie Kuntzel. *Fluent in Fantasy*. Libraries Unlimited, 2007.

Herald, Diana Tixier and Wayne A. Wiegand. *Genreflecting: A Guide to Popular Reading Interests*, 6th Edition**.** Libraries Unlimited, 2005.

Husband, Janet G. and Jonathan F. Husband. *Sequels: An Annotated Guide to Novels in Series*, 4th Edition. American Library Association, 2008.

Hysell, Shannon Graff. *Recommended Reference Books for Small and Medium-sized Libraries and Media Centers, vol. 28*. Libraries Unlimited, 2008. (The current edition reviews titles published in the previous two years. Check earlier editions to analyze older reference tools.)

Lima, Carolyn W. and John A. Lima. *A to Zoo: Subject Access to Children's Picture Books*, 7th Edition. Libraries Unlimited, 2005.

Lima, Carolyn W. and Rebecca L. Thomas. *A to Zoo: Subject Access to Children's Picture Books Supplement to the 7th Edition*. Libraries Unlimited, 2008.

Lynn, Ruth Nadelman. *Fantasy Literature for Children and Young Adults: A Comprehensive Guide, 5th Edition*. Libraries Unlimited, 2005.

Magazines for Libraries, 17th Edition. Bowker, 2008.

New York Public Library. "100 Picture Books Everyone Should Know." http://kids.nypl.org/reading/recommended2.cfm?ListID=61]

O'Gorman, Jack. *Reference Sources for Small and Medium-sized Libraries*, 7th Edition. American Library Association, 2007.

Pearl, Nancy. *Book Crush: For Kids and Teens*. Sasquatch Books, 2007.

Pearl, Nancy. *More Book Lust*. Sasquatch Books, 2005.

Pilger, Mary Anne. *Science Experiments Index for Young People*, 4th Edition. Libraries Unlimited, 2005.

Schwedt, Rachel E. and Janice DeLong. *Core Collections for Children and Young Adults*. Scarecrow Press, 2008.

The Software Encyclopedia 2008. Bowker, 2008.

Thomas, Rebecca L. and Catherine Barr. *Popular Series Fiction for Middle School and Teen Readers*. Libraries Unlimited, 2005.

"Top Fifty Gaming Core Collection Titles." *Young Adult Library Services*. v6 no2 Winter 2008, p36-38+48.

Wadham, Tim. *Libros Essenciales: Building, Marketing, and Programming a Core Collection of Spanish Language Children's Materials*. Neal-Schuman, 2006.

Walker, Barbara J. *The Librarian's Guide to Developing Christian Fiction Collections*. Neal-Schuman, 2006. (The three titles in this set were originally published as individual volumes in 2005 covering core books and authors for adults, teens, and children.)

Wilson Standard Catalogs / Core Collections Series
    (The Wilson Standard Catalog Series titles are available in two formats, print and electronic. New editions of each print volume have Core Collection in the title, as is currently used in the online edition of each title. See also Electronic Databases section following.)

Children's Catalog. 19th Edition. H.W. Wilson, 2006.
    (annual supplements are published between editions)

Senior High Core Collection. 17th Edition. H.W. Wilson, 2007.
    (annual supplements are published between editions)

Public Library Core Collection: Nonfiction. 13th Edition. (Public Library Catalog) H.W. Wilson, 2008.
    (annual supplements are published between editions)

Middle and Junior High School Library Catalog. 9th Edition. H.W. Wilson, 2005.
    (annual supplements are published between editions)

Fiction Catalog. 15th Edition. H.W. Wilson, 2006.
(annual supplements are published between editions)

Young Adult Library Services. "Top Fifty Gaming Core Collection Titles."
http://wikis.ala.org/yalsa/index.php/Gaming_Lists_&_Activities

Zbaracki, Matthew D. *Best Books for Boys: A Resource for Educators*. Libraries Unlimited, 2008.

Recommended Lists and Best of the Year Lists

The American Library Association and journals such as *Library Journal*, *School Library Journal*, and *Booklist* release notable and 'best of the year' lists annually. Check the current lists for good replacement titles and check previous lists to help you make decisions about the quality of titles that are circulating marginally or to decide whether to replace a title.

ALSC's Children's Notables Lists
http://www.ala.org/ala/mgrps/divs/alsc/awardsgrants/childrensnotable/index.cfm
This division of the American Library Association issues annual lists of notable materials in book, film, audio, and software formats for children from birth through age 12. Usually released in January immediately following the Midwinter Meeting. Also check award lists, including the Newbery Award, the Caldecott Award, Siebert Award, the Odyssey Award, and others.

Notable Books for Adults
http://www.ala.org/ala/mgrps/divs/rusa/awards/notablebooks/lists/index.cfm
The Reference and Users Services Division of the American Library Association issues an annual list of 25 important and highly readable books of fiction, nonfiction, and poetry for adult readers.

Outstanding Reference Sources
http://www.ala.org/ala/mgrps/divs/rusa/awards/outstandingreferencesources/index.cfm
The Reference and Users Services Division of the American Library Association issues an annual list of outstanding reference resources, emphasizing those of most value to small and medium-sized public libraries. Issued each year in May.

Notable Videos
http://www.ala.org/ala/mgrps/rts/vrt/initiatives/notablevideos/index.cfm
Video Round Table, a group within the American Library Association, provides an annual list of fifteen notable non-feature how-to and educational films.

YALSA Book Awards & Booklists

http://www.ala.org/ala/mgrps/divs/yalsa/booklistsawards/booklistsbook.cfm

This division of the American Library Association issues annual lists of notable materials in book, film, and audio formats for teens. Usually released in January immediately following the Midwinter Meeting. Also check award lists, including the Alex Award, the Printz Award, and Young Adult Nonfiction Award, as well as lists like "Outstanding Books for the College Bound" and "Great Graphic Novels for Teens."

Indexes

While most standard indexes are now available electronically, some libraries keep older print copies. Retain works that are listed in standard indexes and are still being used by patrons. (See also Electronic Databases and Online Resources sections following.)

The Columbia Granger's Index to Poetry in Anthologies. 13th Edition. Columbia University Press, 2007.

Index to Poetry for Children and Young People: 1993-1997. H. W. Wilson, 1998. (Other Volumes: 1964-1969, 1970-1975, 1976-1981, 1982-1987, 1988-1992).

Play Index 1998-2002. H. W. Wilson, 2004. (Other Volumes: 1949-1952, 1953-1960, 1961-1967, 1968-1972, 1973-1977, 1978-1982, 1983-1987, 1988-1992, 1993-1997).

Short Story Index, 1999-2004. H. W. Wilson, 2005. (Other Volumes: 1900-1949, 1950-1954, 1955-1958, 1959-1963, 1964-1968, 1969-1973, 1974-1978, 1979-1983, 1984-1988, 1989-1993, 1994-1998, 2000, 2003).

Electronic Databases

Listed here are electronic database versions of standard indexes. These are available through paid subscriptions but some may be available through the TexShare databases at no or reduced fees for your library. Link to www.texshare.edu for more information on databases available to public and academic libraries in Texas.

Children's Core Collection

http://www.hwwilson.com/print/childcat.cfm

Database version of *Children's Catalog*.

The Columbia Granger's World of Poetry

www.columbiagrangers.org/grangers/index.jsp

Electronic indexed poetry.

Global Books in Print

http://www.globalbooksinprint.com/bip/

Comprehensive guide to books in print.

Graphic Novels Core Collection

http://www.hwwilson.com/Databases/graphicnovels_core.htm

More than 2000 recommended titles.

Middle School and Junior High Core Collection

http://www.hwwilson.com/print/mjhscat.cfm

Database version of *Middle and Junior High School Library Catalog.*

Nonbook Materials Core Collection

http://www.hwwilson.com/Databases/nonbook_core.htm

Recommended multimedia resources.

Play Index

http://www.hwwilson.com/Databases/playindex_e.htm

Database version of *Play Index.*

Public Library Core Collection: Fiction

http://www.hwwilson.com/print/fictcat.cfm

Database version of *Fiction Catalog.*

Public Library Core Collection: Nonfiction

http://www.hwwilson.com/print/publibcat.cfm

Database version of *Public Library Catalog.*

The Reader's Advisor Online

http://rainfo.lu.com/

Database version of the *Genreflecting series and other reader's advisory tools*

Senior High Core Collection

http://www.hwwilson.com/print/srhscat.cfm

Database version of *Senior High Core Collection.*

Short Story Index

http://www.hwwilson.com/databases/storeindec.htm

Database version of *Short Story Index.*

Online Resources

Listed here are selected online resources which appear in the text of this manual. These websites offer free resources to help with collection development, selection, and weeding decisions.

Adult Reading Round Table Booklists

> http://www.arrtreads.org/booklists.htm
>
> The members of this group are librarians and library staff from libraries in the Chicago area who are interested in leisure reading and promoting reading for pleasure. Check out their reading lists and genre studies.

Alibris

> www.alibris.com
>
> If you think you have a valuable book, check it on Alibris, an out-of-print and rare book dealer. Alibris for Libraries will help to locate used, new and hard-to-find books, movies and music. Alibris offers out-of-print, older in-print, and otherwise unavailable titles in stock, including custom tools for managing replacement and collection development projects.

Altered Books website

> http://www.alteredbookartists.com/,
>
> The International Society of Altered Book Artists website offers an amazing assortment of art made from old books.

Better World Books

> http://www.betterworldbooks.com/
>
> This program works with libraries across the country to sell discarded and donated material on 20 online marketplaces to generate funding for both libraries and non-profit literacy initiatives.

Blogistics

> http://www.blogistics.com/
>
> Purchase used books directly from libraries. Note that each company has specific requirements

Cash 4 Books

> http://www.cash4books.net/
>
> This online company offers their service to anyone that needs to sell books quickly and easily. They buy a wide variety of books, but they specialize in textbooks, non-fiction, business, and professional/technical books.

Determining the Value of Donated Property

http://www.irs.ustreas.gov/pub/irs-pdf/p561.pdf

This Internal Revenue Service (IRS) Publication 561 is designed to help donors and appraisers determine the value of property (other than cash) that is given to qualified organizations.

Disposal or Weeded, Discarded, and Unwanted Books

http://www.lrs.org/documents/field_stats/weeding_LP.pdf

This 2008 compilation by Maura McGrath for Library People: Friends of Colorado Libraries

Duplicates Exchange Union

http://www.ala.org/ala/mgrps/divs/alcts/mgrps/ecoms/duplicatesexch/duplicatesexchange.cfm

A group within the American Library Association, ALCTS Division, this group connects those who need materials with those who have more than they need. Members communicate by electronic discussion list to exchange usable library material. All kinds of libraries and librarians, primarily of small college and public libraries participate. Everyone is welcome.

Green Weeding: Promoting Ecofriendly Options for Library Discards

http://www.libraryjournal.com/article/CA6592668.html

This recent article by Sarah Penniman and Lisa McColl in *Library Journal* (September 15, 2008) captures some current library activities and options for environmentally friendly weeding and online selling of discards.

The Modern Library

http://www.randomhouse.com/modernlibrary/100best.html

Lists of the 100 'best' novels and non-fiction books, voted on by readers may help libraries determine a core collection of classics and important contemporary books to retain in the collection.

The New Planning for Results: A Streamlined Approach Course.

http://www.elearnlibraries.com/courses/the_new_planning_for_results/index.html

This course is based on the popular American Library Association publication, *The New Planning for Results: A Streamlined Approach* by Sandra Nelson.

Sending Books to Needy Libraries: Book Donation Programs

http://www.ala.org/ala/aboutala/hqops/library/libraryfactsheet/alalibraryfactsheet12.cfm

This American Library Association Fact Sheet 12 offers information on organizations that do want books for specific projects.

The Sunlink Weed of the Month Archives

www.sunlink.ucf.edu/weed/

Funded by the Florida Department of Education, the SUNLINK Weed of the Month program introduced a new weeding subject area each month from September 1997 to December 2005, organized by the primary Dewey classification. Although no longer adding to this website, the guidelines for weeding each topic area are very useful.

Tips for Online Book Sales

http://www.folusa.org/resources/tips.php

Friends of Libraries USA (FOLUSA) website offers "Tips for Online Book Sales," "Online Resources" and "List of Friends Selling Online."

Your Old Books

http://www.rbms.info/yob.shtml

This guide from the American Library Association, ACRL, Rare Books and Manuscripts Section, lists resources for the evaluation and appraisal of books, offers questions and answers on what makes a book rare, and suggested organizations that welcome book donations.

