MEMORANDUM

TO: Susan Beck, Collection Development Coordinator
    Steve Hussman, Department Head of Archives & Special Collections
    Paula Johnson, Engineering Librarian
    Paula Kilgore, Shelving Manager
    Liz Miller, Cataloging Librarian
    Dotty Ormes, Government Documents & Maps Librarian

FROM: Norice Lee, Head of Access Services – Workgroup Chair

DATE: September 1, 2010

SUBJECT: Collection Management Workgroup

You have been appointed by the Dean of the Library and have agreed to serve on a workgroup charged with:

*Responding to the challenge of offloading library materials, based on the 2010 Bohannan Huston - NMSU Branson Library Floor Loading Study and subsequent OFS recommendations, by investigating remote storage options, reviewing and revising collections-related policies, and developing categories and general criteria to be applied in the withdrawal or relocation of library materials to remote storage.*

The Collection Development Workgroup will:

1. Identify remote storage options and other planning considerations including--
   a. Retrieval of materials
   b. Communication strategies
2. Propose a revised Withdrawal Policy (#13)
   a. Address disposition of materials, such as de-accessioning and recycling
3. Review current Gifts Policy (#22) for compatibility with the Withdrawal Policy
4. Provide a prioritized list of items (by category) that would be candidates for withdrawal
5. Develop criteria for the relocation of materials to remote storage
6. Develop a mechanism to record and report linear feet offloaded from the floors

*The deadline for completion of the above charge is November 1, 2010.* You will soon be contacted regarding the date and time of our first meeting. A copy of the Bohannan Huston report is available on reserve at the Zuhl Service Desk for your review. Additional floor-load information will be provided at our first meeting. Thank you for agreeing to serve on this important and time-sensitive workgroup. I look forward to addressing these critical issues with all of you in the weeks and months ahead.

cc: Elizabeth Titus, Library Dean
    David Baldwin, Associate Library Dean
MEMORANDUM

TO: Elizabeth Titus, Library Dean
FROM: Nocrine Lee, Head of Access Services
DATE: November 8, 2010
SUBJECT: Collection Management Workgroup Report

Thank you for your patience with the Workgroup in submitting the report. There was considerable data and information to review in order to respond to the charge. Please do not hesitate to let us know if you have any questions, or would like any additional input. We appreciate the opportunity to provide recommendations regarding such an important issue as offloading collections.

cc: David Baldwin, Library Associate Dean
Workgroup Members-- Susan Beck, Steve Hussman, Paula Johnson, Paula Kilgore, Liz Miller, Dotty Ormes, Ingrid Schneider
Library Collection Management Workgroup Report

Introduction

The Workgroup spent significant time determining which titles within the Library’s collection are appropriate candidates for withdrawal, relocation, and/or remote storage. While there is considerable concern regarding the structural impact of our growing collections on Branson and Zuhl floor loads, the members of the Workgroup resolutely believe that any collection decisions made within this context should continue to align with the Library’s core mission, vision, and values.

The recommendations outlined below take into consideration collection usage, access, and related operations. The Workgroup emphasizes the need to:

1. Heighten communication among Library staff and campus constituents regarding the offload initiative
2. Maintain a user-focus before, during, and after offloading, including the preservation of remaining user spaces
3. Retain and preserve materials based on their research value
4. Provide Library staff with sufficient time, flexibility, and resources that will lead to sound decision-making and effective implementations

1. **Identify remote storage options and other planning considerations including—**

   Remote storage options include:
   - Leasing or purchasing an existing facility
   - Building a new facility or library addition to Branson or Zuhl
   - Partnering with other research libraries to create a shared facility
   - Ideally, the facility would be on campus, or within reasonable proximity to the University. A *remote* site would potentially increase staff time commitments and create additional access-related barriers.

   The storage facility should be equipped with flexible shelving and a configuration that allows for anticipated growth, particularly if/or when a long-term, more permanent solution is the goal. Extended, industrial-type shelving is the most desirable option, as it requires a smaller footprint; and shelving within the facility can be expanded both vertically and horizontally to accommodate future growth. Physical space requirements should include standard library climate controls, a loading dock, an alarm system, adequate lighting, a small reading/research area, and a workstation with Internet access and scanning capabilities. There should be minimal or no external windows and no activated fire sprinklers inside the facility.

   “... remote storage is most economically advantageous if retrieval and delivery are kept to a minimum” (Kruger, 2003, p. 48).
a. **Retrieval of materials.** Retrieval specifics will be dependent upon where the storage facility is located and how the materials will be organized and shelved. Based on the size of facility or space acquired, and the type of shelving installed, materials could be arranged in call # order, by like-size, or perhaps mixed in bins. They could be housed on standard library shelving or placed on shelves 30 feet high. Once these factors have been determined, library staff will decide whether or not an additional barcode system should be implemented; how the materials will be physically retrieved from the shelves (i.e. cherry picker forklift); and how the individual items will be identified for shelving and potential circulation (i.e. cataloging notes, accession numbers, cover bands). There are many remote storage models, policies, and procedures in existence that should be considered by a library-wide remote storage planning team as the initiative moves forward. Nine of our fourteen institutional peers have library remote storage facilities, and two additional have some alternative storage option available for their collections (addendum #1).

