In this paper, we will focus on the protocol for coordinated weeding and on the project of the central cooperative reserve stock, developed by the Fondazione Per Leggere – Biblioteche Sud Ovest Milano, a library network formed by 54 municipalities, situated in the South-West of Milan. The weeding protocol currently used is the result of a process of discussion and formulation of the criteria for weeding, which involved a scientific committee of librarians. From this process, the fundamental requirements for the construction of a coordinated weeding have been identified, first of all the professional updating of the staff operating in the network on issues such as the general principles of weeding and collection management, the definition of common procedures and the availability of a software network that can support a collective review online. The common chart of weeding is presented as a general tool for the weeding criteria and provides specific indications for each discipline in the holdings, prepared as a result of the personal experience of weeding of the collections by the individual librarians in the field. The process of coordinated weeding is strictly linked to the presence of a central reserve stock. The Foundation has made an important investment project-wise and financially in order to guarantee to the system a central reserve stock site, inaugurated in 2010, which plays a determining role under both the profile of availability of contents and that of logistics and organization.

Keywords: Library cooperation; shared repository; collection maintenance; collection assessment; weeding policy; professional training; weeding evaluation methods

Das Projekt der kooperativen Aussonderung der Fondazione Per Leggere


Schlüsselwörter: Bibliothekskooperation; gemeinsame Re-positorien; Pflege von Sammlungen; Bewertung von Sammlungen; Aussonderungsplötzlich; Berufsausbildung; Bewertungsmethoden der Aussonderung

1 Introduction

Born in 2006, Fondazione Per Leggere – Biblioteche Sud Ovest Milano1 – is a library network formed by 54 municipalities, which coordinates the activity of 58 public libraries within an area equal to one quarter of the province of Milan and formed by various realities with different social contexts.

1 For further information on the institutional aspects and the activities of the Foundation, visit the website http://www.fondazioneperleggere.it.
and demographic features: the majority of the villages does not have more than 10,000 inhabitants, with around 20 little agricultural communities that are below 5,000 people and some urban centres which are a little bit bigger, some of them strongly interacting with the metropolitan area of Milan.

The foundation is born with the aim of improving the quality of the services of public reading through the promotion of reading in all its ways and the development of the existing documentary assets.

In the first phase of the library network, the reflection about the collection management has immediately emerged as strategic for the quality of services. After the institution of the single OPAC and of the inter-library loan, as the basic services needed for the construction of the network and as a prerequisite of a policy of collections and of a practice of weeding, the need for an evaluation of the quality of collections has emerged with urgency.

In fact, there were more than 880 thousand items but the selection of available titles was little more than half of it, meaning that the duplication of items among libraries was very strong.

Due to the limited spatial availability for the library locations, many of them had big problems of space for the widening and enrichment of the collections and, according to the statistics of loans, it seemed that the use of documents was limited to the 20 percent of the available titles, whereas most books were left on the shelves or subject of a very small number of loans.

These considerations have shown the necessity for some measures of improvement: on one hand, a coordinated collection development policy, associated to the institution of a central library for storages, on the other hand, the institution of a centralized purchasing service supported by a cooperative paper of the collections towards the realization of a coordinated and qualified increase of the documents provided.

In this paper, we will focus on the protocol of coordinated weeding developed since 2009 and on the project of the central library for storage, inaugurated in 2010 and aimed at the weeding and requalification of the collections.

2 The Project of Coordinated Collections Weeding

The elaboration of the weeding protocol currently used is the result of a long process of formation, discussion and formulation of the criteria of weeding, which involved a scientific committee formed by 8 librarians and 2 library consultants, who proposed and formulated the documents, and all the librarians of the network which have taken place in the formation and have verified on the field the procedures and the choice of the weeding criteria.

From this path, it has emerged that the fundamental steps for the construction of a coordinated weeding are:

