RIGHTSIZING THE ACADEMIC LIBRARY COLLECTION

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Introduction

IN 1956, MCGAW WROTE THAT THE LIBRARIANS OF HIS DAY "might conclude that we have plenty of time before we are faced with the problem of maximum size. But eventually that day will come" (McGaw 1956, 269). To say that that day is now upon us is an understatement. The stacks in many academic libraries have been bursting at the seams for years. Even when funding is available, adding new buildings, extensions, or storage facilities only postpones the inevitable. Despite the explosion in electronic resources and plummeting circulation of print resources, libraries still add thousands of items a year to their physical collections. In addition, many academic administrators are taking a close look at space on central campuses and concluding that increasingly deserted stacks space would be ideal, if cleared out, for a variety of other purposes.

We encounter the term *sustainability* more and more frequently in various aspects of our lives. In academic libraries, we know that many of our activities, both time-honored and new, are not indefinitely sustainable if based on traditional models of funding, staffing, and space. We are coming to realize that one of these activities in particular—building and maintaining local physical collections of a depth and breadth sufficient to support not only current

scholars but also future ones—is not ultimately sustainable for any but a handful of the largest research libraries. Most libraries cannot afford to buy all the scholarly output that they might like; even if this were not a challenge, they cannot continue to house and maintain gigantic physical collections of material that in many cases are both rarely used locally and are widely duplicated elsewhere. Clearly the time has come (if it is not already long overdue) for academic librarians to develop a new vision about their libraries' functions and services. One aspect of implementing that new vision requires making tough decisions about *whether*, as opposed to *how,* to retain large portions of their physical collections.

The increasingly electronic library of the twenty-first century offers myriad opportunities for introducing new services and activities. However, many of these new programs require space, and not just traditionally configured space filled with shelving and study carrels. Because creating new library space is difficult to justify, library administrators must proactively seek ways to reduce the footprint of physical material, especially when hundreds or thousands of previously acquired physical items have long histories of no- or low-use, were used when acquired decades ago but are now less relevant, or are in formats that have been superseded by electronic equivalents. In the recent past, the typical solution involved building a nearby storage facility for the little-used portion of the local collection, but today an expensive storage facility may not be the right answer for many libraries. What is the obvious solution? Weeding, withdrawing, discarding, deselecting, and deaccessioning: all words that make academic librarians shudder.

This book suggests the term *rightsizing* to describe the overarching plan for shaping a library's physical collection into one that meets its users' needs. Although many libraries face the necessity of an immediate large-scale retroactive print retention project, rightsizing is much more than just a massive weeding effort. Rightsizing includes not only the initial push to remove decades of obsolete material, but also ongoing and routine evaluation activities that keep a collection fresh and relevant. Further, rightsizing usually involves awareness of regional and consortial partners' needs to conduct these same activities, and employs a variety of collaborative approaches for collectively meeting users' occasional needs for older or less-used material. Rightsizing harnesses technology to create withdrawal candidate lists that take into account many variables to ensure that a library only removes no- and low-use titles easily obtainable from resource sharing partners, and retains scarce items and items of local importance. Rightsizing employs batch processing methods to minimize title-by-title reviews and to streamline operations. Rightsizing embraces the concept of preferring electronic resources over print ones for many or most new acquisitions, so that the challenge of burgeoning, and then aging, print collections does not continue into the future. Rightsizing also advocates

different approaches to some aspects of collection development, such as using patron-driven acquisitions models to add books as they are needed, rather than perpetuating the older model in which libraries buy titles that in many cases may never be used.

In the fourth edition of his book *Weeding Library Collections: Library Weeding Methods,* Slote wrote: "Every library consists of two distinguishable collections: the collection that is used, and the collection that remains unused." He called them the *core* collection and the *noncore collection*, and suggested that "once these two collections are identified, the following rule should be followed: No volume in the core collection should be considered for weeding. And, as a corollary of the above rule: All books in the noncore collection are candidates for weeding and probably should be weeded" (Slote 1997, 85).