"Policies and procedures in storage facilities must focus on making access to their holdings as easy and seamless as possible” (Kruger, 2003, p. 50).

**A transparent request and retrieval process.** Procedures that require minimal processing, fast retrieval, and rapid delivery should be established. To meet these criteria, it is recommended that requests be initiated and processed through the ILLiad Request It! system. Requested articles could be scanned directly from the storage facility and delivered to the requestor’s desktop. Alternatively, the physical item could be pulled and taken to the Library for pick up. For eligible requestors, physical items could be delivered by courier to their campus office via Request It Delivers! Turnaround time would vary from one day to a week, based primarily upon where the facility is located and available staff resources.

**Additional planning considerations.** As stated in the introduction, the recommendations provided in this report are preliminary. It is strongly recommended that this Workgroup continue to meet regularly as the Library escalates collection offloads from the upper floors, relocates collections, shifts collections, and identifies/processes withdrawals where deemed appropriate. An offloading project will be a library-wide effort, requiring that staff is afforded the time and ability to effectively plan, implement, and garner input from internal and external constituents. Among other considerations, a project of this size and scope will require an identified project manager, additional staff or student employee resources; adequate workspace for processing and temporarily storing offloads and withdrawals; and shelving and seating capacity analyses.

At this time, the Library manually counts in-house use of materials (tallies). It is further recommended that scanning technology is re-implemented for gathering
in-house usage statistics. The usage data collected needs to be at title and item levels in order for staff to make informed decisions regarding withdrawals and/or relocations—now and in the future.

There are special handling and storage considerations for Archival materials that must be shifted within Branson in order to be compliant with floor load requirements, as well as for those materials targeted for remote storage.

b. **Communication strategies.** To ensure the overall success of the project and to carry out its mission, it is essential that the Library proactively inform its constituents about the offloading project. Many library users will be opposed to withdrawals or relocations because they will no longer have immediate access to information they consider vital to their research. Users may fear that requesting procedures will be cumbersome, retrieval times will be too lengthy, and they will not know what titles actually reside in storage. Similarly, it is often felt that storage precludes browsability within the collection, thus inhibiting unexpected discovery. Increasingly, however, many users are unconcerned about the physical location of materials, as long as they can gain access to the content. Because of a wide range of beliefs likely held by our constituents regarding collection access, it is incumbent upon the Library to alleviate fears by articulating a “user focus” that begins with effective communication.

The Workgroup recommends the development of communication strategies before, during, and after the offload/storage initiative, including how and why decisions are being made (to include floor load issues and the status of the “2 million volumes by 2012” campaign) and the establishment of reasonable timelines that allow for planning and sufficient vetting to occur with regard to collections withdrawals and moves. Communication strategies should more specifically include:

- Emails and letters
- A project website
- White board messages at the front doors
- Signage in book stacks and on affected upper floors
- Video snippets/information on the Library’s kiosk
- Meetings and celebrations
- Campus and other library publications
- Notes in OPAC records will also inform users about location changes
- Assessment of communication strategies employed throughout the initiative is also recommended.

November 8, 2010
2. **Propose a revised Withdrawal Policy (No. 13).**

Please refer to proposed Withdrawal Policy revisions (addendum #2).

a. **Address disposition of materials, such as de-accessioning and recycling.**

In alignment with NMSU Library Collection Development Principles (Policy No. 024) and related policies and procedures, deselected materials will be disposed of in accordance with State of New Mexico inventory control procedures. The members of this Workgroup, including the Collection Development Coordinator, support a multi-pronged approach to offloading materials from the Library’s collection, one of which includes the withdrawal of low-use and multiple copies. The *Multiple Copy De-Selection Project* document contains principles, guidelines, and procedures that will help ensure appropriate withdrawal and retention decisions (addendum #3).

**Withdrawals**—Upon completion of internal de-accessioning processes, materials will be boxed for pick up by an OFS labor crew that will pallet and shrink-wrap the boxes, and then deliver them to the OFS warehouse for periodic auction. The Workgroup strongly recommends that the Library seek approval from NMSU Purchasing to have 95% of the proceeds from the sale of withdrawn materials, to be returned to Library.

As outlined in the Library’s Withdrawal Policy, all federal government publications are subject to disposal regulations as specified in published Instructions to Depository Libraries. New Mexico State documents are subject to disposal regulations as specified in the published Manual for New Mexico State Depository Libraries. Any documents that can be recycled will be disposed of by OFS/Aggie Recycling.

3. **Review current Gifts Policy (No. 22) for compatibility with the Withdrawal Policy.**

Work will continue on revising gifts procedures. One change that has been enacted since floor load issues were raised is that the Library is no longer keeping added copies for review. The only exception to this new procedure is when the shelf copy has circulated more than twice per year since it was added to the collection, and has been checked out at least once in the past year.

For all other intents and purposes the current Gifts Policy is compatible with the proposed/revised Withdrawal Policy.

4. **Provide a prioritized list of items (by category) that would be candidates for withdrawal.**

(see also addendum #4)
General Philosophy - Collections

The Library should strenuously seek out storage solutions prior to discarding materials. This is especially important as the Library continues to lose access to electronic subscriptions and collections due to budget reductions. The 2010 library materials collection reduction project saw a loss of 45% of its subscriptions—both print and electronic—and faces further materials budget reduction in the near future. The Library’s subscriptions, including its database subscriptions, are threatened. Loss of these research access points will have a chilling effect on the entire research climate at the University for current and historic information.