- the knowledge and full awareness of the general principles of weeding on behalf of all the librarians;
- the education and professional updating of the staff operating in the network on issues such as the collection management, weeding and the identification of responsible centres that oversee the realisation of the coordinated weeding;
- the elaboration of a common grid of assessment that can be initially only one for the whole area of cooperation, with some distinct options for different kinds of libraries (small, medium or big). This grid is presented as a general tool for the weeding criteria and provides the following documents with specific indications for each disciplinary section of the assets, produced according to the direct experience of weeding of the collections held by the single librarians in the field;
- the planning of a storage library for the network that can be substituted, especially at the beginning, by various decentralised spots of depository. Clearly, the above-mentioned grid must contain also the storage criteria;
- the definition of operational modes and common procedures;
- the availability of a software network that can support a collective review on-line through dedicated functions where the librarians express their local choices, previously defined by common operational rules and procedures, in a database viewable by everyone;
- the existence of a service center that handles the central library of storage and manages direction. The level of centralization of weeding can be differentiated from simple technical coordination (providing information on how to prepare the administrative records, fill out and print the lists to be attached and which forms to use) to some direct actions such as deleting references of the items removed from the catalogue, the compilation of lists to be attached to administrative measures, statistical data processing and the management of new locations. In any case, it is up to the center, according to the individual libraries, to define and seek the overall periodicity and timing of interventions (who does what and when).

3 The Training

The starting point required to mix, through training sessions and debates, the professional skills about weeding of the scientific committee of librarians in order to build common points of reference before starting the draft of the weeding protocol. This route started from the definition of weeding as an ongoing process of maintenance and re-organization of the assets, with the aim of enabling the library to offer to its users valid, updated and useful documents.

The criteria for evaluation are clearly set out by international organizations (ranging from the UNESCO document entitled “La biblioteca pubblica nel mondo” of 19732, to the last edition of the guidelines IFLA/UNESCO, 20023). From this information, weeding emerges not as an isolated and random

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moment but as a normal way of maintaining the collections, an important part in the collection management that must be contained in the Collection development policy⁴, together with the awareness of the community profile, the criteria and modes of increase and assessment of their efficiency.

The heart of weeding consists in the analysis of the document through specific criteria, ideally organized in an evaluation grid, in order to decide what needs to be kept, put into storage, deleted, donated or sold.

Hence, the first step was to develop a grid of evaluation that, following the general principles of weeding, could adapt to the specific situation of our library network and, therefore, could spring from an analysis of the present situation from the point of view of the collections, but also from the one of the staff and the library capacities.

In order to do so, a questionnaire has been elaborated and delivered to all the libraries aiming to understand if and how a practice of weeding was already present and how it was done: periodicity, criteria, tools, staff, administrative aspects and limits. From the questionnaire, it has emerged that more than 50 percent of the libraries did not have any weeding practice. The most relevant reasons for it were, in order of priority: 1) the lack of adequate organizational conditions, 2) insufficiency of personnel, 3) the impossibility to adequately increment the collections due to economic problems, which made the librarians reluctant about eliminating the current documentary assets for fear of leaving the shelves empty, 4) the absence of an adequate training. The questionnaire showed a very much unequal situation in regard to weeding: on one side, there were libraries that have been weeding for much time, whereas on the other, there were libraries that had never done it, with no competence or experience on which they could count, and a third group in the middle that was weeding only occasionally.

The result highlighted the need for the activation of a plan towards the global education of librarians, with precise modalities. The first introductory day was very much theoretical about the whole library system and dealt with the following issues:

- The weeding basics in the professional literature: the recommendations for the public libraries of the IFLA. The evolution of this concept abroad and in Italy
- The State ownership of the collections and the administrative and juridical issues
- The analysis of the document: proposals about evaluation methods
- The application of weeding to the multimedia documents
- The re-modernization of the historical collections
- The results of weeding and the process of the document: shelf, storage room, gift, exchange and sale
- The coordinated weeding
- The the central library for storages: organizational model and functions

In the following days, the libraries have been divided into three groups according to their geographical proximity, in order to create smaller groups of work that could, in a later stage, constitute a network of collaboration and exchange for a better and more systematic weeding. These groups have worked in an experimental way to verify the criteria in the field, through a concrete practice of weeding of some random sections of collections, proposed by the librarians.

With the plan of theoretical and practical training of all the librarians in the area of cooperation, the first goal to be achieved was the improvement and uniformity of the librarian competencies about the issue of weeding for all the personnel, thanks to a moment of closer analysis and comparisons in reference to both the theoretical and practical aspects.

This experiment, which was done with meetings “in the field”, in the libraries, created a model of operational practice and activation of weeding. Lastly, the process, especially through practice, promoted teamwork and consolidated the necessity for common rules for cooperation.

Overall, the formative meetings saw a great participation on behalf of the librarians, with more than 100 people in the plenary session of theoretical formation and an average of 30 people for the practical exercises.

The moments of practical experimentation have allowed, through comparison and reflection, to improve, modify and integrate the evaluation framework that had been proposed: they have proved to be real and actual laboratories.