Further Readings

Listed here are journal articles and books that provide additional information on weeding and topics related to collection development and maintenance. For those in Texas, remember that many of the articles are available through databases in TexShare.

Alabaster, Carol. *Developing an Outstanding Core Collection: A Guide for Public Libraries*. American Library Association, 2002.

Baumbach, Donna J. and Linda L. Miller. *Less is More: A Practical Guide to Weeding School Library Collections.* American Library Association, 2006.

Bazirjian, Rosann. "The Ethics of Library Discard Practices," in *Legal and Ethical Issues in Acquisitions*. Haworth Press, 1990.

Bromann, Jennifer. "Letting Go: How One Librarian Weeded a Children's Magazine Collection." *School Library Journal* v. 48 no. 7 (July 2002) pp. 44-46.

"Commentary on weeding." *Library Administrator's Digest*. Feb 1999. FindArticles.com. 13 May 2008. http://findarticles.com/p/articles/mi_qa3858/is_199902/ai_n8843523

Doll, Carol A. and Pamela Petrick Barron. *Managing and Analyzing Your Collection: A Practical Guide for Small Libraries and School Media Centers*. American Library Association, 2002.

Dilevko, Juris. "Weed to achieve: a fundamental part of the public library mission?" *Library Collections, Acquisitions, & Technical Services* v. 27 no. 1 (Spring 2003) pp. 73-96. http://www.moyak.com/researcher/resume/papers/weeding-pdf.pdf

"Evaluating Library Collections: An Interpretation of the Library Bill of Rights." Adopted February 2, 1973, by the American Library Association Council; amended July 1, 1981. http://www.ala.org/Template.cfm?Section=interpretations&Template=/ContentManagement/ContentDisplay.cfm&ContentID=8537

Garcia, June and Sandra Nelson. *Public Library Service Responses 2007*. American Library Association, 2007.

Greiner, Tony and Bob Cooper. *Analyzing Library Collection Use with Excel*. American Library Association, 2007.

Handman, Gary. *Video Collection Development in Multi-type Libraries: A Handbook*. 2nd Edition. Libraries Unlimited, 2002.

Hoffmann, Frank W. and Richard J. Wood. *Library Collection Development Policies: School Libraries and Learning Resource Centers*. Scarecrow Press, 2007.

Hoffmann, Frank W. and Richard J. Wood. *Library Collection Development Policies: Academic, Public, and Special Libraries*. Scarecrow Press, 2005.

Hogan, Cecilia. "Library Book Sales: Cleaning House or Cleaning Up?" *Searcher* v. 16 no. 3 (March 2008) pp. 36-46.

Larson, Jeanette and Herman L. Totten. *The Public Library Policy Writer: A Guidebook with Model Policies on CD-ROM*. Neal-Schuman, 2008.

Metz, Paul and Caryl Gray. "Public Relations and Library Weeding." *The Journal of Academic Librarianship* v. 31 no. 3 (May 2005) pp. 273-9.

Nelson, Sandra. *Strategic Planning for Results*. American Library Association, 2008.
This is the fully revised version of *Planning for Results* that includes *Public Library Service Responses 2007*.

Nelson, Sandra. *The New Planning for Results: A Streamlined Approach*. American Library Association, 2001.

Public Library Association. *Weeding Manual*. 2nd Edition. American Library Association, 2002.

RBMS Publications Committee. *Your Old Books (Revision 2005.2).* Rare Books and Manuscripts Section, Association of College and Research Libraries, American Library Association, 2006. http://www.rbms.info/yob.shtml#21

Slote, Stanley J. *Weeding Library Collections: Library Weeding Methods*. 4th Edition. Libraries Unlimited, 1997.

Texas Library Association. *Texas Public Library Standards*. Texas State Library and Archives Commission, 2004. http://www.tsl.state.tx.us/plstandards/

Periodicals and Electronic Lists

Booklist

http://www.ala.org/ala/aboutala/hqops/publishing/booklist_publications/booklist/booklist.cfm

This publication from the American Library Association includes a regular 'roundup' of reference titles and articles that focus on 'core collections' for specific subject areas, including types of novels. For example, core collections have been covered for historical sagas, graphic novels featuring women, and African American cuisine. If you don't subscribe (you should!), search for these resources through the TexShare databases when making weeding decisions.

Collection Management

From Haworth Press, this quarterly journal is devoted to the theories, practices, and research findings involved with the modern management of library collections. ISSN: 1545-2549

COLLDV-L

http://serials.infomotions.com/colldv-l/

This listserv is a moderated discussion list directed primarily to those involved with library collection development. Although some discussions are rather academic and many of the postings deal with employment opportunities, subscribers can post questions regarding weeding activities and replacement of materials.

Fiction_L

http://www.webrary.org/rs/Flmenu.html

This electronic listserv is hosted by the Morton Grove Public Library and is devoted to reader's advisory topics including collection

development issues, booklists and bibliographies. Check out the booklists for great fiction titles on a wide range of topics.

Library Journal

www.libraryjournal.com

Each issue includes a roundup of reference titles. Also check out the collection development calendar online, which highlights specific subject areas. Each article includes new titles and classics. For example, the January 2008 issue focused on pregnancy and childbirth, while June 2007 covered water sports.

School Library Journal

http://www.schoollibraryjournal.com/

Despite its name, this journal covers materials for youth in school *and* public libraries. In addition to reviews and 'editor's choice' lists of the best books and media for the year, articles may focus on important titles in particular subject areas or genres. For example, the May 2008 issue included a focus on science fiction.

Appendix

Overview Chart of CREW Formulas

Dewey Class	CREW Formula	Dewey Class	CREW Formula
000		610	5/3/MUSTIE
004	3/X/MUSTIE	629	X/2/MUSTIE
010	10/3/MUSTIE	630	5/3/MUSTIE
020	10/3/MUSTIE	635	10/3/MUSTIE
030	5/X/MUSTIE	636	5/2/MUSTIE
Other 000s	5/X/MUSTIE	640	5/3/MUSTIE
		649	5/3/MUSTIE
101	15/5/MUSTIE	670	10/3/MUSTIE
133	10/3/MUSTIE		
150	10/3/MUSTIE	700	
160	10/3/MUSTIE	709	X/3/MUSTIE
170	10/3/MUSTIE	720	X/3/MUSTIE
		737	5/3/MUSTIE
200	10/3/MUSTIE or 5/3/MUSTIE	740	X/3/MUSTIE
		770	5/3/MUSTIE
		791	10/2/MUSTIE
306	5/2/MUSTIE	793 - 796	10/3/MUSTIE
310	2/X/MUSTIE		
320	5/3/MUSTIE	800	X/3/MUSTIE
323	5/3/MUSTIE		
330	3/3/MUSTIE	910	3/2/MUSTIE
340	5/2/MUSTIE	Personal Travel Narratives	5/2/MUSTIE
350	5/3/MUSTIE	930 - 999	10/3/MUSTIE
360	5/3/MUSTIE	92, 920 or B	X/3/MUSTIE
370	10/3/MUSTIE		
390 - 394	10/3/MUSTIE	F (Fiction)	X/2/MUSTIE
395	5/3/MUSTIE	Graphic Novels	X/1/MUSTIE
398	X/3/MUSTIE	E (Easy Readers/ Picture Books)	X/2/MUSTIE
		JF (Juvenile Fiction)	X/2/MUSTIE
400	10/3/MUSTIE	YA Fiction (Teen Fiction)	3/2/MUSTIE
		J and YA Non-fiction	Use adult criteria (and review children's general criteria)
500	5/3/MUSTIE		
507	10/3/MUSTIE	Periodicals/ Newspapers	3/X/X
510	10/3/MUSTIE	Government Documents	3/2/X
520	5/3/MUSTIE	Local History	X/X/X
550	X/3/MUSTIE		
560	5/2/MUSTIE	Nonprint	WORST
570	7/3/MUSTIE	Film Formats	2/1/WORST
580	10/3/MUSTIE	Audio Formats	X/2/X

Disposal Slips

Disposal Slip

Book Title or Call Number:_____

❑   Bindery   ❑   Discard
❑   Mend/Preserve   ❑   Book Sale
❑   Promote   ❑   Replacement/New Edition
❑   Donate to: _____
❑   Sent To: _____
❑   Check Database for other locations of this title:_____
Other locations of this title: _____
Title to replace this volume: _____
Authorizing Agent:_____

- -

Disposal Slip

Book Title or Call Number:_____

❑   Bindery   ❑   Discard
❑   Mend/Preserve   ❑   Book Sale
❑   Promote   ❑   Replacement/New Edition
❑   Donate to: _____
❑   Sent To: _____
❑   Check Database for other locations of this title:_____
Other locations of this title: _____
Title to replace this volume: _____
Authorizing Agent:_____

- -

Disposal Slip

Book Title or Call Number:_____

❑   Bindery   ❑   Discard
❑   Mend/Preserve   ❑   Book Sale
❑   Promote   ❑   Replacement/New Edition
❑   Donate to: _____
❑   Sent To: _____
❑   Check Database for other locations of this title:_____
Other locations of this title: _____
Title to replace this volume: _____
Authorizing Agent:_____

- -

Disposal Slip

Book Title or Call Number:_____

❑   Bindery   ❑   Discard
❑   Mend/Preserve   ❑   Book Sale
❑   Promote   ❑   Replacement/New Edition
❑   Donate to: _____
❑   Sent To: _____
❑   Check Database for other locations of this title:_____
Other locations of this title: _____
Title to replace this volume: _____
Authorizing Agent:_____

Programs and Program Kits

Programs and events are core features of effective, community-focused library services. From children's story times to adult book clubs and teen after-school clubs, strong programming is an important part of making the library an integral and relevant part of your community.

Effective Library Programming

Chances are your library already runs some fantastic programs and events! Great, effective library programming takes into consideration the needs and desires of its community members. If your patrons come to you with suggestions or ideas for programs -- listen to them!

Not sure where to start? Talk to your fellow library managers to find out what has been successful in their communities! Websites like Pinterest and YouTube, conference sessions, and webinars are also great resources for finding out about new programming ideas and trends. Your Client Services Librarian at Shortgrass is also excited to help you at all stages of the planning and execution process.

Shortgrass Programming Kits

In order to help you run strong, engaging and cost-effective programs at your library, Shortgrass is continually developing programming kits that are available for borrowing by all member libraries. As with many of our Shortgrass services, our programming kits are intended to provide access to a greater variety of programming tools, materials, and devices than any one library might be able to justify on its own. Our kits are updated regularly, and depend on your feedback and suggestions to continually improve.

A sampling of current Shortgrass programming kit offerings:
- Button maker
- MaKey MaKey
- Osmo Lab
- Escape room (yes, in a box!)
- Candy sushi
- Keva Planks

A complete, updated listing of available kits is always available at:
https://shortgrass.ca/services-for-libraries/consultation-and-support/programming-kits.

Please refer to this list when you wish to book a programming kit.

1

To book a programming kit:

1. Decide the date of your event, when you will need the kit. The more notice you are able to give for your booking, the better, especially at busier times of year (e.g. summer vacation or spring break). Kits are generally booked for 1-2 weeks at a time, depending on your program date, the delivery schedule, and the time of year.
2. Email programmingkits@shortgrass.ca to request your booking, indicating when you need it for, for how long, and (in the case of kits with consumable items, like the button maker or candy sushi) how many people you expect to attend. This will help us ensure your kit is prepared for your specific event.
3. The kit will be sent to with your regular delivery, as close to your program date as possible. If you would like it to be delivered earlier (so you can familiarize yourself with its use), please let us know and we will do our best to accommodate your request.
4. Run your program! Depending on the program, it may be helpful to enlist another person to help out. Please fill out the included evaluation form -- this helps us to identify issues that need to be addressed or alterations that need to be made, so that the next program runs smoothly.
5. Repack the kit contents and send it back to Shortgrass in the next delivery run. Hope you had fun!

Program Promotion

Successful programs are dependent on people actually showing up to your event. Make sure your community is aware of it by spreading the word.

Steps you can take to advertise your program:
- Make a poster for your library, community, church, and school bulletin boards.
- Promote it on your library's social media accounts: if your library has Twitter, Facebook, and Instagram, post about your event there.
- Promote it on your library's website: Shortgrass can help you make a banner for your website that advertises your event.
- Promote it elsewhere in your community: if your community has a newspaper or a digital advertising board, for example, you may be able to place an ad for your event in it.

New Programming Kits

We do our best to ensure that our program kit offerings are regularly updated with fresh options for you to use, and we love hearing ideas from you! If you have a suggestion for a new kit, let the Client Services Librarian know, and we will evaluate the possibility of adding it to our collection.