General Philosophy - Government Documents

As a member of the Federal Depository Library Program (FDLP), the NMSU Library affirms its commitment to providing long-term, free, public access to government information to all residents of the 2nd Congressional District of New Mexico. In determining the appropriate format for depository materials (tangible or electronic), depository librarians consider community needs as well as the requirements of the FDLP program. For tangible collections, depository libraries are required to provide adequate space to properly house and protect materials in the collection. For electronic collections, depository libraries are legally obligated to ensure that substitutions are official, complete, and available free of charge. The FDLP further requires that depository libraries which substitute electronic materials for tangible materials provide adequate staffing and resources (hardware/software) to facilitate access to those materials.

Prioritized List of Candidates for Withdrawal

Multiple copies—Items with low-to-no use will be withdrawn after review by relevant Subject Specialists and the Collection Development Coordinator beginning mid-November 2010. Criteria for deselection include evaluation of the item’s condition and number of copies held. Recently developed procedures are outlined in the Multiple Copy De-Selection Project document (addendum #3). Deselection decisions for all classification areas will be completed by May 2011.

Selected Indexes & Abstracts—Many of the Library’s most heavily used indexes and abstracts are available electronically through vendor subscriptions. For these sets spanning several decades, the Library does not own the electronic content outright. Losing access to these electronic subscriptions would be catastrophic; thus, the Library could withdraw corresponding print volumes, but only with the commitment to maintain subscriptions to electronic counterparts.

Decisions to deselect selected indexes and abstracts were made by subject specialists based on criteria developed by the Collection Development Coordinator. Rationale for retaining titles was required as part of the process (addendum #5). Withdrawal of

November 8, 2010
deselected indexes & abstracts may begin immediately following the Government Documents move(s). It is also recommended that retained indexes & abstracts should continue to be stored in boxes on the first floor of Branson Library, until a remote storage option is available.

Government Documents—Federal government documents are currently being relocated to the first floor of Branson library. Superseded items and serials for which there are stable online alternatives have been deselected. Outdated materials in specific call number areas such as HE and TD have been deselected. The process of deselection will continue after the move, focusing on pre-76 materials. 1,950 linear feet of Congressional Hearings have been slated for storage. Hearings will be selectively withdrawn as the pre-76 project continues. To date, five linear feet of Hearings have been withdrawn and put on the required Needs & Offers list. Other materials are also currently moving through the N&O process. Also targeted for withdrawal are 42 linear feet of State documents. Multiple copies of State documents will be withdrawn after the collection is relocated to Branson 1st floor.

Selected Large Sets in Zuhl & Branson Libraries—Many of these large sets are promising candidates for withdrawal; however, each title needs vetting with a wider audience that includes subject specialists and other campus stakeholders. Withdrawal recommendations will be completed by May 2011.

JSTOR Titles—Although the Library’s JSTOR titles appear to be candidates for withdrawal, remote storage is strongly recommended as the first option. Any decision relating to JSTOR will require vetting and discussion within a larger audience prior to removal or relocation of these volumes. Electronic access to our JSTOR titles is not assured. In 2007 the Library prepaid for five years of JSTOR annual access and this access fee is no longer a line item in our annual subscription budget. The Library must make a firm and public commitment to supporting these four collections (Arts & Sciences I, II, III and Biology) prior to considering withdrawing titles found therein. The Collection Development Coordinator will immediately undertake a review of JSTOR retention practices at peer institutions and provide findings to the Library Dean.

“Libraries remain the sole providers of half a millennium’s worth of print-based human knowledge. It is thus incumbent upon them to integrate print and electronic resources wisely” (Kruger, 2003, p. 54).

5. Develop criteria for the relocation of materials to remote storage.
   (see also addendum #4)

   Well-chosen criteria will result in less demand for remote storage materials (L. Weikel, personal communication, March 12, 2010)
Criteria:

- Appropriate vetting will occur prior to relocating (or withdrawing) materials
  - Title-by-title determinations by Subject Specialists should be undertaken, based on usage and/or value to a specific discipline
  - Constituents will have a reasonable level of “veto power” with appropriate justification if they wish to prevent a title from relocating to storage
- Repatriation” of titles from storage back into the circulating collection will be an option, based on criteria to be established
- Materials that are low-use, but of continued importance, will be strong candidates for remote storage
- Age of materials, in some cases, may determine eligibility
- Damaged or deteriorating materials will not be included
- Electronic access coverage will weigh heavily on storage decisions
- Large, low-use archival collections, particularly those with little or no donor support, will be candidates
- Further consideration will be given to other large, low-use collections, such as pre-2000 bound volumes (or earlier) or dead/cancelled serials that will reduce floor loads and free up significant space on Branson and Zuhl upper floors
- Periodic assessment of remote storage access, usage, and operations is highly recommended

6. Develop a mechanism to record and report linear feet offloaded from the floors.

Floor offloads are already being recorded and reported, and will continue until the Library is in compliance with OFS recommendations, and related moves and shifts are completed. Technical Services, Government Documents, and Archives staff are currently recording offload and withdrawal data at departmental levels, and providing weekly to periodic updates to Access Services staff who are updating a compiled spreadsheet on the G:drive. Access Services, in constant communication with Library Administration and the Collection Development Coordinator, will monitor and share the data broadly, as collections, floor loads, and designated library spaces are impacted.