4 The Weeding Criteria: the Evaluation Grid

In the first draft of the framework (see attachment) the reference criteria for the analysis of the document were the ones of the IFLA: basically, the physical aspect, the content and the use.

These basic scientific criteria, from which to start to elaborate any evaluation framework, can be used in a variety of ways: if we consider, for example, the category of physical aspect, we can talk about deteriorated, broken, underlined, dirty, incomplete material, with obsolete and out of date fashion style. The deleted publications are proposed for re-purchase only if they have been used in the past three years or belong to the category of classics.

In regards to the content, the elements identified and selected for the deletion of the documents are the kinds of very much outdated/obsolete typography (this principle is stronger within the teenage sector), the presence of mistakes and wrong information, the obsolete or outdated content and the non-pertinence referred to the bibliographic profile of the collection.

It is important to underline that the criteria identified in the protocol of weeding of the Foundation are related to the public libraries of general character and, in the specific, to the current situation of the libraries of the Foundation. With the change of general conditions and the experience of good practices of weeding, the framework must change and adapt to the new conditions because it has been conceived as a flexible tool that acquires depth and validity through the continuous monitoring of correspondence with respect to the needs for development of the collections, the transformati-

The project of coordinated weeding for the Fondazione Per Leggere

ons of the public requests, to the operational and procedural potentiality of the organization of the library network. The general principles of the grid remain the unchanged scheme that can be turned down and adjusted from time to time according to the contingent necessities.

For example, in this first draft it hasn’t been possible to insert in an integral way the criterion of the use of the work, which is fundamental for the evaluation, because the historical series of loans present in the database was limited to only 3 years (you would need at least 5), while it will be possible soon to introduce systematically this criterion of use, so important towards evaluation.

In the following points, as examples, we present some debated points of major interest about the evaluation framework:

The non-use: in the initial part of the project, due to the limited possibility of detection of loan, which is limited to the last three years, it has been decided that the criterion of elimination linked to the non-use of the work was too drastic. Then, was simply decided to eliminate from the assets the double and triple copies not lent in the previous couple of years.

The single titles: starting from the awareness that the storage library needs to be used to lend and not to conserve, it has been decided not to keep in storage all the titles of the network that could be sent to deletion, but only those of narrative, whose validity does not present objective and scientific evaluation elements. For the single titles of essay literature, instead, the content will be carefully analysed, even if still considering that some positive elements, such as the editorial relevance, the precious graphics, the critical apparatus or very prestigious translations could prove to be relevant to the scope of deciding to keep them.

The classics: the definition of “classics” plays a very important role in the process of weeding because the classics, according to international recommendations, should always be present in an significant library collection, to the extent that, if the copied held are too badly preserved, they should be replaced with new copies, possibly in a better edition. For this reason, it has been frequently strengthened and accepted that the concept of classic work had to be extended to all the subjects and not only limited to literature, thinking of “classics” as the publications that have contributed significantly to the development of a single subject and that have been recognized by famous authorities.

The definitive framework has been inserted in the “operational procedures” for coordinated weeding of the collection of the Foundation in the month of July 2010, and its operational application is still ongoing: it will take still some time to evaluate the results because the practice of weeding is extremely complex both from an evaluation point of view of the working organization and in the long periods of application that it requires.

Looking at its application, there are some rules to respect in order to ensure effectiveness. First of all, it is essential to follow the framework step by step, without skipping any passages: the path of evaluation is gradual and progressive and the personal valuation made in advance by the librarian should not overlap or precede the evaluation process, be void of objectivity of the framework. It is very tempting for the librarian, in fact, to elude the process by using his own personal experience and cultural competences in order to decide whether to leave a document on the shelf or get rid of it. The subjective aspect of the evaluation is not only inevitable but also fundamental: however, it has to be framed within a conceptual method that must be as objective and consistent as possible for each document and, above all, that enables a consistent approach at the cooperative level.

There are various critical points to be outlined in the process of coordinated weeding. Among the first ones, there is the “time” factor because an evaluative approach to be carried out on every single document requires a lot of time and much tranquillity, two conditions that are often unreachable for librarians, because of the lack of personnel and constant influx of people. From this point of view, it becomes essential to plan the moments of weeding within the activity of work, such as trying to rationalize and simplify the weeding procedures, by using at best the tools made available by the digital catalogue and the software of management. The approach to weeding must be gradual: it is useful to select some section or sub-sections amongst the assets that we think are more in need of weeding and go from there systematically, isolating from the group the selected items and proceeding until the completion of the section. This enables to have a vision of the totality of the chosen section which helps a correct weeding.