2

Summer Reading Program

Why A Summer Reading Program?

For many public libraries, the annual summer reading program (SRP) is the high-water mark for library events and community engagement. Libraries frequently offer a higher volume of children's programming and events during the summer months, when kids are out of school and able to more regularly participate.

The overall aim of the summer reading program is to ensure that kids continue to develop and maintain solid literacy habits during summer vacation, when they do not engage in the regular structure of school. It aims to promote reading as a fun, valuable activity and the library as an exciting, engaging place to visit -- not just during the summer months, but all year long.

What is a Summer Reading Program?

SRPs can take many forms. Many libraries choose to create summer reading games, with special game boards or progress trackers for participants to play each time they visit the library. This could be a Monopoly, Candyland or Snakes and Ladders-based game board, a bingo card, or even a scavenger hunt. These can be reused annually or newly created every year, depending on a library's goals. A participant might be invited to play the game each time they visit the library, or each time they track new reading time. Games often appeal to a broad audience of school aged kids, generally from kindergarten to grade 6, but this will depend on the individual library and the community served. Great examples of library summer reading games can be found on resource sites including Pinterest, LibraryToolshed.ca, or ProgrammingLibrarian.org. You can also ask your colleagues at other Shortgrass member libraries for tips and advice!

Many libraries also choose to run additional library programming in the summer, including storytimes, crafts, and other programs. Libraries may choose to create their own programs based on the SRP theme or participants' ages and interests.Again, resources including Pinterest, LibraryToolshed.ca, and ProgrammingLibrarian.org are all excellent resources for finding program ideas and guides. Shortgrass also has a variety of programming kits available to member libraries to support excellent library programming year-round, including during the SRP. If you would like more information on these kits, please see the "Programming Kits" section of this manual or contact the Client Services Librarian.

If a library is unable or does not wish to create their own summer reading program for any reason, but still would like to run one, TD Bank sponsors a free program for Canadian public libraries. The company provides all the promotional materials, workbooks, and recording sheets free of cost to participating libraries; other items, like prizes, staff/volunteer t-shirts, or tote bags,

may be purchased for a small fee. The theme changes annually (in 2019, it is "The Natural World") and is generally vague enough that it can be used as-is or fit into your own programming plans and themes. While there are guidelines you are required to follow if you use the TDSRC, they are generally fairly flexible and easy to follow. Please note that if you opt to participate in this program, you must follow the branding and sponsorship acknowledgement related guidelines outlined by TD.

Preparing for the Summer Reading Program

Preparations for the SRP generally begin several months in advance of the program's start. Libraries need to determine whether they wish to participate in the annual TD-sponsored summer reading program (more on that shortly) or if they wish to develop their own version of the program. Early in the year, you will also need to determine whether you are able (and want to) hire a summer student to assist you with running your SRP. Funding to help pay for summer students is available through a variety of programs, including the provincial STEP program and a variety of federal programs, such as Young Canada Works.

A sample timeline for summer reading program preparations might look like this:

- January: Determine whether you would like to hire a summer student to help you run the program and apply for Young Canada Works and/or STEP funding. As of 2019, applications must be completed online. You may need to consult your board on this. While grant funding for summer students is available, it covers only part of the expenses related to employing a summer student.
- January: You will be asked to choose a preferred date for the Shortgrass-sponsored summer reading concert.
- February or March: the Client Services Librarian will contact you with information regarding optional participation in the TD-sponsored Summer Reading Club (TDSRC). If participating, you will order your free promotional materials for the program at this time. Even if you are not participating in the TDSRC, you will probably begin planning your own summer reading activities at this time.
- April: You will be told the amount of funding Shortgrass will provide you for summer reading program supplies and prizes. At this time, you will also have the opportunity to order prizes and TDSRC-branded items (if participating in TDSRC).
- May-June: Preparation for SRP programming and events
- July-August: Summer Reading Program!
- September/October: Submit your summer reading program statistics to the Client Services Librarian. You're finally free!

Shortgrass Support of Summer Reading Programs

As previously mentioned, to help you succeed, Shortgrass supports library summer reading programs in a variety of ways, including organizing a summer concert tour of member libraries

by a children's performer, providing assistance with running your programs, and providing some funding towards the purchase of program materials and supplies.

Allotment of Funds for Summer Reading

Shortgrass is pleased to be able to provide funding for the purchase of summer reading program materials and supplies. Each year, all member libraries receive a set dollar amount that can be used to support your summer reading program. This amount is based on our allotment formula, whereby funds are distributed proportionally based on the percentage of population served by each member library. (For further information on allotments and how they are determined, please see the "Materials Levy & Allotments" section of this manual.)

How a library spends this money is determined by the library manager and board, so long as it is used to support the summer reading program. A library may wish to purchase prizes, programming supplies (such as craft materials), or snacks for their programs. Prizes may be ordered through a Shortgrass vendor (libraries will be sent an order form in March or April) or purchased elsewhere. If purchased elsewhere, receipts should be submitted to Shortgrass for reimbursement.

Libraries may choose to spend more than their allotment if the funds are available, but will not be reimbursed for this by Shortgrass.

Summer Concert Tour

Every year, Shortgrass arranges for and sponsors a children's performer to tour the library system as part of our libraries' summer reading programming. The summer performer is a free event provided to Shortgrass members to help you provide fun, quality programs to your patrons. Shortgrass will also provide a certain amount of refreshments (usually juice and/or water) for the children in the audience. All we ask is that you do your best to promote the performance at your library and in your community.

The event will usually take place in the library building itself. Other than ensuring there is enough space for the performance to take place (including a "stage" and audience area), your own preparations will be minimal. Performers are generally comfortable setting up and taking down their own equipment.

The tour will generally occur in July or August, depending on performer availability and libraries' preference for dates and times. Library Managers will always be asked to choose a time that works best for your library; Shortgrass will never force a time on you. Please note that libraries can opt out of hosting the summer performer if it does not fit with the library's schedule or plans. No compensation in lieu of a performance will be offered to libraries who opt out of hosting the performance.

Programming Assistance

To help libraries deliver high-quality programming during the summer months, Shortgrass is is pleased to be able to offer a summer programming visit from one of our trained staff members (generally the Client Services Librarian or a summer student). If there is a program you would like us to help you run -- or a kit you would like to see added to the collection -- please get in touch with the Client Services Librarian to make the necessary arrangements!

Summer Parades

Does your community have a summer parade? Many ' communities hold an annual parade as part of their Canada Day or more general summer festivities. If you would like your library to participate in this event -- to advertise library services or raise awareness of your summer reading program -- Shortgrass is able to provide a parade float to assist you.

Parade Scheduling

You will be asked early in the spring -- typically late April or early May -- if there will be a parade in your community and whether you would like us to help you participate. Shortgrass currently has two vehicles which can be decorated and used as parade floats, so even if your parade is on the same day as another community's, may be able to accommodate you.

Parade Staffing

Although the parade float may be provided by Shortgrass, it is representing your library in your community. We will require at least one staff person, board member, or volunteer from your library to be available at the time of the parade to set up the float, ride in the float with Shortgrass staff, and clean up after the event. Your representative will not be responsible for driving the parade float. For insurance reasons, we are unable to allow you to use a Shortgrass vehicle without a Shortgrass staff member present.

Parade Float Decoration

Shortgrass will provide all the decorations needed for the float. If you are able to tell us in advance what your summer reading program or parade theme is (e.g. dinosaurs), we will work to ensure that our float is in line with that theme. If you do not have a specific theme in mind, or are working with the generic TD Summer Reading Program, Shortgrass will decorate to that theme. Please see the attached photo (from the 2018 Foremost parade) for an example of what a decorated float might look like.

1

The Foremost Municipal Library's 2018 Summer Reading Program theme was dinosaurs, so we created a float to match!

Library to You: Services for Homebound Patrons

Offered in conjunction with Marigold Library System, Library to You (L2U) is a **free** mail service offered to patrons who face physical and geographic barriers to reaching their local library. Patrons who are able to access a public library should be encouraged to do so.

How It Works

Patrons who wish to sign up for the L2U service should have a valid library card, which can be obtained by visiting their local public library. At this time, they can also fill out an application form for the service. Patrons who are unable to visit their local library should call 1-866-529-0550 (extension 107) or email l2u@shortgrass.ca for information and/or to register.

Once registered, L2U users will receive two catalogues per year of items available for borrowing. A valid library card also enables these patrons to make use of the regular online catalogue (Bibliocommons) and library e-Resources, including eBooks and eAudiobooks.

Patrons who wish to order physical materials can have up to 5 items mailed to them at a time. If an item is not available at the time of shipment, it will be left out of the order and must be re-requested again. However, if a patron indicates that substitutions are acceptable by listing alternate items, these may be sent instead.

Items are shipped to patrons' mailing address in a returnable mail bag with prepaid return labels so they can be sent back to Shortgrass free of charge.

There is no limit to the number of times a patron can request materials.

Patrons who sign up for ME Libraries are also able to use their card to participate in reciprocal borrowing with other Alberta libraries. (For more information on ME Libraries and reciprocal borrowing, please see the Reciprocal Borrowing section of this manual.)

1

Library Services for Print Disabled Patrons

Did you know that print disabilities affect approximately 10% of the Canadian population?

Per the Centre for Equitable Library Access (CELA), a print disability is "a learning, physical or visual disability that prevents a person from reading conventional print.

More specifically, a print disability can be a:

- Learning disability: An impairment relating to comprehension
- Physical disability: The inability to hold or manipulate a book
- Visual disability: Severe or total impairment of sight or the inability to focus or move one's eyes.

It is important to ensure that all community members have equitable access to library services, even those who are unable to use print media. The Public Library Services Branch (PLSB) of Alberta Municipal Affairs coordinates and funds Alberta public library access to two organizations that respond to the needs of people with print disabilities. These services are the **National Network for Equitable Library Service (NNELS)** and the **Centre for Equitable Library Access (CELA)**, which offer unique but complementary services.

National Network for Equitable Library Service (NNELS)

NNELS is a co-operative network building an online digital repository of alternative format titles. Owned and sustained by Canadian public libraries, they work with international partners, libraries, readers, and publishers (particularly Canadian ones) to make copies of books in accessible formats available to readers in Canada who have print disabilities. The NNELS collection includes both fiction and non-fiction titles, in a variety of genres and for all age groups.

NNELS offers its users a record-on-demand service, where the organisation records material requested by users. This means that if a patron requests a book that is unavailable in an accessible format, NNELS staff and volunteers will try their best to obtain a copy.

Accessing the NNELS Collection

The NNELS collection can be viewed via a web browser. Patrons have access to materials in a variety of formats, including DAISY, PDF, and e-text.

Patron self-registration for NNELS is not available at this time. Library staff are responsible for assisting new users register for the service. To learn how to do so, staff should sign up for NNELS training by visiting: https://nnels.ca/library/training/register/

To learn more, visit https://nnels.ca/ or email support@nnels.ca.

Centre for Equitable Library Access (CELA)

Previously known as the CNIB Library.

In partnership with public libraries, CELA provides access to materials for up to 90% of Canadians with print disabilities. It is a national not-for-profit that is publicly funded through provincial and territorial governments as well as direct subscriptions from public libraries. CELA has the largest catalogue of materials available for patron borrowing, with 500,000 items in their collection. Items in the CELA collection include newspapers, magazines, and books in accessible formats, including audio, e-text, and braille. The CELA collection includes both fiction and non-fiction titles, in a variety of genres and for all age groups.

Accessing the CELA Collection

Patrons who wish to access the CELA collection must have a valid public library card and PIN. Patrons are able to self-register themselves (if they are able to use a computer) or visit their library for assistance.

To self-register, they may visit: https://signup.celalibrary.ca/ and fill out the required form.

If you are assisting them in the library, visit: https://registration.celalibrary.ca/ and follow the instructions. You will need to know your library's CELA ILL account number and PIN. If you do not know these, you may find them out by contacting CELA directly, either by emailing members@celalibrary.ca or by phoning 1-855-655-2273.

Learn more by visiting https://celalibrary.ca/ or emailing help@celalibrary.ca.

Policies & Guidelines for Services to Print Disabled Patrons

The provincial government's Library Service for People with Print Disabilities Operational Policy establishes principles and guidelines for the effective selection of resources to help support Alberta public libraries serve patrons with print disabilities. The policy can be viewed here.

2

As per the Libraries Regulation, public library boards in Alberta are required to create and implement local policy on Provision of Resources for Those Unable to use Conventional Print. For a sample, see Appendix C in this manual.