Respectfully submitted by members of the Library Collection Management Workgroup:

Norice Lee, Workgroup Chair and Department Head of Access Services; Susan Beck, Collection Development Coordinator; Steve Hussman, Department Head of Archives & Special Collections; Paula Johnson, Engineering Librarian; Paula Kilgore, Shelving Manager; Liz Miller, Cataloging Librarian; Dotty Ormes, Government Documents & Maps Librarian; Ingrid Schneider, Metadata & Authority Control Librarian

November 8, 2010
References


November 8, 2010
ADDENDUMS
Remote Storage at Peer Institutions

Colorado State University – yes
Iowa State University – yes
Kansas State University – yes, housed at University of Kansas in Lawrence
Montana State University – don't currently need remote storage
Oklahoma State University – yes
Oregon State University – yes
Texas Tech (Lubbock) – yes
University of Arizona – no
University of Idaho – no, store some items in the basement
University of Nevada – yes
UTEP – some items in a warehouse next to the Library
Utah State University – yes
Washington State University – no
University of Wyoming - yes
Withdrawal Policy

Policy No: 013
Approval Date: 11/5/03
Historical Notes: Proposed revisions highlighted below—Nov. 2010

Policy:

New Mexico State University Library on a routine basis withdraws items from its collections in accordance with State of New Mexico inventory control procedures.

 Procedures:

Items are withdrawn from the collections based upon the criteria below:

1. Items that have been damaged beyond repair due to wear and tear, mutilation or deterioration.
2. Items which under our circulation policies have been officially declared missing, e.g., lost, missing in inventory, etc.
3. Items that have been superseded or are obsolete.
4. Number of copies that are useable. As a rule of thumb, the library does not retain more than two copies of a specific title.
5. Items in hardcopy that we have converted to other stable formats.
6. All federal government publications are owned by the Government Printing Office and are supplied to depository libraries free of charge under the Federal Depository Library Program. They are subject to disposal regulations as specified in published Instructions to Depository Libraries. These include secondary copies, e.g., duplicates (including reprints), superseded (including preprints), unrequested documents sent from the Government Printing Office by mistake, etc.
7. All government publications supplied to depository libraries under the State of New Mexico Depository Program are subject to disposal regulations as specified in the published Manual for New Mexico State Depository Libraries.
MULTIPLE COPY DE-SELECTION PROJECT

General principles
The NMSU Library retains one circulating copy of a print title. For titles that are high use, it may retain more than one copy. The Library will periodically review retention practices for multiple copies.

General de-selection guidelines
1. Titles that have not circulated at all within the past 5 years, at least one copy is deselected. The copy in the best physical condition is retained. If both copies are in similar condition, deselect copy 2, retain copy 1.
   a. Titles with 3 copies, 2 copies are deselected, 1 copy is retained unless otherwise indicated on spreadsheet (5 copies retain 2; 7 copies retain 3)
   b. Titles with 4 or more copies, half of the total of all copies are retained (4 copies, retain 2; 6 copies retain 3) unless otherwise indicated on the spreadsheet.
2. Titles with high circulation counts are examined for retention. This is especially important for those that have a high number of circulation counts over a long time period indicating a title that is much needed in the collection. In these and in other cases, the Collection Development Coordinator and appropriate Subject Specialist(s) will remove multiple copy titles from the De-Selection pick list for a variety of reasons:
   --Title shows a high number of circs over time with continued high use. High number of circs is defined as more than one circ a year per copy from the time the copies were added.
   --Title shows a high number of circs although not many recently; yet topic (e.g., NMSU research topic of interest, NM history, etc.) requires the Library to retain multiple copies.
   --Title is of primary importance to the library’s collection (flood control in NM, folk tales in NM, etc.)
3. Subject specialists need to take the following actions before removing titles from the De-Selection lists:
   --Check if SpC has a copy. Only remove title from the De-Selection list if SpC doesn’t have a copy. This is especially important when the title may have local value but it has low or no circs.
   --Check for other holdings on the same topic if title is high interest or hot topic, etc. Remove the title from the De-Selection list only if the Library has other titles in this area.
   --Check WorldCat to see how many other copies are held in the state. Remove the title from the De-Selection list only if fewer than 15 copies are held in the US.
   --Go to the shelves and physically examine the item. Just because few libraries own the item does not necessarily mean that NMSU Library should retain the work.
Procedure:

1. Technical Services creates lists of multiple copies in the circulating collection by general LC classification letter. The list is sorted by call number and includes decision-making criteria such as number of times the items has checked out, the last date the item circulated, volume or part number of item, etc.

2. Collection Development Coordinator reviews the lists, deleting items from the De-selection list as necessary (see Guidelines #3 above).

3. Subject Specialist reviews lists and provides the Collection Development Coordinator with the line # of the items to retain and the rationale (see Guidelines #3 above).