Based on various studies that will be summarized later, most academic libraries have noncore collections of at least 40 to 50 percent. Excluding some protected classes of material (e.g., the institution's thesis collection), most of the noncore titles could be removed with "no effect whatsoever on user services. On the contrary, such straightforward action would dramatically improve service in ways that users actually value" (Lugg and Fischer 2009, 76). Although such an action would be extreme, especially for a research library, Slote's statement suggests that an initial rightsizing project should not cautiously nibble at a collection to remove a few obvious withdrawal candidates, but rather should take a proactive stand to withdraw tens of thousands of titles that have not been used recently, have a very low likelihood of ever being used again at that location, are widely held and easily obtainable elsewhere, and can disappear without affecting the overall collection integrity.

One of the major reasons why librarians now face the need to tackle huge rightsizing projects is that they have deferred for decades what should be routine periodic analysis and strategic withdrawals as an ongoing part of collection management. Instead, they built library extensions and storage facilities to house material that saw little use and was widely duplicated elsewhere. Many of these facilities are now at or near capacity. What is next in an era where claiming yet more storage space is a luxury few libraries can afford? This book discusses the reasons why libraries find themselves at this crossroads (or precipice, depending on the current situation in one's own library), reviews ways to rightsize the local physical collection (books, journals, microform, and more), and covers the various ways that libraries can participate in collaborative print retention projects.

Librarians well understand that some of today's outdated material will form tomorrow's foundation for historical scholarship. The problem, of course, lies in predicting which specific titles will form that foundation. The point is that not every library need maintain all the material, or even a significant portion of it, against the day when someone might need it. The vast majority of

titles are widely duplicated; as long as librarians act responsibly to ensure that enough print copies exist across a region for future resource sharing, they can withdraw their own library's unused copies with clear consciences.

One backhanded benefit of the profession's having deferred rightsizing activities for decades is that current technology now allows the examination of many more variables to help identify withdrawal candidates. No longer must each individual library weed in a vacuum or must staff physically touch every single piece during the decision-making process. Today librarians can easily compare local holdings across their consortium, region, country, and throughout the world to make data-driven batch withdrawal decisions based not just on local circulation figures, but also on factors such as the relative scarcity of some titles, the holdings of specific peer or partner libraries, full-text availability from a stable vendor, and many other factors. In fact, some groups of libraries now undertake joint book rightsizing projects, the better to ensure retention of an adequate number of working copies within the membership. The majority of deselection decisions can be made based on the results of carefully crafted withdrawal candidate lists, rather than from volume-by-volume inspection in the stacks.

This book advocates establishing an overarching vision for rightsizing a library's physical collection and helps librarians develop a systematic, rules-based approach for evaluating these collections and making decisions about what to retain and what to deselect. However, the book will also assist librarians faced with sudden and externally imposed deadlines for reducing their collection's physical footprint. Although the focus is on evaluating and acting on the entire collection, or at least large portions of it, librarians may find the suggested methods helpful even if they only want to work with a small subset of the collection.

This book also offers practical advice on possible approaches to these tasks. It will explore ways to minimize the need for title-by-title reviews by embracing batch processing methods whenever possible. Some tasks are relatively easy to manage in-house; others require cooperation with peers, and some might best be undertaken in partnership with a consultant. This book emphasizes the benefits of creating an overall plan for proactive physical collection downsizing; building internal consensus; encouraging buy-in from constituents like university administrators and teaching faculty; project management; options for disposal of deselected material; and collaborating with other institutions. It reminds the reader that although a large, initial rightsizing project meets today's pressing needs, rightsizing is also a routine process that should take place at regular intervals.

In addition, rightsizing is not just a process that a single library undertakes in a vacuum. "Care is needed and support must be provided to ensure that libraries . . . do not make mistakes and withdraw materials that should be retained" for the greater good of the scholarly community at large (Demas and

Lougee 2011, 1). Many of the libraries tackling local rightsizing projects now will later participate in upcoming large-scale print management projects coordinated by the consortia to which they belong, and thus must take care to keep scarce works and stand ready to contribute to bigger projects in the future.