[Name of Municipality] Library Board

Provision of Service to Those Unable to Use Conventional Print Policy

1. A patron unable to use conventional print may also be known as a print-disabled patron. Print-disabled patrons include any patron who has a perceptual disability, defined in the *Copyright Act* as "a disability that prevents or inhibits a person from reading or hearing a literary, musical, dramatic or artistic work in its original format, and includes such a disability resulting from:

   (a) severe or total impairment of sight or hearing or the inability to focus or move one's eyes,
   (b) the inability to hold or manipulate a book, or
   (c) an impairment relating to comprehension."

2. The [name] Library Board believes patrons unable to use conventional print materials should still have full access to library services and programs. It is therefore essential that library services for print-disabled patrons be incorporated into all aspects of library service.

3. Services to print-disabled patrons shall be incorporated into library planning, including the Plan of Service. Every patron who is print-disabled has unique needs, and a broad range of print disabilities may be found in all communities. The Library Board shall plan its services to meet the needs of a broad range of print disabilities.

4. Services to print-disabled patrons shall be treated as essential core services during the budgeting process, and adequate funds shall be allotted to these services.

5. The [name] Library Board shall work with or use the resources of other local, regional, provincial, and national organizations to provide services to print-disabled patrons. Such organizations may include:

   - The regional library system
   - Public Library Services Branch
   - Local community services organizations (e.g. Alberta Health Services, schools, social services)
   - Regional or national organizations (e.g. CELA, CNIB, NNELS)
   - Other organizations as required

6. All staff members shall be trained on how to provide services to print-disabled patrons. While one or two staff members may take the lead in providing services to print-disabled patrons, they should not be the only ones who know how to provide these services.

7. The [name] Library Board shall endeavour to provide materials in a form appropriate to the patron, from whatever source is available. Forms may include:

   - Adaptive computer software
   - Talking books (e.g. Books on CD, DAISY books)
   - Titles at a variety of reading levels for a variety of audiences (e.g. high/low titles)
   - Large print titles
   - Other adaptive technology

8. Library staff shall incorporate the needs of print-disabled patrons when planning library programs. Staff shall take whatever steps are reasonably possible to ensure print-disabled patrons are able to participate in all library programs, and shall regularly evaluate its programs to ensure they are being delivered effectively to those with print disabilities.

9. The Library Board shall ensure that the library building is accessible to people with print-disabilities. It shall do this by consulting with print-disabled members of its community, as well as building codes and design standards (e.g. Barrier-free design). The Library Board shall budget for appropriate building renovations and upgrades when necessary, but may also consider smaller changes such as accessible desks and clear, glare-free, easy-to-read signage or tactile signage.

10. The Library Board shall promote library services to persons with print disabilities through local media and partner organizations. Services can be promoted in standard and alternative formats, depending on the needs of the audience.

Interlibrary Loans

If a patron would like to borrow an item that is not currently in our Shortgrass catalogue, there are options available to help that patron receive that item. While you may sometimes wish to purchase said item for your library (e.g. if it's a newer title, or by a well-known author), at other times it may be more prudent to temporarily acquire the item through requesting it as an interlibrary loan (ILL). **Interlibrary loans are items that are borrowed from libraries outside of Shortgrass Library System.** Shortgrass both borrows and lends items through interlibrary loan, so your items could potentially travel all over Canada!

While interlibrary loans can theoretically be borrowed from or sent to libraries all over the world, Shortgrass typically only deals with libraries in Canada, and in fact, most of our interlibrary loan materials are either borrowed from or sent to other Alberta libraries! Further, despite our relatively small size, Shortgrass is actually one of the biggest loaners of ILL items in Alberta. Books, movies, video games, and articles are shipped from our headquarters daily.

Interlibrary loan services in Alberta are provided and managed by a variety of players, including The Alberta Library, Chinook Arch Regional Library System, and the Public Library Services Branch. Each of these organisations helps to manage a different element of the ILL system:
- Chinook Arch handles the VDX software (a web-based interlibrary loan platform that serves as the main tool for libraries managing their interlibrary loans);
- PLSB provides funding and access to the government courier service, as well as partial funding for TAL Online;
- The Alberta Library developed and maintains the TAL Online catalogue, which allows users to search for and request items from libraries across the province.

Making Interlibrary Loan Requests

On occasion, you will be asked to make an interlibrary loan request for your patron. Full instructions for completing this process can be found in the Procedures manual.

Shortgrass has centralized the ILL request process for most of our member libraries. While you (or your patrons) may make the initial loan request, Shortgrass staff are responsible for manually approving and managing interlibrary loan requests. This includes making requests to other libraries, managing requests made by other libraries to Shortgrass, and handling and shipping the physical items that are requested by non-Shortgrass libraries.

The life cycle of an interlibrary loan request looks like this:
1. You (or your patron) places a request on an item to be borrowed from outside SLS.

2. Shortgrass staff manually check and approve the request to ensure that the desired item is available for borrowing elsewhere. If it is not, we will cancel the request. You will receive paperwork confirming that this has been completed.
3. The request is received by loaning libraries, who then must determine whether or not they are able to fill it. When making ILL requests, we generally try to request the item from all libraries who have it available for borrowing. If none of these are able to fulfil the request, it is returned to us as an "End of Rota", request, which means we must either find an alternate source for the item or cancel that request. We will always try to find an alternate location before cancelling a request.
4. When a library is able to loan us an item, they will confirm the request for us on VDX and we will be notified that they will be fulfilling the request. Depending on where the item is coming from, it generally takes between 1-3 weeks for items to be received by you.
5. When you receive the physical item, you will need to notify the loaning library. This can be done in VDX.
6. The item can now be checked out to the borrower.
7. When the patron returns the item to your library, you must again process it in VDX, this time as a return.
8. Send it back to Shortgrass. We will return it to the loaning library for you.

Please see the interlibrary loan section of the Procedures Manual (beginning on page 26) for a detailed explanation of how to process interlibrary loans.

Reciprocal Borrowing

Reciprocal borrowing refers to agreements that allow patrons to borrow materials from libraries other than the one they belong to. These agreements help to ensure that all patrons have more equitable access to library materials, regardless of the size of their own library. Please note, however, that due to licensing requirements, these agreements typically do not extend to e-Resources, including eBooks/eAudiobooks and tools like Ancestry or online courses.

Shortgrass Library System cardholders are able to borrow items from other libraries within Shortgrass, from Medicine Hat College, and in fact from other libraries all over Alberta. Similarly, with the proper borrowing privileges, users from outside Shortgrass are also able to access library services at Shortgrass libraries. This section details how reciprocal borrowing works both within the system and outside it.

Shortgrass Library System Borrowing

Patrons from all Shortgrass member libraries have borrowing privileges from all other Shortgrass libraries This means that a patron who has a library card issued in Brooks is also able to visit the Irvine or Foremost libraries -- or vice versa -- and use it to check out materials.

Shortgrass also has a shared catalogue, meaning that all items held by all member libraries are able to be found and have holds placed on them by all library patrons.For library staff, this means that you will often find yourself placing holds on materials from other libraries in the system (or show patrons how to do this themselves in Bibliocommons!). It also means that you will need to regularly send materials from your library to other libraries within Shortgrass. This is done via the regular delivery van run; for more information, please refer to the "Deliveries" section of this manual.

Please note that borrowing between Shortgrass member libraries is not considered to be an "interlibrary loan" and should not be treated as such. Any materials requested from another SLS library via our interlibrary loan system will be cancelled.

Reciprocal Borrowing with Medicine Hat College

Shortgrass has a reciprocal borrowing agreement with Medicine Hat College (MHC). MHC Library users are able to register their card for use at Shortgrass member libraries, and Shortgrass card holders are able to use their card to borrow items from the College Library locations. This reciprocal borrowing agreement does not apply to e-Resources provided by either organization.

1

Adding College Patrons to SLS

In Workflows:

- In Display User, search for the patron's name (Type: **Keyword**. Index: **Name**. Library: **SGGROUP**)
- **If the patron is not in the system**
    - o Go into User Registration.
    - o Select SGMEDMHC from the Profile Name drop down menu. This will generate a free membership.
    - o Scan the barcode on the patron's MHC card
    - o Ask for ID. If their only ID has an out of town address, accept their local address verbally and enter their permanent address in the Address 2 area.
    - o Explain
        - ▪ Shortgrass items can be returned to the College library.
        - ▪ The College library (Medicine Hat or Brooks Campus) can be selected as a pick-up location for Shortgrass holds in both Workflows and Bibliocommons. (In Workflows, choose SGMED2 for MHC Medicine Hat or MHIMC for MHC Brooks.)
        - ▪ Orient patron to Bibliocommons, and explain that s/he will need to register in Bibliocommons in order to place holds and select a College pick-up location.
        - ▪ Give bookmark with PIN and current program guide.

- **If the patron is in the system**
    - o **If the Shortgrass card is expired**, use the existing record.
        - ▪ Go into Modify User to make changes to the patron's existing record.
        - ▪ In the Basic Info tab, scan the patron's MHC barcode in the User ID field and change the profile name to SGMEDMHC.
        - ▪ Update the patron's address information. If the patron has a local address in addition to a permanent address, enter their permanent address in the Address 2 area.
        - ▪ Go into Display User to make sure that fines and charges have been paid.
        - ▪ Back in Modify User, go into User ID Manager and move the old MHPL barcode to Discard.
        - ▪ 'Explain' as above.

    - · **If the Shortgrass card is current**, ask if the patron wants to continue to use it within Shortgrass. (We cannot have both an active Shortgrass card and a registered MHC card in Workflows.)

- o If the patron has a current Shortgrass card and wants to continue to use it, update information. Do not register the MHC card. It will function only at the College.
- o If the patron has a Shortgrass card and wants to activate the MHC card so that it works in Shortgrass
  - ▪ Go into Modify User to make changes to the patron's existing record.
  - ▪ In the Basic Info tab, scan the patron's MHC barcode in the User ID field and change the profile name to SGMEDMHC
  - ▪ Update the patron's address information. If the patron has a local address in addition to a permanent address, enter their permanent address in the Address 2 area.
  - ▪ Go into Display User to make sure that fines and charges have been paid.
  - ▪ Back in Modify User, go into User ID Manager and move the old MHPL barcode to Discard.
  - ▪ 'Explain' as above.

Borrowing from Medicine Hat College

Shortgrass patrons wishing to borrow items from either the Medicine Hat or Brooks MHC library locations should present a valid (non-expired) Shortgrass library card to MHC library staff. They should also be prepared to show proof of address.

Their barcode will be added to the College library system and they can place holds on items they find in the MHC catalogue. The College does not use PINs, so all that will be required for placing holds is the user's name and barcode. When placing a hold, users should ensure they choose the correct Shortgrass library for their items to be shipped to.

For more information about borrowing materials from Medicine Hat College Library, users should speak to college library staff.

ME Libraries

Shortgrass libraries participate in the ME Libraries program. ME Libraries is a web-based service that allows customers with a library card from a participating library to create an account with and access the physical collections at all other participating libraries. Interested customers complete a self-service web form to create an account with libraries other than their home library. This allows them to use their home library card as their library card at any participating library they have registered with. All items must be picked up at the owning library but can conveniently be returned to any ME library.

3

Patrons with valid library cards can visit http://melibraries.ca and follow the registration prompts to sign up for the free service.

ME Libraries does not apply to e-Resources/digital content or interlibrary loans. Users should contact their home library to use these services.

ME Libraries is a free service for those with a valid library card. However, users are still responsible for late fees and other associated fees and costs (i.e., if an item is missing or damaged).

4

Deliveries

Shortgrass Library System facilitates the delivery and movement of items throughout the system with a regularly scheduled van delivery service. Generally, anything that needs to be moved between Shortgrass HQ and your library (or vice versa), or between your library and other libraries within Shortgrass, can be sent via the regular delivery run.

Every library receives van delivery service at least once per week, with larger libraries on the rotation twice per week. MHPL receives deliveries every day. Additionally, there are two deliveries per week to Medicine Hat College and Medicine Hat College Brooks Campus. Shortgrass also delivers Praxis Science kits to some school libraries. You may see these be shipped through your library location and a school staff member may pick them up.