4. Three student assistants pull items on De-selection List.

5. Student One has the weeding list on a clipboard and reads the complete call number. Student Two retrieves the items and reads aloud the title as a way of checking correct retrieval of item. Together Student Two and Student Three compare physical condition of the multiple copies. Specifically they check
   a. Condition of spine—Note tearing, fraying
   b. Condition of cover & end boards—Note loose hinges.
   c. Pages—Note highlighting, pencil marks, tears, yellowing
   d. Format—Paperback or hardback

6. The more physically worn item(s) are placed on the cart in call # order. Student Two announces which copy is being weeded and Student One checks that copy off on the Pick List.
   a. If both copies are in similar condition, retain copy 1.
   b. If one or more copies of the title is not on the shelf, Student One notes NOS in the first column
   c. If the list shows both copies as copy 1, match the item number ‘or the weeded copy

7. Books are wheeled on trucks to TS/Cataloging.

8. Staff member takes spreadsheet and checks to ensure items listed on spreadsheet match items on book truck.

9. Cataloging Unit personnel withdraws items following the Unit’s Withdrawal procedures.

10. Books are sent to Branson 2nd floor shelves by loading dock to then be boxed and shipped to OFS warehouse to be sold at auction.

Spreadsheet columns

ITEM ENUMATION—Different volumes within a title or different parts within a title.

HISTORICAL CHARGES—Shows the number of times an item has circulated, approximately March 1985 (when the library switched to its first online system, VTLS) to October 2010.

LAST CHECK-IN DATE—Displays the the most recent date the item was checked out. In cases where there are no historical charges and the last check-in date is the same as the date that the item was added means that the item has never been checked out.

DATE ITEM ADDED—Displays the date that the item was added to our library system.

BARCODE—This is the unique number to check out the item.

Bib-ID—This is an id number for one bibliographic item. That one bib item can have many parts (vol, parts, etc.). Thus one Bib-ID could have many barcodes, many MFHD IDs, many item IDs.
MFHD ID—Referred to as "muff heads" in conversation. This is essentially the Voyager holdings ID number.

ITEM ID—Voyager ID number for the item.

NORMALIZED CALL NO—This call number provides spacing so the list can be sorted in correct call number order. The Display Call Number column will not sort in shelf order.

\[1\] The obvious column headings are not described here (e.g., display call number, title, copy number)
## Collection Management Task Force - Fall 2010

<table>
<thead>
<tr>
<th>Categories</th>
<th>Targeted Offload/Relocate</th>
<th>Actual Offload</th>
<th>Targeted Withdraw</th>
<th>Actual Withdraw</th>
<th>Targeted Remote Storage</th>
<th>Library</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Archives</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1,000 l.f./yr</td>
<td>Branson</td>
<td>Some collections already shifted due to floor load concerns</td>
</tr>
<tr>
<td>Deselected (damaged, misc.)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Branson</td>
<td>5-year average = 531 items withdrawn per year*</td>
</tr>
<tr>
<td>Federal GovDocs</td>
<td>5,115 l.f./offload</td>
<td>5,001 l.f.</td>
<td>66 l.f./yr</td>
<td></td>
<td>1,950 l.f.</td>
<td>Branson</td>
<td>Offload from Branson 2nd to 1st floor</td>
</tr>
<tr>
<td>Indexes &amp; Abstracts</td>
<td></td>
<td></td>
<td>300 l.f.</td>
<td>203 l.f.</td>
<td>815 l.f.</td>
<td>Branson</td>
<td>Low use titles temporarily stored on 1st floor</td>
</tr>
<tr>
<td>JSTOR</td>
<td></td>
<td></td>
<td>1,428 l.f.</td>
<td></td>
<td></td>
<td>Branson</td>
<td>Retain selected titles due to long-term access concerns</td>
</tr>
<tr>
<td>Large Sets</td>
<td></td>
<td></td>
<td>Unknown</td>
<td>3,146 l.f.</td>
<td></td>
<td>Branson</td>
<td>Retain selected titles due to long-term access concerns</td>
</tr>
<tr>
<td>Multiple Copies (estimate)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>5,791 l.f.</td>
<td>Branson</td>
<td>Deselection started October 2010</td>
</tr>
<tr>
<td>New Mexico State Docs</td>
<td>1,254 l.f./offload</td>
<td>42 l.f.</td>
<td>3,000 l.f.</td>
<td></td>
<td></td>
<td>Zuhl</td>
<td>Offload from Zuhl 2nd to Branson 1st floor</td>
</tr>
<tr>
<td>Recent Acquisitions &amp; Bindery</td>
<td>233 l.f./relocate</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Branson</td>
<td>Must integrate into collections on upper floors</td>
</tr>
<tr>
<td>Business</td>
<td>8,304 l.f./relocate</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Zuhl</td>
<td>Relocate from Branson 2nd floor to Zuhl 2nd floor</td>
</tr>
<tr>
<td><strong>Offloaded &amp; Withdrawn Totals</strong></td>
<td>14,906 l.f.</td>
<td>5001 l.f.</td>
<td>4,836 l.f.</td>
<td>203 l.f.</td>
<td>12,702 l.f.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Other Considerations:
- **Bound Vols. Pre-2000**
  - 48,769 l.f.**
  - Option to consider: 35,295 l.f. Branson; 13,474 l.f. Zuhl

- **Collection Growth**
  - ADD 2,264 l.f. per year (combined library total)
  - 3 yrs growth=6,792 l.f.; 5 yrs=11,320 l.f.; 10 yrs=22,640 l.f.