This book tries to separate discussions of books and journals. They are very different types of material; rightsizing decisions about them involve different factors and considerations. In addition, many libraries handle these separately rather than simultaneously when they rightsize. However, this separation is not always possible. Therefore, the discussion about collaborative print options covers joint storage facilities and distributed retention plans; because both books and journals may be included in either of these two options, both are discussed together.

The author acknowledges that generalizations can be misleading or dangerous. Academic libraries come in many types and sizes; a situation or best practice at a small private liberal arts college library may not even apply in a medical library at a research university. But there are also many similarities, and the challenge of not having enough space to house the physical collection, either because the library's size is decreasing, the collection is increasing, or both, is a problem for many academic libraries today. Readers can easily adapt many of the suggested actions to meet their own local needs.

The author hastens to clarify that a book focusing on decreasing the size of physical collections in academic libraries should not be misconstrued as a campaign against print. Print just happens to be the format in which libraries, both collectively and individually, hold an enormous amount of obsolete, highly duplicated, and low-use material. She advocates taking logical, strategic, and efficient steps to "de-select from collections . . . with the same dedication with which we selected for them" (Lugg and Fischer 2008b, 88). Rightsizing activities are not just about deselection, however; they include identifying what print material to keep: titles enjoying good use, titles of local interest, recently acquired items, and scarce titles that should be retained for the good of the scholarly community at large (even if they no longer interest anyone at the holding institution).

When faced with planning and implementing such a large project, sometimes under less than ideal circumstances, it is easy to focus on the mechanics of moving vast quantities of material out the door while perhaps losing sight of the reason for doing so. The author tried to keep at the forefront of the discussion the ultimate reason for rightsizing—shaping and presenting collections in the best possible way to improve the user experience. She agrees with the librarian who wrote that the "challenge for academic librarians is how to reduce the size of onsite collections without either destroying the soul of their libraries or sending their faculty to the barricades" (Barclay 2010, 54).

Rightsizing does not automatically imply crisis management, although libraries that have not undertaken substantial weeding projects within recent

memory may well find themselves in crisis situations. It is also not a one-time fix. Rightsizing is an ongoing process that maintains a collection's optimal physical size by balancing such factors as:

- building current collections with a high potential for use in the short and medium term
- choosing electronic resources over print ones for many new acquisitions
- identifying local collections of distinction
- removing low-use titles that are widely held elsewhere
- participating in collaborative projects to reduce the number of consortial or regional lesser-used titles while retaining enough working copies to meet occasional demand
- withdrawing print and microform titles that now duplicate user-preferred, stable electronic access to the same material

Some redundancy has been built into this book, based on the expectation that some readers may focus only on sections relevant to their immediate needs. For example, in several places the book mentions the importance of determining if the library has *perpetual* access (not just access) to electronic content before identifying print titles as withdrawal candidates. However, this redundancy is not extensive and should not distract readers who work their way through the book from the beginning.

With few exceptions, the author decided not to name specific services or products. One reason is to avoid the appearance of endorsing one service or product over another; another is that these entities frequently change in scope, price, purpose, name, and corporate affiliation.

The interrelated topics of weeding, print retention, use studies, storage facilities, and collaborative collection management ventures all have long histories and extensive literatures. The author reviewed many articles on all these topics, but was selective in choosing which ones to cite. Many works detailed outdated processes or provided overviews of projects that ended decades ago or covered similar ground (e.g., many articles on "how we selected material to send to storage"). The author also skipped many articles focusing on narrow or specialized topics, such as weeding reference collections. This book does not take an exhaustive look into the past, but quotes from selected articles to give readers a glimpse of how academic librarians approached the continuous challenge of crowded shelves over the past hundred years. Understanding the roots and context of this challenge helps us appreciate how the problem of large no- and low-use academic collections developed over time, and how we can apply modern solutions to shape collections that our users need today and tomorrow.

"We need to learn that some books are dead books," wrote one scholar in 1949 (Colwell 1949, 195). This book will help today's librarians acknowledge this fact and determine the best way of identifying and handling the dead books in their own collections, while simultaneously retaining the ones with life in them yet—all with the purpose of improving their users' interactions with both the library in general and the collection in particular, both now and in the future.