Examples of items that can and should be delivered to you or sent via the van delivery include:
- Purchased materials
- Items borrowed by patrons at another Shortgrass member library
- Interlibrary loans (to be sent outside of our system)
- Programming kits

Delivery Schedule

The full delivery service schedule (including stops for MHC locations and the government courier) can be viewed at: https://shortgrass.ca/services-for-libraries/resource-sharing/deliveries. For member libraries, the schedule is as follows:

Monday:	**Tuesday:**	Redcliff
Medicine Hat	Medicine Hat	Graham
Redcliff	Bow Island	Brooks
Graham	Foremost	Rosemary
Tilley		Duchess
Rolling Hills	**Wednesday:**	Bassano
Brooks	Medicine Hat	Gem
Alcoma	Irvine	
		Friday:
	Thursday:	Medicine Hat
	Medicine Hat	Bow Island

Drivers will generally arrive at the same time each week. If there must be any changes to the schedule, Shortgrass staff will do their best to let you know in a timely manner.

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In the event that a delivery is missed (e.g. due to a holiday closure or inclement weather), it will generally be made up on the following regular work day.

Delivery Procedures

In order for the delivery service to operate as smoothly and efficiently as possible, we ask that member libraries take the time to prepare materials for deliveries in advance of the drivers' arrival. Drivers must already handle and sort items while they are en route, and appreciate the time you take to help make this process easier. By working together, we can ensure that all materials reach their final destination swiftly and accurately.

Materials for delivery are shipped in **large red bins**. You will receive items in these bins with each delivery, and fill them with items you are shipping out each week.

Courier Bags:

Shortgrass has supplied all member libraries with red courier bags (and destination tags) for shipping items between libraries. The bags should be used as follows:

1. Place all items going to the same library in the same bag(s). **Only items going to the same destination should be placed in the same bag.**
2. Place one of the supplied destination tags into the clear address pocket on the front of the bag. This helps our drivers sort items more easily on the road.
3. Place the full bag into your general Shortgrass bin, which will be given to the drivers on your delivery day.
4. Repeat as necessary for all of the items you are shipping out.

If you require more bags or destination labels, please request more from Shelley at Shortgrass by emailing shelleyg@shortgrass.ca. If you find yourself with a large number of bags stockpiled, please send some back to Shortgrass.

For your reference, the courier bags look like this:
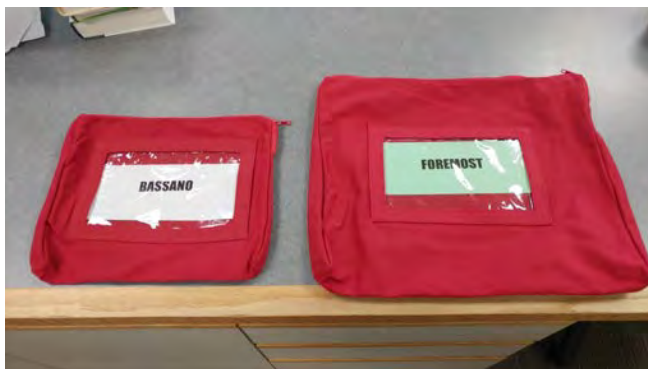
Other Items:

Some materials (e.g. programming kits and laptops) have their own containers or are too bulky to fit in the bins. If you are shipping these items, ensure that they are accurately labelled and prepared for shipping along with the rest of the materials being sent in the delivery.

When you are preparing your items for delivery, please do the following:
- Sort and clearly label items being sent to other libraries WITHIN Shortgrass
- Sort and clearly label items being sent to libraries OUTSIDE of Shortgrass (interlibrary loan materials)
- Sort items and clearly label being sent to Medicine Hat College Libraries
- Ensure any interlibrary mail is placed in an inter-office mailing envelope and correctly labelled with the recipient's name and location, e.g. "Stacey Pahl, SLS HQ"

Delivery Problems

If there are problems with your deliveries (e.g., missing or damaged items), please let Petra at Shortgrass know and we will do our best to rectify the issue.

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Library Organizations and Associations

There are a number of national and provincial library organizations that library workers may come across through their library work. Some are government bodies and have the power to impact library services in your community, while others are professional organizations you may wish to join and participate in.

Public Library Services Branch (PLSB), Government of Alberta

PLSB is the branch of the Alberta Ministry of Municipal Affairs responsible for public library services at the provincial government level. They provide a variety of library support services and expertise to public libraries and library boards across the province, including:

- Providing consultative support to over 200 municipal and intermunicipal library boards and seven library system boards established under the *Libraries Act* in areas related to legislation and management of public library service.

- Delivering orientation programs for public library trustees.

- consulting with staff and trustees of municipal and system boards on planning and policy development for municipal boards and regional service delivery at the library system level.

- Developing financial policy and delivering Public Library Board Operating Grants to help public library boards in the provision of library service.

- Collecting and publishing provincial public library statistics which provide a summary of library funding and performance indicators for all public library boards.

- Supporting Ministry initiatives including the annual Minister's Awards for Excellence in Public Library Service.

- Funding access to the National Network for Equitable Library Services (NNELS) and the Centre for Equitable Library Service (CELA), which provide library services for patrons with print disabilities.

- Funding and supporting the TAL Online catalogue, which allows Albertans to search the catalogues of all public libraries (and most academic ones) in the province at once and place requests on materials not available at their local libraries

- Funding and supporting an interlibrary loan system, ~~VDX,~~ that automates the processing of interlibrary loan requests.

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- Facilitating delivery of interlibrary loan materials across the province through the Alberta government courier service.

- Facilitating public library access to the SuperNet, a Government of Alberta initiative that enables access to secure, stable, high speed internet in public institutions.

- Providing province-wide equitable access to various eResources.
  Learn more: https://www.alberta.ca/public-library-services-branch.aspx

The Alberta Library (TAL)

The Alberta Library is a province-wide consortium serving 48 member libraries at 300+ service points in Alberta, including public, academic, and special libraries. By working together in this way, TAL allows Albertans at even the smallest libraries to access more than 30 million resources.

Services provided by TAL include:

- TAL Online: A discovery service that allows users to find resources (print and digital media) in libraries across the province, as well as place interlibrary loan requests for them.
- TAL Card: Provides borrowing privileges at all TAL Card participating libraries across Alberta.
- Licensing: TAL negotiates licensing agreements so that member libraries are able to provide access to digital resources like newspapers, magazines, eBooks, databases, and more.
- Library Toolshed: A joint venture between TAL and the Association of B.C. Public Library Directors, the Toolshed is an online platform for share and download library training resources. Visit: https://librarytoolshed.ca/ for access.

Learn more: http://thealbertalibrary.ca/

Library Association of Alberta (LAA)

The Library Association of Alberta is the major professional organization for librarians, library technicians, library trustees, institutions, and other library-adjacent personnel and groups in Alberta. It provides a space and voice for library workers to discuss issues, voice concerns, grow their networks, and access professional development opportunities. They are responsible for organizing and hosting the biggest annual professional development event for Alberta library workers, the Alberta Library Conference (ALC), which is held in Jasper every April.

LAA membership allows library professionals to access professional development opportunities (including ALC and other events throughout the year), grow their networks, and be a voice for

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libraries in the province through participation on the LAA's Board of Directors and various committees. Membership rates are on a sliding scale based on your income.

Learn more: https://www.laa.ca/

Alberta Association of Library Technicians (AALT)

The Alberta Association of Library Technicians is the major organization representing library technicians in Alberta. Its main goals include addressing the professional development, networking, and educational needs of its members; ensuring high educational standards for library technician programs in Alberta; and interact with other organizations in the library and information field. They are responsible for organizing and hosting the annual AALT Conference, which is held in various locations around Alberta and is intended to provide professional development and networking opportunities to technicians working in various sectors and types of libraries.

AALT membership is a great way to access professional development opportunities (including workshops and the annual conference), grow your network, and be a voice for issues affecting library technicians in Alberta.

Learn more: https://aalt.org/

Alberta Library Trustees' Association (ALTA)

ALTA represents the library boards and trustees that govern public libraries across Alberta. It is the collective voice for library trustees across Alberta and promotes effective library service and leadership through training, resources, communication, and advocacy. They actively support trustees to become strong leaders in their library communities and strive to ensure that all library trustees have access to the information, resources and education they need to be effective and strong leaders within their library communities. ALTA supports professional development opportunities for its members in a variety of ways, including workshops and online education, a regular newsletter, and special ALTA-hosted events, as well as specific learning and networking opportunities at general PD events like the Alberta Library Conference.

ALTA membership is a great way for library trustees to grow their expertise and networks in Alberta's library community. Membership is open to current and past trustees, and fees operate on a sliding scale, depending on the size of the community served by a library.

Learn more: https://www.librarytrustees.ab.ca/

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Canadian Federation of Library Associations (CFLA-FCAB)

CFLA-FCAB acts as the united, national voice for Canada's library communities. They work to: advance library excellence in Canada; champion library values and the value of libraries; and influence national and international public policy impacting libraries and their communities. CFLA-FCAB represents both library staff and library trustee organizations from various sectors nationwide, including public, academic, school, research, and special libraries.

Learn more: http://cfla-fcab.ca/en/home-page/

The Partnership

The Partnership is Canada's national network of provincial and territorial library associations. The organization meets twice a year to collaboratively develop services and programs for members of their respective organizations. Some of their initiatives include the Job Board (for library job postings in Canada), the Education Institute (continuing education for library workers), and an academic, peer-reviewed journal about library work and research in Canada.

Learn more: http://www.thepartnership.ca/

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Professional Development and Training

Regularly participating in professional development (PD) and training opportunities is an important part of library management. Doing so will help you gain the knowledge and skills necessary for providing excellent library services to your patrons.

There are a variety of both paid and free options available to you for to engage in professional development, including conferences, the biennial Shortgrass-sponsored PD Day, managers meetings, local training events, webinars, online courses, and more. Whenever possible, Shortgrass will try to make you aware of such events, but do not be afraid to seek them out on your own.

Regular Conferences and Training Days

Shortgrass Library System Professional Development Day. Sponsored by Shortgrass and held every two years, this one-day event is an excellent opportunity for you to gain knowledge and develop new skills close to home. This is a great event for library managers, staff, and board members to learn alongside their peers. Shortgrass invites a variety of speakers to share their knowledge of library and library-adjacent topics, including library accessibility, Indigenous library services, effective board leadership, library programming, collections management, general workplace management, and more.

Southern Alberta Library Conference (SALC). An annual two-day event hosted by Chinook Arch Regional Library System in Lethbridge. This is an excellent opportunity for southern Alberta library workers who are interested in a bigger conference experience without having to travel long distances or incur large expenses. The target audience for this conference is typically rural library staff and board members, and many of the conference sessions are directly applicable to these groups. This cozy conference is also perfect for networking with those who work in libraries of similar scope and size to your own.

For more information, visit: http://salc.wildapricot.org

Alberta Library Conference (ALC). The annual conference hosted by the Library Association of Alberta. This event is held each year at the Jasper Park Lodge and draws library staff, board members, and library-adjacent participants from all over Alberta, Saskatchewan, British Columbia, and northern Canada. ALC boasts a large number of sessions on a variety of topics pertaining to public, academic, and special libraries, as well as special events encouraging networking with your peers. This is a great conference, but the long travel distance and relatively high cost of attendance must be considered. Many of the sessions delivered at ALC are also available to you elsewhere, either at other conferences and PD events during the year or through webinars.

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For more information, visit: http://albertalibraryconference.com

Alberta Association of Library Technicians (AALT) Conference: The AALT conference is held annually in various locations around the province. This conference is aimed especially at library technicians working in schools, academic, and public libraries, though it is open to anyone who wishes to attend. It offers sessions, workshops, and networking opportunities that will help you develop your skills and meet library technicians from across the province. The AALT conference is usually smaller in size and more affordable than ALC, making it a great PD opportunity.

For more information, visit: https://aalt.org/

Webinars and Online Courses

Webinars and online courses are an effective tool for engaging in regular professional development at low or no financial cost and a lower time commitment than, say, conferences or onsite classes. Webinars are available on a variety of topics and are an especially great way to stay current on emerging trends in librarianship, including new technologies, programming ideas, collection development, and more.

Information on upcoming webinars and courses can be found in a variety of places:

- **The Education Institute**: a continuing education service for library workers maintained by The Partnership (a national network of Canadian library associations). This service is an excellent resource for webinars and courses on topics pertaining to Canadian libraries; however, please be advised that the majority of these are are paid, ranging from between $20-$55 per webinar. Visit thepartnership.ca for more info.
- **Marigold Library System Professional Development Newsletter:** Delivered monthly, this newsletter always contains a wealth of information about professional development topics, including links for upcoming webinars. You can subscribe to this newsletter at: https://libraryaware.com/472/Subscribers/Subscribe?optInPageId=b3d05855-ef19-4575-afd7-780b114d6049
- **CharityVillage:** While not library-specific, Charity Village offers webinars and courses aimed at Canadian nonprofit organizations. Many of these are free and on-demand (i.e., can be accessed as needed and not only at a specific time). Topics include applying for grant funding, board development, volunteer management, and more. Visit charityvillage.com for a full, updated listing of currently available and upcoming webinars. Visit: charityvillage.ca
- **Gale Courses**: Free, online, six-week courses that you already have access to via Shortgrass. The many management, nonprofit, and business-focused courses will help you develop the skills you need for more effective library management. Potentially relevant courses include "Fundamentals of Supervision and Management", "Managing Customer Service", and "Business Finance for Non-Finance Personnel". Gale Courses

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can be accessed via your own library's website, and are found by navigating to the "Online Courses" section of the Books and More header tab.