- **Offload Needs**
  - 22,516 l.f. (total based on "removing top shelves")
  - Reconfigure sections & ranges to accommodate floor loads

- **Vacated Tech Services Space**
  - GAIN 12,564 l.f.

**TARGET OFFLOADS PER OFS=**

- 22,516 l.f. + 11,320 l.f. for 5 yrs. growth = 33,836 l.f.
- Branson = 18,150 l.f.; Zuhl = 15,686 l.f.

*Average monograph width calculated @ 1.5"*

**Average journal volume width calculated @ 2.0"*

November 2010
Folks,

As you know our floorload problem in both buildings has necessitated that several unplanned but very important projects be initiated this fall. One of these is deciding what to do with the boxed indexes and abstracts. This collection used to reside primarily in Zuhl Reference but was moved and boxed up about two years ago so that the space this collection occupied could be transformed into student study space. The boxed indexes and abstracts have been moved from the Current Periodicals Reading Room where Gov Docs will be relocated to the long office cubicle formerly occupied by CEIBEL. Because that space will also be needed by Gov Docs we need to decide what to do with this boxed collection. By the way, we have had only a few requests to access materials in this collection in the past two years.

Your assistance is needed to help decide what to do with the indexes and abstracts.

Please review the attached spreadsheet (Master.xls) and note titles in your call number range (see AssignmentsByCallNumber.xls). The Master.xls spreadsheet lists the title, call number, online availability, 3 options and notes. Please choose one option for titles in your call number area.

#1=OK to withdraw; content is available at NMSU Library from stable e-resource
#2=Please retain (if you choose this option please provide rationale in the Notes column)
#3=Electronic backfile available from <please provide source> for <$X> If selecting this choice, you can contact Grace or Ellen to obtain pricing

when making choices please put your initials in the corresponding column. Molly, Mardi, Susan and Sarah can work out more descriptive initial combinations.

There are a lot of A and Z indexes. Please review the Zs that fall within your subject area. Susan, Cindy P and Alisa will review the general As and Zs. If you feel strongly about a specific index set in the A's or Z's go ahead and provide your recommendation but please fill in the Notes column to explain your position.

We are working under a time crunch so please finish this project by Monday October 18, 2010. You can send me your finished spreadsheet saved with your initials as part of the filename (e.g., MasterSB.xls) or you can deposit it at g:\Remote Storage\Prep\IndexesAndAbstracts.

We will discuss this and other projects at the Subject Specialists meeting this coming Monday.

Thanks, in advance, for your help with this project. I know that we are all busy but this is one project that is top priority.

Susan

~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
Susan E. Beck
Professor & Collection Development Coordinator New Mexico State University Library MSC 3475
Box 30006 Las Cruces NM 88003-8006
575-646-6171 (o) 575-646-3390 (f)
~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
"To every complex problem there is a simple answer: neat, plausible, and wrong" H.L. Mencken
<table>
<thead>
<tr>
<th>TITLE</th>
<th>CALL #</th>
<th>online</th>
<th>#1</th>
<th>#2 (need rationale)</th>
<th>#3</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>New York times index.</td>
<td>AI21 N489i</td>
<td>yes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ALA index</td>
<td>A13 .A3 1971</td>
<td>no</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cumulated magazine subject index, 1907-1949;</td>
<td>A13 .C76</td>
<td>no</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>periodical literature, March</td>
<td>A13 .C84</td>
<td>no</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>periodical literature, March</td>
<td>A13 .C84 1979</td>
<td>no</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Humanities index.</td>
<td>A13 .H35</td>
<td>yes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>by and about Blacks.</td>
<td>A13 .O4</td>
<td>no</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Index to selected periodicals received in the</td>
<td>A13 .O4</td>
<td>no</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Index to periodicals 1965-1972 in the Library</td>
<td>A13 .R6 1973</td>
<td>no</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Social sciences index.</td>
<td>A13 .S62</td>
<td>yes/soc index</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Victorian periodicals, 1824-</td>
<td>A13 .W45</td>
<td>no</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Victorian periodicals, 1824-</td>
<td>A13 .W45</td>
<td>no</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>periodicals.</td>
<td>A13 I8</td>
<td>yes/soc index</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Humanities index.</td>
<td>A13 I8</td>
<td>yes/soc index</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Technical abstracts.</td>
<td>AM1 Ar75a</td>
<td>no</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Playboy index.</td>
<td>AP2 .P695-</td>
<td>no</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>international</td>
<td>AS30 .D63</td>
<td>yes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dissertation abstracts.</td>
<td>AS30 .D63</td>
<td>yes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>international.</td>
<td>AS30 .D63 Cum. Index</td>
<td>yes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>catalog of selected international.</td>
<td>AS30 M393a</td>
<td>yes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>publications of the Rand</td>
<td>AS36 .R332</td>
<td>yes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Selected Rand abstracts.</td>
<td>AS36 R152</td>
<td>yes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Philosopher's index.</td>
<td>B1.A1 P45</td>
<td>yes/1940-</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>to Psychological abstracts.</td>
<td>BF1 .P652</td>
<td>yes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Author index to Psychological index, 1894</td>
<td>BF1 P9593</td>
<td>yes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
MEMORANDUM