A strategic point of strength (but at the same time a difficult goal to achieve) is the coordination of operations and the realization of a systemic approach. The libraries can split into groups of 3 or 4 and proceed in a coordinated way within various sections of the assets, in order to help each other out through mutual comparisons and with the aim of elaborating specific indications for each considered section, which works as a reference for the whole system. If each group deals with different sections, it is possible to cover all the assets documented in the system. The division should take place between families of libraries because libraries of different sizes have surely different weeding levels starting from the biggest ones that, having richer sections, can offer more details on the various areas of the collection. This coordinated process should lead to identify some referees for the weeding of different subject areas of the documents held in the system. It is fundamental also a central coordination of the activities, which would be the referent object both on the theoretical level and on the practical one and which would gather and coordinate the experiences of the various library groups, in order to formulate a programme and a common protocol of weeding.

It has been written a document about the procedures with all the “tools” needed and sufficient in order to start to do a coordinated weeding, included the models of administrative acts, the IT apparatus, the times of start, the thematic, the practical modalities and naturally the evaluation framework.

In order to test the procedures and the whole mechanism of coordinated weeding it has been suggested to start in all
libraries with some sectors with a high level of obsolescence and mistakes in the information because they are easier to evaluate, such as the sector of public competitions and that of tourist guides.

From the beginning, we have worked in collaboration with the office of cataloguing, both in terms of how to manage and send the materials to the storage place, and in regards to all the information and notes to be included in the database that could be helpful to the coordinated weeding.

In the operational procedures are indicated a series of tools and reports that have been made available from the software to be used as help and support to weeding. Here there are some examples: the number of copies of the same work in the catalogue, the loans per copy, the date of the last loan, the total number of loans in relation to the title, the precise specification of the physical status of the work in the storage in order to understand whether it can be replaced with a better copy, still present in the libraries.

5 The Central Library of Storage

The process of coordinated weeding is strictly linked on the functional and librarian level to the presence of a library of storage. The Foundation has made an important investment project-wise and economically in order to guarantee to the system a central storage, functionally and spatially located near the offices for cataloguing and centralized purchases. Below, we will mention some of the most important aspects of library project management of the storage areas in relation to the project of coordinated weeding.

Following the guidelines of ILFA/UNESCO, the centralized storage is an “active” collection constituted by documents presented as “less recent and rarely consulted, but still usable and used and not substitutable with others nor available in other forms. The books with outdated information or ruined should be left out and not conserved in the storage. It is convenient to keep these kinds of collections in storage in collaboration with other libraries.”

Also the storage place, in order to be efficient and useful, must respect some conditions:

- be structured, with spaces, personnel and resources devoted to it
- be managed with an adequate software. The software must guarantee a double function:
  - to enable the users to see the document in storage thanks to the collective catalogue in order to be able to request and receive them shortly in their library of reference;
  - to guarantee the librarians a reserved area where they can put the main information about the weeding carried out on single documents, in order to build, throughout time, a database that can provide useful data for weeding, to be shared amongst libraries and
- that could enable a constant exchange of information between the libraries and the service centre;
- to be projected and replenished through clear and definite criteria for storage that are included in the common framework of weeding, in order to avoid extemporaneous and inconstant solutions.

The criteria for storage, although having as a common denominator, often hidden or almost implicit, the low circulation of documents can be different and must be defined and weighted referring specifically to the community, the users profile, both real and potential, of the library.

Some examples:

- double copies that you decide not to throw away
- minor works of classical authors
- obsolete publications for content but of great editorial or graphic importance
- the previous and significant editions of a book left on the shelves
- publications partially or totally outdated in content but which witness the history or the evolution of a certain subject
- the fragile documents (e.g. collections of drawings, maps etc.) that need a “monitored” use
- works that for their local historical value or specific other reasons are meant to be kept in a special area.