1
Background

CHALLENGES FACING COLLEGES AND UNIVERSITIES

Before discussing the current state of academic libraries and their collections, it is useful to understand the larger environment of the current and changing states of their parent institutions.

Academe is undergoing transformational change. The number of simultaneously occurring influences, expectations, requirements, and opportunities is staggering. Some factors are new; others have increased in importance. They include, in no particular order:

- accountability to students, parents, donors, funding agencies, and taxpayers
- collaborations with international counterparts
- collaborations with business
- distance learning
- instructional redesign
- attracting and retaining high-caliber students
- employers' expectations that graduates demonstrate certain skills

- students' need to balance study, work, and leisure
- tuition costs and financial aid
- practical work experience or internships
- commitment to student success, including reasonable time to graduation
- special assistance for student groups (e.g., first-generation college attendees)
- international students
- increased emphasis on interdisciplinary scholarship
- faculty research and scholarship
- data management
- alumni relations
- campus computing
- state-of-the-art classrooms and laboratories
- compliance with state and federal laws
- diversity and multiculturalism
- international campuses
- attracting and retaining high-performing faculty
- post-graduation support
- placement services

Although many changes occur as reactions to external forces, forward-thinking administrators also embrace change to take proactive control over their institutions' futures. Many colleges and universities must compete aggressively to attract and retain the best students, and must demonstrate their ongoing commitment to quality education with more than a glossy brochure or flashy website. Prospective students and their parents now shop for what they perceive to be the best value, and assess everything from the professor-student ratio to the recreational center's facilities.

Partly as a result of all these changes, academic institutions value assessment more than ever. Assessment has always been a part of academic life, from various kinds of rankings to periodic visits from accreditation organizations, but today colleges and universities have become more proactive about assessment. Assessment offices have sprung up everywhere, and existing ones now enjoy greater visibility and significance. Their staff are devoted to measuring outcomes, developing workshops, assessing resources, conducting surveys, reporting program strengths and weaknesses and, most of all, suggesting and overseeing the implementation of changes to strengthen the institution.

ACADEMIC LIBRARIES TODAY

How do the changing environment and priorities of their parent institutions affect academic libraries? An important element is the expectation that all

academic units have their own strategic plans that align with those of the central administration, and that those plans include assessment criteria. Libraries need to prove not only that their services benefit the institution's students and faculty, but also that these services are an integral part of student and faculty success. For decades, librarians' experiences with assessment merely involved reporting statistics, such as the number of classroom visits, the number of circulated items, the number of reference questions, and, of course, the number of volumes. Today universities require departments and programs to produce qualitative measures of effectiveness, not just quantitative ones.

Academic librarians have long grappled with the concepts of collection size, quality versus quantity, and maintaining a core collection. For many librarians, the number of volumes somehow conveyed the concept of value or prestige; having more volumes than the college library in the next city meant one's own institution was somehow superior. Not everyone subscribed to this concept, however. At a 1949 symposium called The Optimum Size of Libraries, Gosnell pointed out that "size is better defined in terms of the objectives of the library and the demands on it," and boiled the issue down to one sentence: "You keep the ones [books] they use, buy more, and throw out what is not used" (Gosnell 1950, 137). Trueswell explored this theme further when he wrote in 1976 that "in the no-growth collection new books must still be added, but little-used books will be removed at a comparable rate" (Trueswell 1976, 102). Engeldinger suggested that "if college librarians were to see decay in the stacks as a useful ally and use it as a preliminary guide to weeding collections, overall quality would be improved quickly" (Engeldinger 1999, 50).