TO: Susan Beck, Collection Development Coordinator  
    Steve Hussman, Department Head of Archives & Special Collections  
    Paula Johnson, Engineering Librarian  
    Paula Kilgore, Shelving Manager  
    Liz Miller, Cataloging Librarian  
    Dotty Ormes, Government Documents & Maps Librarian

FROM: Norice Lee, Head of Access Services – Workgroup Chair

DATE: September 1, 2010

SUBJECT: Collection Management Workgroup

You have been appointed by the Dean of the Library and have agreed to serve on a workgroup charged with:

*Responding to the challenge of offloading library materials, based on the 2010 Bohannan Huston - NMSU Branson Library Floor Loading Study and subsequent OFS recommendations, by investigating remote storage options, reviewing and revising collections-related policies, and developing categories and general criteria to be applied in the withdrawal or relocation of library materials to remote storage.*

The Collection Development Workgroup will:

1. Identify remote storage options and other planning considerations including--
   a. Retrieval of materials
   b. Communication strategies
2. Propose a revised Withdrawal Policy (#13)
   a. Address disposition of materials, such as de-accessioning and recycling
3. Review current Gifts Policy (#22) for compatibility with the Withdrawal Policy
4. Provide a prioritized list of items (by category) that would be candidates for withdrawal
5. Develop criteria for the relocation of materials to remote storage
6. Develop a mechanism to record and report linear feet offloaded from the floors

The deadline for completion of the above charge is November 1, 2010. You will soon be contacted regarding the date and time of our first meeting. A copy of the Bohannan Huston report is available on reserve at the Zuhl Service Desk for your review. Additional floor-load information will be provided at our first meeting. Thank you for agreeing to serve on this important and time-sensitive workgroup. I look forward to addressing these critical issues with all of you in the weeks and months ahead.

cc: Elizabeth Titus, Library Dean  
    David Baldwin, Associate Library Dean
Library Policies and Procedures

<table>
<thead>
<tr>
<th>Policy:</th>
<th>Collection Development Principles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Policy No:</td>
<td>024</td>
</tr>
<tr>
<td>Approval Date:</td>
<td>November 29, 2005</td>
</tr>
<tr>
<td>Historical Notes:</td>
<td></td>
</tr>
</tbody>
</table>

Policy:
The New Mexico State University Library will have established, written collection development principles on which it acts.

Principles:
The primary purpose of the Library’s collection development program is to fulfill the University’s ongoing needs for information resources that support its fundamental land grant university mission in teaching, research, and service. The program also expands and strengthens core resources; keeps resources current with advances in information technology; provides basic support for the information needs of the University’s non-academic units; and partners with others in the research library community to facilitate exchange of scholarly information at the state, national, and international efforts.

The activities of the collection development program include the ongoing identification, selection, acquisition, and de-selection of current and retrospective materials, including gifts-in-kind, to build the Library’s collections. Other activities include planning and instituting rational approaches to consistently provide access to information resources matching our users’ needs, and conducting ongoing assessments of collections and resources to determine their suitability in meeting user needs.

Two overarching characteristics of New Mexico State University are transformation and change. It is these same characteristics that influence the development of collections and services within the library system. In doing so, the Library adapts as it responds both to changes in the university and to external changes. Therefore, its collection development practices must remain flexible enough to engage both the response to and anticipation of a changing society and its corresponding university community.

Process:
In order to maintain a successful collection development program, to provide current and useful description of the collection and to develop a structure for collection assessment projects:
- Subject specialists are responsible for writing individual collection development statements, representing their assigned subject areas;
- Collection development statements are submitted to the Collection Development Coordinator for approval;
- The Collection Development Coordinator is responsible for sharing widely all collection development statements with the University community;
- All interested parties are encouraged to provide input, as appropriate, in the development of collection development statements;
- Collection development statements are revised regularly, optimally every 3 years.
Library Policies and Procedures

<table>
<thead>
<tr>
<th>Policy:</th>
<th>Gifts Policy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Policy No:</td>
<td>022</td>
</tr>
<tr>
<td>Approval Date:</td>
<td>June 11, 2008</td>
</tr>
</tbody>
</table>
| Historical Notes: | NMSU Business Policy Manual Section 1C.05.15  
|                 | Archives Appraisal Guidelines for Records, Policy No: 012 |

Policy:
The New Mexico State University Library welcomes gifts that enhance the Library’s ability to support the learning, teaching and research missions of the University. Both monetary donations and gifts of books or other information provide an invaluable supplement to the service mission of the library. Over the past century, donors have added immeasurably to the growth of the Library’s collections.

Procedures:

ACCEPTANCE OF GIFTS
Gifts are accepted with the understanding and agreement that the Library makes all of the necessary decisions as to retention, use, and disposition.

Monetary Gifts
Individuals wishing to give monetary gifts for the purchase of materials should contact the Director of Development for the NMSU Library at 575-646-3642; or via e-mail at development@lib.nmsu.edu.

Gifts-In-Kind
Those wishing to donate books, periodicals, and non-print media should contact the Gifts Program Coordinator at 575-646-6171 or 575-646-6297; or via e-mail at gifts@lib.nmsu.edu.