In-Person Events

Periodically, you may wish to participate in in-person professional development events, including workshops or courses.

- **Shortgrass-sponsored training:** When applicable, Shortgrass may choose to offer professional development training to member library managers. This training will often take place at Shortgrass managers meetings and cover a variety of topics. Recent training has covered such topics as accessible library services, grant funding options, and board relationships. Training may also be provided by Shortgrass staff as needed.
- **Courses and workshops.** You are encouraged to explore professional development options available to you through local educational institutions. Medicine Hat College, for example, periodically offers short courses, workshops, or certificates in topics potentially pertinent to your professional growth, including human resources management, occupational health and safety, and leadership.

Presenting at Conferences and Events

Have you come up with a really fantastic program this year? Worked together to build a new community partnership that you're really proud of? Consider sharing your ideas with the world by presenting at one of the above events!

Conference presentations can take a variety of forms, including 10-15 minute "lightning" talks, poster sessions, and full-length, (45 minutes to an hour) presentations. Depending on your topic and comfort level with public speaking, one of these may be more desirable than another.

Generally, a call for presentation proposals will be made a few months in advance of a conference. You will usually be asked to submit a brief description (100-250 word) of your presentation topic, as well as a short personal bio. Once your submission has been reviewed, you will be notified as to whether you have been selected. If it's a yes, start preparing!

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Procedures Manual and Training Resources

Last updated: July 4, 2019 by Samantha West, Client Services Librarian

Basic WorkFlows Procedures
Contents

Accessing / Logging into WorkFlows

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How to Renew a Patron's Privilege

How to Change a Patron's Address or Other Information

How to Place a Hold on an Item

Daily Hold Pickup Lists

Accessing / Logging into WorkFlows

1. You can open WorkFlows by double-clicking the WorkFlows icon on the desktop.
2. When you open WorkFlows, the first thing you will see is the "Configuration" box with host and workstation information. Click OK when this box pops up.The Login box will appear next, the User ID and PIN for your Library are as follows:

   - o User ID: _ _ _ _ _ _
   - o PIN: CIRC
3. WorkFlows will now open.
4. When it appears on the screen, ensure that **Public Circ** is selected in the top left-hand menu bar.

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Registering a New Patron

1. From the left-hand menu, open the **Users** wizard group and click **User Registration**.

2. The **User Registration** box will appear

a.   Select the appropriate Profile Name

  i.   **SG_____ – General Membership**

b.   Scan the patron's barcode.

3. The "User Registration" screen will now appear. There are several tabs and you need to click on several in order to record the patron's information:

a.   **Basic Info Tab:**
    i.   Record the patron's first name & last name. Double check that the Library is set to SG____ and update if it is not.

Double check that the Profile name is the same one that you selected earlier.

Figure 2: Basic Info Tab / User Registration Screen

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b.   Privilege Tab:

      i.   Make sure the expiration date is correct.

      If you need to change the expiration date, click the diamond shaped 'gadget' button next to the date and select a new one from the calendar that pops up. If you change the date, you will need to enter the override password in the override box (password is SPRING)

      ii.   A PIN will be automatically generated.

      Ask the user if they wish to change the PIN to something else – if so, then enter the new PIN into the box. The user will need the PIN number to log into his/her library account and to access eBooks and other electronic resources.

c.   Demographics Tab:

      i.   **User cat1**: Select the patron's city or region from the dropdown box. i.e. GEM

      ii.   **User cat2**: Select patron's demographic from the list i.e. CHILD, ADULT, SENIOR, etc.

      iii.   User cat3: Select patron's gender from the list

      iv.   Birth date: Click the diamond gadget   button and select the user's birth date from
           the calendar that appears. Click OK when you are finished.

Figure 3: Birth Date Selector

d.   Address Tab:

There are 3 Address fields, but Shortgrass only uses **Address 1**.

i.   Fill in **STREET, CITPROV, POSTALCODE**, fields.

Also fill in **PHONE** and **EMAIL** fields if information is available.
See example of how this will look below:

Figure 4 A Complete Address Entry
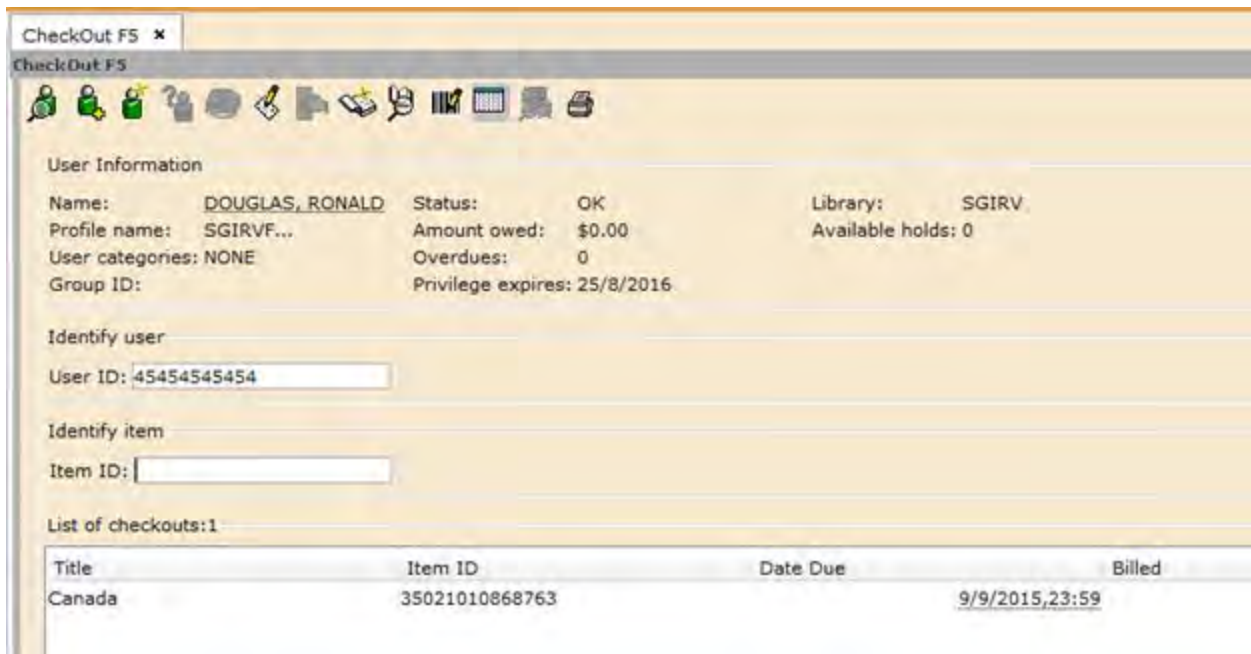
e.   Extended Info tab:

i.   NOTE: This is an optional field that your library can use. Anything you enter into a note field will appear on the checkout screen later. For example, if a patron left her card at the library, you could record a note that says "Patron left card on shelf. Put it in staff room filing cabinet with her name on it / Aug 14, 2015".

ii.   NOTIFY_VIA: You must enter one of the following three notification options:

1.   PAPER: Patron will not be notified when holds arrive

2.   EMAIL: Patron will receive an email when holds arrive

4. When you are finished entering the patron's information, click the "Check Duplicate User" button at the bottom of the screen. The system will look to see if this patron already exists in the database. If the patron already exists, that information will appear on the screen. If there are not duplicate users, you can then click the Save button at the bottom of the screen to register the patron.

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How to Check Out an Item

1. Under the "Common Tasks" wizard group, click "CheckOut F5"

2. Scan or type in the patron's barcode number under the User ID field

3. Scan or type in the item barcode number under the Item ID field

4. Checkout details will appear at the bottom of the screen and will show a list of titles, Item ID numbers, and due dates

Figure 5: The Checkout Screen with Completed Checkout Listed at the Bottom

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How to Check In an Item

1.   Under the "Common Tasks" wizard group, click "CKI / Discharge F3"

2.   Scan the item barcode or type in the barcode number under the Item ID box

3.   The item will be checked in. Any accrued fines will appear on the screen.

      a.   If it is an Irvine item and there are no holds on it, nothing further will happen.
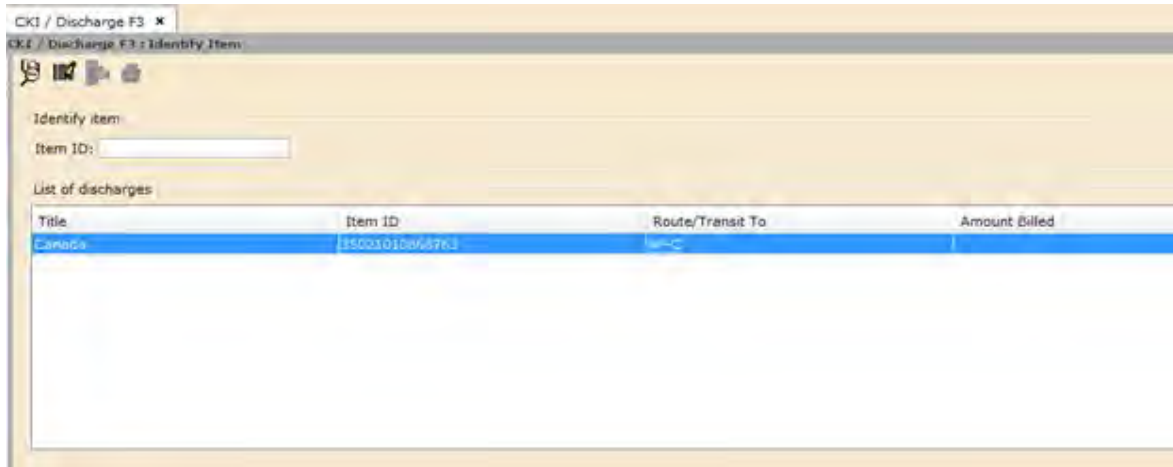
Figure 6: An Irvine Item that was checked in. There are no holds on it, so no further action is required.
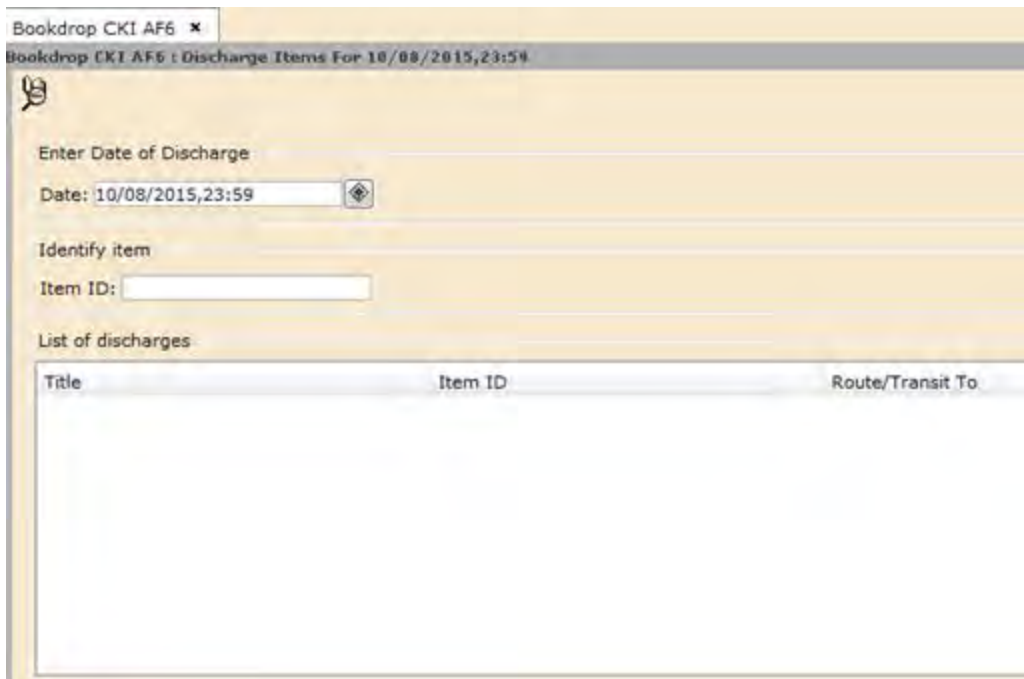
      b.   If the item belongs to another library, or if someone at another library has a hold on the item then it will be placed "In Transit" to that library, and you must mark it for the Shortgrass driver to pick up on the next delivery date.