Colwell described as an element of "institutional competition, institutional pride, and institutional jealousy" the desire to make one's own college better than others in the state or region (Colwell 1949, 197). The size of library collections has been a time-honored measurement of an institution's worth and value, encouraged by all kinds of comparative rankings and endorsed by library professional organizations. Size, of course, may have very little to do with value or quality (Engeldinger 1999, 50). Some would even argue that size actually diminishes a collection's value; Gosnell wrote about obsolete books obscuring the good books (Gosnell 1950, 138). Stueart warned against "a library's drive for quantity at the expense of quality" (Stueart 1985, 49). Itner stated that

> if collection development librarians were evaluated on the basis of how well the collections they built are used, they might take a livelier interest in weeding unused items. . . . Perhaps our professional problem is that we measure collection development success by how large the collections grow, rather than by how much service they provide in proportion to their size. (Itner 2006, 16)

"It is the use of the books not their numbers that gives evidence of meeting the needs of our stakeholders," Marcum pointed out in an article that

equated unused books to a business's "idle inventory" (Marcum 2008, 15). A 1989 editorial titled "Ridding Collections of Deadwood" closed with this sentence: "Maybe we should begin to rank libraries according to the number of volumes *withdrawn* along with the number of volumes *added*" (Ridding Collections 1989, 3).

With more limited space options, college librarians are already accustomed to the idea of maintaining a collection at a certain fixed size. Librarians in larger libraries, particularly at research institutions, often have a tough time embracing this philosophy. They have worked, sometimes for decades, in an environment that cherished the notion of building collections not only for current use but also for future scholarship. They embraced, or at least concurred with, "the notion that an academic library must be large in order to be good" (Trueswell 1976, 73). The literature reflects a few other opinions, however. In 1947, for instance, Hardin pointed out that "either we must continually diminish the rate of increase or we must introduce what one might call a mortality factor" (Hardin 1947, 121). Several other authors wrote about the rate of obsolescence in library material in various disciplines. In 1976, Gore wrote, "The Alexandrian model persists through the unexamined faith that to be good a library *must* be vast and always growing. . . . [This faith] rests on nothing more solid than mistaken intuition, and [we should] consign it to the limbo of outworn dogmas" (Gore 1976, 3).

However, increased collection size does not necessarily translate into increased percentages of collection use. Academic libraries of all sizes contain large percentages of unused material. The very largest research institutions acquire titles to build as complete a collection as possible in many subject areas, knowing that some might not be used frequently. In general, however, librarians build collections to meet their users' anticipated needs. McCarthy described "demand . . . as a two-pronged thing, i.e. perceived long term demand and actual immediate needs" (McCarthy 2007, 350). Material acquired on a just-in-case basis to meet long-term demand may never be used, may be used a few times when relatively new, may be heavily used early in its shelf life, or may enjoy steady use over time. The problem is that it is nearly impossible to predict in advance into which of these categories a particular title will fall. In addition, some items that fill current needs, such as test preparation manuals and annual directories, may by definition have very short active shelf lives. Over time, the accumulation of thousands of items each year results in book stacks filled with low- and no-use titles interspersed with those relatively few titles that patrons actually use.

How do collections fulfill the library's mission? In the past, a library's mission included collecting material that supported the parent institution's curricular and research needs, and offering services, such as reference and instruction, that promoted the use of that collection to fill users' information needs. If rewritten today, in all but the largest research libraries, the mission statement might be changed to *providing access to* material that supports the

parent institution's curricular and research needs. Today the total collection need not reside on campus; for most libraries the collections to which their users have access exist in many places besides on the local shelves. A growing part of it now exists digitally (and in the case of e-book patron-driven acquisitions plans, remains unpurchased until the moment of use), in off-site storage facilities, in consortial or regional cooperative storage facilities, or geographically close enough to allow resource sharing within a reasonable amount of time. This increased range of access means that the library can withdraw older or less-used material to which it can provide fast access on those relatively few occasions when it is needed, thus focusing its resources on building and maintaining a smaller local core of more frequently consulted material. Librarians may well decide to keep and maintain a small portion of the legacy print collection, but they can select items supporting a few specialized collections of distinction that define their own institutions, rather than struggle to maintain a comprehensive historical record in many subjects, especially when the material that comprises that historical record largely duplicates titles held in similar institutions across a state, region, or country. This means that librarians can develop plans to reduce their physical collections.