The central storage library, in the model of cooperation of the Foundation, plays a determining role both under the profile of availability of contents and under that of logistics and organization by providing the following services:

- purchasing, inventory, relocation and storage of documents sent by the libraries
- cleaning and maintenance of the purchased materials
- periodic review of the acquired materials and, when applicable, elimination
- maintenance and updating of the collective catalogue, also through participated procedures (which need the direct intervention of the librarians, in addition to the staff of the storage place)
- management of the requests for lending, transporting and delivering documents
- consultancy service in loco
- cooperative programmes for purchases towards the completion and updating of collections (e.g. circulation collections, best sellers, publications with specialized content or in foreign languages other than Italian)

Not having, if not in a marginal measure, direct functions of access by the public or the library operators, the central library for storage does not need particularly significant urban collocations. It has found place in an old industrial tent of 330 meter square of area, which has been restructured and made functional to the scope thanks to funding from the Region of Lombardy.

The sizing was carried out through a prediction of how many materials would be placed in it. In the absence of historical series of data on circulation, the estimate was based upon the age of the documents owned. The date of publication has been used to identify a threshold of decline...
of usage, beyond which the documents must be put in the central deposit.

In 2007, assuming to set the age limit of the decline of usage at 85 percent of the loans made, all the volumes published before 1988, which were around 225,000, should have been sent to the storage place. Considering that, on average, in the catalogue there was a title referring to three copies, the deposit has been sized in order to accommodate around 75,000 volumes in the first place, which must be added to the one of circulation and, in perspective, the one in the local history.

Another interesting debate concerned the ownership of the documents preserved in the library of storage. The adopted solution sees that the libraries deposit their documents maintaining the ownership and leaving the physical management and their circulation to the personnel of the storage library, who are responsible also for the interventions of periodic weeding of the collection in storage and the identification of the copies to eliminate, which are highlighted by the libraries that own them towards elimination from the catalogue and the collection (administrative procedure of stopping the State ownership, requested by the current legislation).

6 Dimensional and Technical Requisites

The organization of the materials in the deposit recalls the criteria of storage, which enable the maximum exploitation of the shelves available: the use of compact systems has been privileged because they usually guarantee the possibility of storing around 39 copies per linear meter. Therefore, it has been put up a structure with 2560 linear meters of shelves, split into four blocks. The needed space is about 160 m² of compact shelves.

The ordering and tidying of the materials in the shelves does not take into account the order of the CDD classes because it makes it difficult to allocate the materials given later to the storage and not very efficient in the use of spaces.

The chosen system is that of format, which ensures an optimal usage of the available spaces and makes it easier the storage of the documents received in a later moment; however, this solution makes it compulsory the catalogue relocation, replacing the primary allocation with a topographical criterion that enables the recovery of the document in the storage.

A central deposit structured by this way becomes a real library in addition and can guarantee strong economies in comparison to the management of pieces of storage amongst and within the single libraries.

7 Perspectives of Development

A cooperative store, because of the nature and type of functions performed, is very useful especially to the collaboration among various library networks. Due to the level of investment initially requested and the costs of regime it is not recommended to replicate this structure in areas below the provincial level, even in a complex and articulated situation as it is the Milan province, where the Foundation operates.

The work that we are doing follows the direction of signing agreements with other networks of cooperation that provide the sharing of their collections stored at the central library of the Foundation. An agreement in this sense is being signed by the Library Network of East Milan (SBME) and the Province of Lodi.

The aim is the integration of the single stocks of documents in a single collection managed through organized protocols and informative interoperable systems, in order to maximize the economies of scale of the project.

Framework of Evaluation

Fondazione Per Leggere – Biblioteche Sud Ovest Milano 2010, Elimination criteria (donation, destruction, sale)

- Physical State
deteriorated, falling apart
underlined, dirty
incomplete
The publications above, if they have been used* in the past 3 years, are put for re-sale

- Content
typographical type strongly outdated and/or obsolete
(for the kids sector)
mistaken information
obsolete and outdated content
not pertinent to the collection
For the publications above, the re-purchase of the subject is considered in comparison to the database of the cooperative area

- Use*
double copy not used* in the preceding two years present in the single library
* Because of the possibility of detection of loans being limited to the last three years, it has been decided not to widen, in this phase, the application of the criterion of use.

Criteria for the Central Library of Storage
1) Minor works of classic authors of any subject
2) Obsolete volume, also just partially, but of great editorial or graphic importance
3) Outdated content but that witnesses the history or the evolution of the subject
4) Fragile Document (e.g. drawings collection, geographic maps) that requires a monitored use
5) Unique titles of literary works
6) Old editions of classical authors, which are distinguished by the quality of their critical apparatus, the introduction or the translation
7) Manuals and essays that are valid for content but at low index of circulation. Short biography of the authors on themes such as cooperation and weeding

To be continued ...

Translated by Benedetta Balmaverde