Figure 7: This Item was Checked In and Needs to Go to Another Library - Shortgrass HQ in this Case.

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How to Check In Book Drop Items (Backdated Check-Ins)

1.   Under the "Common Tasks" wizard group, click "Bookdrop CKI AF6"

2.   Under "Enter Date of Discharge", click the diamond gadget button and select a check-in date from the list.

3.   Scan the item barcode or type the barcode number under the Item ID field to check in the item

Figure 8: The Bookdrop CKI Screen

How to Renew a Checked-Out Item

1.   Under the "Common Tasks" wizard group, click "Renew by User F7"

2.   Scan the user's barcode or enter the number. You can also search for the patron by name via the User Search icon in the top-left corner:

   a.   You can search for the user by name, email, or various other fields. Once you locate the user in the list, highlight his name and click "Renew Items for User" at the bottom.

3.   Under the "Renew" column, check the box next to the item(s) you wish to renew. Then click the Renew Selected Items button at the bottom.   If the item can be renewed, then the new due date will appear on the screen.

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How to Pay a Bill on a Patron's Account

1. Under the "Common Tasks" wizard group, click "Paying Bills"

2. Scan the user's barcode or enter the number. Alternatively, search for the user via the User Search function (explained on page 7).

3. A list of the user's bills will appear on the screen. You can make a lump sum payment by entering an amount and payment type under "Total bills and payments" or you can pay a specific bill by entering an amount and payment type on a particular line item under "Individual Bills and Payments". Once this is entered, click the Pay Bills button at the bottom to pay the bill.

    a. Most libraries just use the CASH payment type, unless the fine is being waived. In those cases, select Waived-Del from the list

Figure 10: The Paying Bills Screen

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How to Renew a Patron's Privilege

1.   Under the "Users" wizard group, click "Renew Privilege"

2.   Scan the user's barcode, enter the number, or search for the user via the User Search feature (explained on page 7)

3.   Click the extend privilege button at the bottom to renew the membership for 1-year from today's date. A confirmation box will pop up and display the new expiry date.
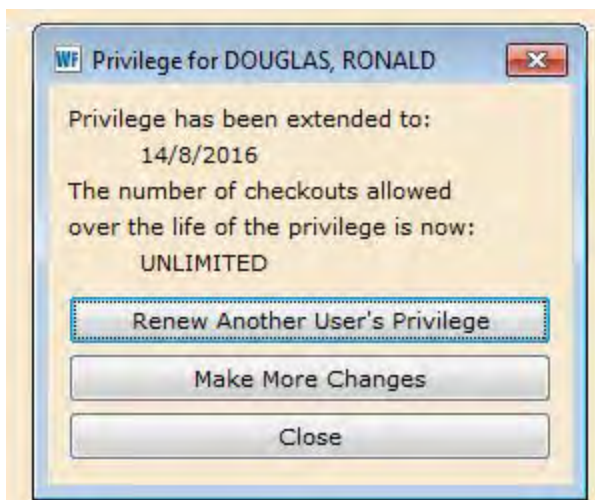
Figure 11: Renewal Confirmation Box

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How to Change a Patron's Address or Other Information

1.   Under the "Users" wizard group, click "Modify User"

2.   Scan the user's barcode, enter the number, or search for the user via the User Search feature (explained on page 7)

3.   You will be brought to a screen that is very similar the user registration screen. Change information as required and click the Save button at the bottom when you are done.
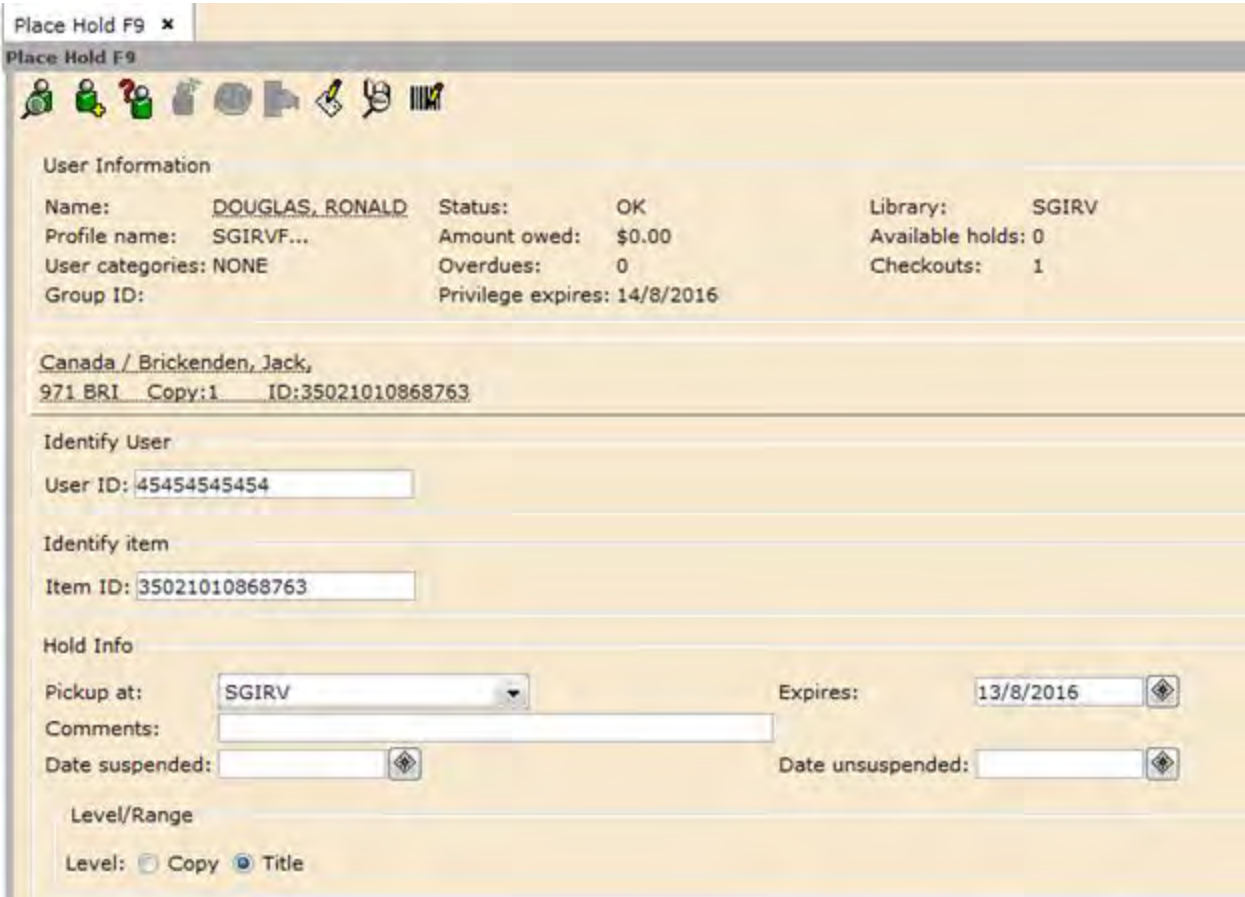
Figure 12: Modify User Screen

How to Place a Hold on an Item

1.   Under the "Holds" wizard group, click "Place Hold F9"

2.   Under Identify User, scan the user's barcode, enter the number, or search for the user via the User Search feature (explained on page 7)

3.   Under Identify Item, scan the item barcode if you have it or click the Item Search icon at the top to find the item:

4.   Click the "Place Hold" button at the bottom of the screen

Figure 13: Place Hold Screen

Daily Hold Pickup Lists

1.   The "List Onshelf Items with Holds" report runs twice daily (7:15 am and 4:00 pm) and will be delivered via email to the account you have designated for this. You must retrieve the items appearing on the list from your shelves and check-in each one which will switch the item status to "in-transit".

*In the event that an item cannot be sent, please email the requesting library.

Library Notice   Inbox   x

?   Your Public Library <sirsi@sirsi-shortgrassp.chinook.chinookarch.ab.ca>
      to

                      CLEAN HOLD SHELF LIST

                Produced Wed Nov 23 05:30:15 2016

                      Library:

616.89145 HAR
    Harris, Thomas A. (Thomas Anthony), 1910-1995
    I'm OK-you're OK / Thomas A. Harris
    location:INTRANSIT   item ID:35021008150877   item type:SGBK

BAN
    Shuman, Jason
    Bangkok dangerous [videorecording]
    location:INTRANSIT   item ID:35021011523490   item type:SGDVD

KEL
    Kelly, Karen
    Boxed in / Karen Kelly
    location:INTRANSIT   item ID:35021011102774   item type:SGBK

2.   As you check-in each item, record the receiving library on a piece of paper or sticky note and attach to the item. This will ensure the item will find its way to the correct library.

3.   Finally, place the item inside the red Shortgrass bin for driver pick up.

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How to Discard an Item

1.   Under the "Common Tasks" wizard group, click "CheckOut F5"

2.   In the User ID field, type in your UserID and DISC

3.   Scan or type in the item barcode number under the Item ID field

4.   Checkout details will appear at the bottom of the screen and will show a list of titles and Item ID numbers

5.   The items will be removed once a month to complete the discarding process

Ordering From United Library Services (ULS)

ULS Ordering Procedure: Member Library Staff
Revised: September 2015

INTRODUCTION

What is 9xx ordering?

9xx ordering allows library staff to select materials for ordering on https://www.uls.com

How does this apply to Library staff? What is the process?

The selector (library staff) places items they wish to order into a shopping cart, chooses the holding codes and funds and when he/she is done shopping, clicks on the checkout button to transfer this information to Shortgrass Acquisitions staff.

What happens after the order has been placed?

Shortgrass staff downloads the brief bibliographic records and holding information to Symphony WorkFlows by running a couple of reports. The funds and holding codes are then double checked and materials are ordered electronically from ULS. When the material arrives at Shortgrass, it is then received, catalogued, processed, and delivered via van delivery to your library.

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SEARCHING TECHNIQUES

There are 2 ways to search items on the ULS website.

A) Browse selection lists created by ULS
B) Search for specific item through the Quick Search or Advanced Search

A) Browse the Selection List

1) If you want to browse the lists provided by ULS, click "Selection Lists" at the top of the screen.

2) In this example, we picked the "Alberta Social Studies" Selection List, chose the 3rd item, changed the quantity to 1, and using the drop down window, we selected the appropriate Sonata Template (fund and holding code i.e., SGMEDC-SGMEDNFBKC). Finally, we clicked "Add to Cart".

3) ULS creates a default shopping cart for you called "My Cart". If you wish, you can create a new cart with a custom name. To do this, click the dropdown next to "My Cart," click "Create New Cart," and then enter a name for your cart.

4) If you wish to order 2 copies with different funds and holding codes: first, using the drop down window, choose Sonata template (fund and holding code) for the first item, quantity and ADD to cart. Then, using the drop down window, click on the next Sonata template, quantity and ADD to cart.

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B) Search for specific item

1) Quick search or advanced search is located at the top of the screen. We can search by title, author, or ISBN. In this example, we type in "Alberta" and click "Search".

2) On the Quick Search Results list, you can choose the item you want to purchase.

3) Click and choose the appropriate Sonata Template (fund and holding code) by using the drop down window, enter your quantity and click ADD to cart, like the example below.

4) If you wish to order 2 copies with different funds and holding codes: first, using the drop down window, choose Sonata template (fund and holding code) for the first item, quantity and ADD to cart. Then, using the drop down window, click on the next Sonata template, quantity and ADD to cart.

COMPLETING YOUR ORDER

1) Once you have completed your order, click on View Carts in the top-right corner of the screen and then click on the cart name for the order that is ready to submit.

2) You will be brought to a new screen listing all of the items in your cart. Double-check the quantities and the Sonata templates to make sure they are correct. When you are ready to submit your order, click "Proceed to Checkout" in the bottom-right corner of the screen.

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3) A page will appear that says "You cannot submit your order directly to ULS". Select *SLS Acquisitions* from the dropdown menu and click the "Transfer Cart" button at the bottom to send your order to Shortgrass. You can use the comments box to send a special message to Shortgrass re: your order.

a.   **MHPL staff**: you must submit your order to your supervisor instead of *SLS Acquisitions*. Select your supervisor's name from the dropdown menu and click "Transfer Cart" to do this.