A ROSE BY ANY OTHER NAME

Librarians tap-dance around the words to use for the process of identifying and removing material that is no longer needed. The most common word is *weed*. Sometimes weeding is used to mean identifying material to send to a storage facility; at other times it means removing material permanently. The word has a negative connotation from its use in gardening and agriculture, where it indicates an unwanted, or even downright harmful, plant. The gardening analogy is useful because we understand that it is hard to see or appreciate the useful items (lovely blooms) if the shelves (flower beds) are choked with undesirable ones (weeds). Of course, some weeds are charming to look at, even though they choke out desirable or useful plants. But the negative connotation persists; Segal wrote that "weeding implies ridding an area of the undesirable, even infectious" (Segal 1986, 25). *Pruning* suggests a similar concept: thinning part of a plant and removing the deadwood so that the bush or tree may thrive.

Librarians have tried many other terms to avoid the the word *weed* and its negative connotation. A century ago, an anonymous no-nonsense librarian entitled his or her article "Discarding Useless Material" (1911). Some librarians have tried *retirement* (Ash 1963; Stueart 1985). A British author wrote about *obsolete stock* (Seymour 1972a).

An Australian used the term *stock stabilization* (Taylor 1976, 28). *Withdraw* is a popular choice. *Stack thinning* has been used (Trueswell, 1965). Williams called it *stock relegation* (Williams 1988). *Shelf-load reduction* has been

used (Metz and Gray, 2005). Tongue in cheek, Manley suggested *library collection refreshment program* (Manley 2014, 80).

Deselection sounds very professional because it implies the thoughtful application of criteria to choose which items will leave the collection (Cooper and Norris, 2007; Thomas and Shouse, 2012; Ward and Aagard, 2008). A current favorite term is *print retention,* which shifts the emphasis away from the material leaving the shelves and focuses on the items chosen to remain. *Print archiving* is a relatively new term to describe a group of libraries' efforts to identify a certain low number of copies of works that will be retained in light storage (circulating) or dark storage (noncirculating preservation copies) on behalf of a group so that other members can then discard their own low-use copies if desired; this process often refers to runs of journal titles for which publishers have issued electronic backfiles (Bird and Ashoughian, 2012).

These terms provide librarians with polite words for a process that makes us wince: to be blunt, we are throwing away or otherwise disposing of unwanted material, but we want to convey that we give this activity the same careful attention that we do other aspects of our professional activities.

Although the term *weeding* no longer adequately describes the activity of making retention decisions about the physical collection, let's review some of the past discussion on this topic.

In 1976, Trueswell described weeding as a process whereby librarians make retention decisions by examining books and considering other factors such as circulation, age, subject area, and so on. He suggested that the results would be of "questionable value," but that "weeding decisions made by faculty experts are usually even less reliable. . . . Subject expertise counts for very little when the central problem is to predict mass behavior of a very large population of library users" (Trueswell 1976, 79–80).

In 1979, Bulick and his colleagues identified two main types of weeding: scientific and nonscientific. The nonscientific method requires experts to decide which items may have sufficient future value to justify keeping them; these decisions are subjective. The scientific approach involves developing models based on "tangible evidence" such as publication dates or circulation history, and then automating the retention decisions based on the model; these decisions are objective (Bulick, Sabor, and Flynn 1999, 48). Stueart emphasized the importance of "decisions [that] are based on facts and not simply on fancies or hunches" (Stueart 1985, 48). Similarly, Manley advised librarians not to employ "a random approach [and to] be systematic to avoid being accused of being arbitrary" (Manley 2014, 80).

Stueart considered the process to be linear:

> On the one hand, one must evaluate materials before purchasing them, and, on the other hand, one must re-evaluate their usefulness to the collection and then remove them, if they have lost their value. This removal

> requires judgment just as selection does, and involves added pressures
> that the initial purchase did not. (Stueart 1985, 49)

Unlike many of his contemporaries, Gosnell suggested that "weeding must be posited on accessibility to a central source that does keep the material that everybody else weeds" (Gosnell 1950, 138). In 1950, it was difficult to determine that another library would maintain the specific titles that one's own library weeded. It is much easier today.

Today most librarians would also agree that the objective method offers the best approach to rightsizing collections that may not have been seriously evaluated for decades and which contain a million or more pieces. It simply is not feasible to make item-by-item decisions, especially because while doing so, one must also spend time reviewing thousands of items that obviously should be retained. Now it is possible to build sophisticated withdrawal candidate models that not only weigh many more variables (Bulick's "tangible evidence") than was possible even a few years ago, but also automatically exclude titles that the library should keep (Bulick, Sabor, and Flynn 1979, 48).

Despite having more sophisticated tools for analysis today, the criteria to consider are still the same as they have been in the past. Two criteria that are almost always considered for books are the circulation history and the publication date. Since most academic libraries have used automated circulation systems for at least several decades, compiling circulation data is usually possible. It is important to know how many years of data are available (it will usually date from the installation of the system). Are there any reasons to doubt the accuracy of the data and, if so, what adjustments should be made to compensate? Does the system capture browsing or in-house activity for the same time period and, if so, will the data compilation incorporate it? Some older studies examined the amount of time between circulations to make use calculations; although this activity was possible when researchers could examine date-due stamps on books' circulation slips, this factor is now impossible to calculate from automated circulation systems designed to purge details once users return books. Librarians can now query their circulation systems to learn the total number of circulations and browses within a particular date range for a particular book, and also the date of last circulation, but interim details are not available.

WHY RIGHTSIZE?

So why use the term *rightsizing* instead of one of the other words or phrases used in the past? It is not just a new-fangled term to replace *weeding*. Rightsizing implies that librarians have developed the correct approach for shaping their libraries into the optimal size to serve their current constituents,

not only with the right mix of material, in terms of both content and format, but also with the right set of services to obtain needed information quickly and efficiently if it is not available on-site. Rightsizing is not the ruthless culling of a library collection, nor is it just the tentative and apologetic removal of "safe" material like old editions of textbooks and superseded reference works. Rightsizing is the strategic, thoughtful, balanced, and planned process whereby librarians shape the collection by taking into account factors such as disciplinary differences; the impact of electronic resources on study, teaching, and research; the local institution's program strengths; previous use based on circulation statistics; and the availability of backup regional print copies for resource sharing.

Why do libraries contemplate rightsizing their collections? The reasons are many, complex, and often interrelated.

Space is an obvious reason; any growing physical collection cannot continue to occupy the same finite space indefinitely. Coupled with this is the need to use library space differently or pressure to meet other campus priorities by finding space for new or expanding programs and services. Even the most ardent opponent of weeding will agree that some material has long outlived any usefulness it might once have had. Resistance arises from unwillingness, for reasons which will be explored later, to part with any of it. As long ago as 1976 we find articles with statements about how the "position of the university library as a book depository is more and more being challenged as the emphasis is moving toward the library as an active service facility" (Taylor 1976, 28). Libraries should be vibrant information centers, not just warehouses for every item that ever entered the collection.

Large libraries that in the past seldom discarded anything have found that over time their collections have grown enormously, and that the cost of maintaining low-use material has risen out of proportion to the utility of having it available on-site or nearby, especially when much of this material is now available in digital equivalents. Maintaining no- and low-use material also represents real opportunity costs: in what other ways might the library have spent those maintenance funds for better-used and more-appreciated programs, services, and material?

Obsolescence is another major reason. The information in some books eventually goes out of date, although at different rates for different disciplines. Farber worried that for "many students, the mere fact that their library has a particular title in its collection means that the book is a valid work of scholarship" if they have not yet learned to evaluate the sources that they use (Farber 1998, 1).

Some parts of a library collection are now in less desirable formats, such as microform, and other pieces are outdated, physically deteriorated, duplicated in newer and preferred formats, or unused because of program changes

or other reasons due to lack of local academic interest. Users increasingly prefer (or will at least use) electronic resources, which provide 24/7 access when visiting the library ranges from inconvenient to impossible, as is the case of growing numbers of distance learners.