HOTLIST SELECTION LIST ORDERING FROM ULS

1. **LOGIN TO THE ULS WEBSITE**: (**https://www.uls.com**)

    Use your email and password.

2. **CREATE A CART ON ULS**:

    a.   Click **Manage Carts** (top right of screen)**.**

    b.   **Enter the cart name using your Library's name + Hotlist** under Create a New Cart (left of the screen).

    c.   **Click Add.** You will receive confirmation when it's created.

3. **ORDER FROM THE ULS SELECTION LIST(S)**:

    There are 2 ways to do this.

    a.   **Search the ISBN from the paper catalogue** using the Quick Search box.

    b.   **Click Selection Lists** on the ULS website to view the selection lists.

    i.   **Click Hotlist First & Second Choice**

    ii.   The Hotlist Editions are listed across the top of the page with deadlines for submitting the order. **Make sure the most recent Hotlist Edition is selected**.

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The name of the hotlist you are viewing will be indicated in bold green font (highlighted below).

> 1. Hotlist Editions are listed from left to right, most recent to least recent.
>
> 2. To view different Hotlist Editions, click the blue selection list name.

iii. **Switch between the Fiction, Nonfiction and Second Choice lists, by clicking the blue list name** listed below the Hotlist Editions.

When viewing the Fiction list, you will see the option to click the Non-Fiction list (Image 1) and when viewing the Non-Fiction list, you will see the option to view the Fiction list (Image 2).

Image 1:

Image 2:

iv. Scroll through the list of selected titles, adding them to your cart.

4. ADDING ITEMS TO THE ULS CART:

a. **Scroll down and select your cart's name** (highlighted in the image below).

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b. **Click the down arrow next to "Choose Sonata Template"** and **select the holding code**.

c. **Enter the quantity** (i.e. 1) and **Click Add To Cart.**

d. **A confirmation message will pop up**, indicating the item has been added to the cart.

e. The quantity & total cost will increase in the top right region of the screen as you add items to the cart.

f. **Note:** ULS usually remembers the Sonata template and cart you are adding to, after you enter it the first time.

5. **COMPLETING YOUR ORDER:**

a. **View your cart by clicking on your cart's name** (top middle right of screen in green font)

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b. **<u>Double check the quantities and Sonata templates are correct.</u>**

c. When you are ready to submit your order, **click Proceed to Checkout** (bottom right of the screen).

d. A page will appear that says "You cannot submit your order directly to ULS."

e. **<u>Select *SLS Acquisitions</u>*** from the dropdown menu and **click Transfer Cart** to send your order to Shortgrass. You can use the comments box to send a message to Shortgrass regarding your order.

f. **Email Shortgrass Acquisitions** (acquisitions@shortgrass.ca) to let us know you've submitted a Hotlist Selection List cart on ULS.

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Procedures:
   Add ons and Fast Adds
   Interlibrary Loan Procedures

Interlibrary Loans and VDX training

(Source: VDX presentation held at Medicine Hat Public Library, 10.17.2016)

Outline

•Introduction to VDX

•Borrowing:

   –Life Cycle of a Request

   –Work Queue

   –Trouble?

   –Examples

•Lending

Important Documents and Resources

VDX Manual

Rota Codes for Alberta Libraries

Government Courier List

Canada Post Shipping Tool

http://www.illalberta.ca

http://www.talonline.ca

ILL Policy Directory
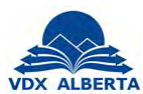
What is VDX?

•VDX is a web-based interlibrary loan software that enables library staff to:

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–Search multiple library catalogues simultaneously

–View the bibliographic and location details of any items retrieved

–Place a request for an item

–Manage the request through its lifecycle, from request to receipt to return

–Manage incoming requests from other libraries

How to Access VDX

•**Note: VDX is optimized to use Firefox or Internet Explorer. It does not work as well with Chrome.**

•**To access VDX go to: https://alberta.vdxhost.com/vdx/**

Avoid **saving your password when logging in:** New autofill/password saving features in all browsers may attempt to autofill your VDX login username and password into the patron authentication fields every time you go to authenticate a patron. However, this will be a problem in the requesting stage of the ILL process - and as such, it is not recommended. If you need directions on how to remove the memory for the saved password, please contact either through phone or email and we can walk through the steps.

Work Queue

•**The Work Queue gives you a quick view of all your active requests. It is the main tool you will use in VDX to manage your requests.** To access the Work Queue you click the Work Queue button on the menu bar at the left of the screen

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Borrower			Lender	
Status	Count		Status	Count
Idle	5		New Requests	0
Idle / Check Manual	1		New Requests Expiring Today	0
Idle / Auth Manual	3			
Pending > 2 weeks	36			
Pending	74			
End of rota	0			
Not Supplied	0			
Terminated	0		Will Supply	0
			Conditional	0
Informed Will Supply	0		Cancel Requested	0
Conditional	0			
Cancel Pending	0		New Notes	0
New Notes	0		Shipped	0
Shipped	54			
Shipped > 2 weeks	39		Renewal Requested	0
Received	200		Overdue Today	0
Renew Pending	0		Overdue > 4 weeks	0
Overdue	2		Recalled	0
			Returned	0
Recalled	0			
Returned	92		Circulation Queue	0
			Staff Review	0
Circulation Queue	0		**Reports**	
Staff Review	0		Pick List	0
Reports			Shipping List	0
Bureau - Chinook Arch ⌄			Lethbridge Public Library	

This is what the work queue looks like
The Work Queue page has a borrowing side and a lending side. Because Shortgrass headquarters takes care of many of the libraries lending, you should only see requests in the borrowing side.

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If you see a request appear on your lenders side, contact your HQ representative (Keltie) or just not supply it with a 'public note' suggesting they resend the request to Shortgrass HQ at AMS.

Life Cycle of a Request
There are 6 basic steps in the life-cycle of a request.

1.Create a Request (The first would be the creation of a request, either by you or by a patron using TAL Online.)

2.Status of Request (The second would be what I have called the "Status of a request", basically meaning we've submitted the request, and now are waiting to see if someone will lend it to us, or if it will go to "end of rota".)

3.Shipped!

4.Receive

5.Renew, Overdue, Recalled
The last four steps are much simpler, and are: Shipping (the lender has shipped you the material), received (You receive the item, and check it out to your patron), Renewing, Overdue, Recalled (These are requests that are currently out to you patron, but demand some action on.)

6.Returned
The final stage is when the item is returned by the patron, and you send it back to the owning library.

Where do requests come from?

1.VDX – Bib search

(This is a request that you have started by first searching for holdings within VDX, and then adding any missing information before sending it on.)

2.VDX – Blank Form

(There is no prior information to build from, and you must use a blank request page.)

3.TAL online – Patron initiated

(These requests are generally the standard for many libraries, except those with patrons who are accustomed to approaching library staff about creating requests.)

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VDX Bib Search

Find the Bib search page on the left menu bar, at the very top.

Search example:

Search: Deja dead / Kathy Reichs (Audiobook)

Narrow your search via the Filter (found under the Collections tab):

Filter results by: Format(s) [ie. Book, Book on Tape [Audiobook], Large Print Book…],
Language(s), Level(s)

▼ Format(s)
- ☐ Article Printed
- ☐ Print Journal
- ☐ Book
- ☐ Part of Book
- ☐ Ejournal
- ☐ Article Online
- ☐ Music CD
- ☐ Video DVD
- ☑ Book on Tape
- ☐ Book on CD
- ☐ Patent
- ☐ Thesis
- ☐ Report
- ☐ Large Print Book
- ☐ Braille Book
- ☐ Computer File
- ☐ CD-ROM
- ☐ OTHER

Select all Clear all

▼ Language(s)
- ☑ English
- ☐ French
- ☐ German
- ☐ Italian
- ☐ Spanish

Select all Clear all

▼ Level(s)
- ☐ Adult
- ☐ General
- ☐ Juvenile

Select all Clear all

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Result Details

Record **2** of **4**   Collection: Alberta - Strathcona County and Fort Saskatchewan   ‹ Previous Next ›

Save   Request

Title	**A deadly audio collection [audiobook cd] / Kathy Reichs.**
Format	Book on CD
Authors	Reichs, Kathleen J
Also Titled	Other title : Deja dead [audiobook cd] Other title : Death du jour [audiobook cd] Other title : Deadly desicions [audiobook cd]
Imprint	New York : Simon & Schuster, [2000?].
Description	14 compact discs (ca. 14 1/2 hr.) : digital ; 4 3/4 in.
Contents	Deja dead -- Death du jour -- Deadly decisions.
Performers	Read by Amy Irving and Katherine Borowitz.
Subjects	Brennan, Temperance (Fictitious character) -- Fiction. Forensic anthropology -- Fiction. Women anthropologists -- Fiction. Detective and mystery stories, American. Arson -- Fiction. Cults -- Fiction. Montreal (Quebec) -- Fiction. Quebec (Province) -- Fiction. Detective and mystery stories.
Other Authors	Irving, Amy Borowitz, Katherine
ISBN	9780743538558 WorldCat
Language	
Language	English

Holdings

	Location	Availability
🔍	Strathcona County Library	Checked In

‹ Previous Next ›

The request screen:

The record seems to indicate that this item is the desired title and format, as well as being available. This item will be requested.

Request Page

-ESSENTIAL ELEMENTS:
1) Authorization Status is : "To be Authorized"
   (Ensures VDX will attempt to build a Rota)
2) Double check the Item Format (Book, Audiobook)

Creating a Patron profile

If your patron hasn't done an Interlibrary loan and isn't entered into VDX system, you'll have to create a profile for them.

Creating a Patron

Creating a patron profile:

On the menu to the left of the screen, click on "user"

Once there, go to the menu on the top of the screen and select "Create"

Then enter in the relevant information.

The needed information is: Barcode, First and Surname, location, and category.

NOTE:

Re: The expiry date: DO NOT put in an expiry date, as this will cause problems in the future. If you have a user record that has an expiry date already filled in, set it a few decades from now***

Searching for a particular format:

Example 2: Searching for a irregular item: Large Print copy
Specifying the format from the "Advanced Search Page."

Results:

2 Collections were identified:

- Pick one record and select: "Request"

Example #2

Once selected, check that the:
- Authorization Status is :
  "To be authorized"

- The ISBN is present

- Make a further note of the irregular format by adding in (LARGE PRINT) after the title.

- Double check that the patron is Authorized and then select "REQUEST"

Appendix -- Facility Use Procedures and Guidelines
There are 3 categories of potential users of the facility
- SLS Board and staff
- SLS member municipalities and member library boards/staff
- Non-SLS agencies

SLS Board and Staff Use
Use by the Board and staff take precedence over other requests, provided appropriate booking procedures are followed.

Use by SLS Member Municipalities and Member Library Boards/Staff
Use by the above groups will be at no charge during business hours, except for coffee service.

If the facility is requested for non-business hours, then a charge of $50 per half day or evening may be necessary, plus coffee service fees. Room availability is dependent upon staff availability and CEO approval.

Use by Non-SLS Agencies
Use by the above groups will be at a nominal charge of $50 per half day during business hours. Coffee service will be available at an additional fee.

If the facility is requested for non-business hours, then a charge of $75 per half day or evening may be necessary, plus coffee service fees. Room availability is dependent upon staff availability and CEO approval.

Bookings
- All bookings must be made through the Executive Assistant.
- All users, other than SLS Board and staff, must complete the facility usage/rental agreement prior to use.
- Signers of rental agreement must be 18 years old or older.
- Facility will not be available on statutory holidays.
- No alcohol usage is permitted.
- Hours of use are at the discretion of the CEO.
- Cancellations of evenings and weekend bookings must be made at least two full business days in advance of the booking date. SLS reserves the right to apply full charges to renters who provide less notice.

Responsibility
- The user/renter is responsible for the due care of the facilities and contents.
- All young adults and children must be under supervision.
- If the user/renter will be advertising the event, then the following statement must be part of the advertisement.
    - Use of the SLS Board Room by a community group does not imply SLS endorsement of the aims and objectives of the group.
- The user/renter shall be financially responsible to the Board for all loss or damage to the facilities by any person(s) admitted to the facility by the user/renter.

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- The SLS supervising employee shall have the authorization to request that the renter vacate the premises due to inappropriate conduct or overstaying of time.
- The SLS CEO's decisions shall be final in all matters pertaining to the interpretations of these procedures and guidelines.

Additional Fees
Coffee or Tea at $5 per pot.

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