A further concern is that as collections grow and age, users will find it increasingly difficult to identify and locate relevant material on crowded shelves. "Removing low use materials should increase the user success rate, decrease user frustration in search time and effort, and facilitate stacks maintenance" (Stueart 1985, 53). One drawback of a physical collection is that an item physically present on the shelves is more likely to be "rarely borrowed rather than one which is regularly borrowed, and there is danger that the reader, and perhaps especially the undergraduate, will come to regard the collection as comprising largely dead material which will induce in him a lack of confidence in the library stock, eventually hindering his discovery of live material" (Taylor 1976, 28).

Some studies have shown that books located on the uppermost and lowermost shelves are used less frequently than books shelved at more easily accessible levels. Circulation staff must spend more time shifting books to try to make more room. Crowded stacks may be prone to shelving errors, thus requiring more staff hours for shelf reading.

At the heart of any rightsizing project stands the core value that it is being undertaken to improve the user experience. Trueswell expressed this concept in 1965 when he wrote that "the criteria for stack thinning should be designed to help the library satisfy the requirements of the users of the library" (Trueswell 1965, 22). Librarians sometimes overemphasize other positive results of rightsizing, which might include recovering shelf space, removing material in less popular formats like microform, or avoiding the cost of building or expanding a storage facility. Although these are important outcomes, the project should ideally be undertaken in the same user-centric spirit as collection development: as a complement to the activity of building the collection to meet user needs, rightsizing shapes the collection to help users find relevant material quickly and easily. Manley wrote that the "library that operates without an ongoing and systematic weeding strategy is not giving its users the professional attention they should expect" (Manley 2003, 80).

Thomas and Shouse identified two traditional reasons and two newer ones for weeding. Traditionally, libraries weeded to create space for new material and to create "a more usable, up-to-date, and attractive collection." They added two new reasons: "the changing perception of libraries from book warehouses to service points, and the . . . radical shift from print use to electronic use of scholarly content" (Thomas and Shouse 2012, 92).

Is rightsizing perfect? No; it is inevitable that there will be a few mistakes in a large retroactive rightsizing project that involves tens or hundreds

of thousands of volumes, or even in the ongoing routine collection mainte-nance that rightsizing also requires. None of these errors are irreparable if librarians focus on withdrawing low-use books that are widely held in print elsewhere or on journals that either have electronic equivalents or are readily available through interlibrary loan (ILL). Developing and building consensus for thoughtful and strategic withdrawal criteria reduce the likelihood of many errors. It is important to focus on the overall benefits of reducing the physical collection, rather than agonizing about the few items that may need to be borrowed or replaced later. "It is probable that the greatest mistake is made by the librarian who refuses to weed or by the user who considers it unnecessary" (Martin and Manch 1971, 599).

THE DIGITAL REVOLUTION

The widespread availability of digital format for both new and retroactive con-tent has revolutionized the scholarly world and the libraries that support it. Libraries face many new challenges with this new format, including how to acquire it; how to describe it; how to catalog it; how to provide access to it; how to promote it to their users; how to teach best practices for using it; how to produce it; how to convert print format into digital; and how to store and maintain it. After centuries of handling tangible items, librarians now must handle the intangible. It has not been an entirely smooth transition, and it is not yet over. For some decades to come we will continue managing collections in both formats. Despite several massive efforts, it is not "all on the Web" yet. Although patrons have generally embraced the electronic journal article, some still resist the electronic book in certain disciplines or for particular uses. There are also significant legal and economic barriers that prevent the univer-sal availability of all previously printed works in digital form.

Two of the major types of digital works that libraries acquire for their users are journals and books (which also include reports, government doc-uments, theses, dissertations, and similar items). New works may still be issued in both print and digital formats, although not necessarily simulta-neously. Sometimes the works may be digitized versions of those that origi-nally appeared in print some time ago, such as journal backfiles or decades-old books that were created as part of digitization projects. In yet other cases, the digital versions may include features that were not included in the print equivalent, such as links to external sites or to data files. (Other formats, such as music and film, may be digitized, but these are beyond the scope for this book.)

Even without the digital revolution, many libraries would face severe space crises. In some respects, however, the advent and widespread acceptance

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