Gifts to Archives and Special Collections:
Donors seeking to offer materials to Archives and Special Collections should contact the department head at 575 646-4756; or via e-mail at archivesgifts@lib.nmsu.edu.

APPRaisALS
The Library acknowledges gifts through a brief, general description of the materials. This acknowledgement is sent to the donor but does not include an itemized bibliographic listing of donated items or a monetary evaluation. The Library is prohibited from appraising gifts for federal...
tax purposes. To obtain an appraisal of their gift, we suggest that donors contact professional appraisers or local book dealers before making the donation. (SEE ALSO: Archives and Special Collections Guidelines for Records)

GIFTS-IN-KIND
NMSU Library accepts gifts that will benefit its users and strengthen its collections. The Library is particularly interested in receiving items that fit its collection strengths and that are representative of the University's academic programs and areas of research.

**Considered for Acceptance**
- High quality hardcover books
- High quality paperback books
- Journals (see specific requirements)
- Maps
- Music scores
- Purchased audio visual materials (e.g., videos, dvds and cds)
- Local or regional history materials

**Generally Not Considered**
- Mass market paperbacks
- Used textbooks
- Popular magazines (see specific requirements)
- Newspapers
- Personally copied items (photocopies, videos, dvds, cds)
- Desk copies
- Publishers' advance copies
- Items in poor physical condition

**Desired subjects areas**
- U.S.-Mexico Border
- New Mexico and local history
- Latin America
- History of the Rio Grande Valley
- Engineering
- Aerospace studies
- Water resources
- Chile peppers
- Land and range management
- Sustainable agriculture
- Social justice
- Nursing
- Education
- Social work
- Marketing
- Agricultural economics
- NMSU Extension Program
- Federal or New Mexico state documents.

For questions about donating a specific item, please contact the Gifts Program Coordinator at 575-646-6171 or 575-646-6297; or via e-mail at gifts@lib.nmsu.edu.

In cases where an individual would like to donate items that fall outside the usual formats typically donated to libraries (e.g., books, journals, audio visual materials) such as equipment, furniture, software, etc., individuals are encouraged to contact Library Administration at 575-646-1508.

The Library adheres to all federal regulations governing Internal Revenue Service gifts-in-kind. It also respects and abides by the Donor's Bill of Rights as outlined by the NMSU Foundation.
DISPOSITION OF ITEMS
Donated items are received with gratitude but without obligation. The Library seeks to maintain high standards of collection quality and appropriateness. In doing so it carefully reviews each donated item before deciding to add it to the collection. Some donated materials may be offered to other libraries or disposed of at the discretion of the library (13-6-1 NMSA 1978).

If not accepted, the Library disposes of donated items in this order:
1. Items are offered to other libraries
2. Items are offered to institutions in the Republic of Mexico
3. Items are transferred to the University’s Office of Facilities and Services to be sold by auction or sealed bid.

DONOR RECOGNITION
Donors are recognized with an official letter thanking them for supporting the Library with a brief description of the item(s) donated.

SPECIFIC POLICIES RELATING TO ARCHIVES AND SPECIAL COLLECTIONS

APPRaisal GUIDELINES FOR RECORDS
When the Archives and Special Collections Department at NMSU Library evaluates adding records to its collections, it follows specific appraisal guidelines. These guidelines are conducted for informational purposes and document the historic value of the donated collection. See http://lib.nmsu.edu/aboutlib/policies/policy012.shtml

DEED OF GIFT
Deeds of gift are completed on all items donated to the Archives and Special Collections Department. The NMSU Library no longer accepts gifts, collections, or materials placed “on deposit.”

DONOR’S RIGHTS
The Library adheres to the Society of American Archivists principles regarding donors’ rights.

RESTRICTED ACCESS TO COLLECTIONS
The Archives and Special Collections Department strives to make its collections as widely available and accessible as possible; however, there may be certain circumstances that restrict access to its collections. The Department Head for Archives and Special Collections decides the conditions that govern restricting access to collections (e.g., item too fragile).
## Low-Use Collections for Remote Storage

**Branson - Zuhl**

<table>
<thead>
<tr>
<th>Linear Feet - Year 1</th>
<th>Indexes &amp; Abstracts</th>
<th>JSTOR</th>
<th>Misc. per Coll Dev</th>
<th>Archives</th>
<th>LibSys5</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2,423</td>
<td>3,146</td>
<td>5,791</td>
<td>1,000</td>
<td>1,000</td>
<td>13,360</td>
</tr>
</tbody>
</table>

### Growth in Linear Feet

<table>
<thead>
<tr>
<th></th>
<th>Year 2</th>
<th>Year 4</th>
<th>Year 6</th>
<th>Year 8</th>
<th>Year 10</th>
</tr>
</thead>
<tbody>
<tr>
<td>18,114 vols. per year</td>
<td>4,529</td>
<td>9,057</td>
<td>13,566</td>
<td>18,114</td>
<td>22,643</td>
</tr>
<tr>
<td>Add Archives &amp; LibSys5</td>
<td>480</td>
<td>960</td>
<td>1,440</td>
<td>1,920</td>
<td>2,400</td>
</tr>
</tbody>
</table>

@ 120' per yr. each

### Growth Totals

<p>| | | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Growth Totals</td>
<td>5,009</td>
<td>10,017</td>
<td>15,026</td>
<td>20,034</td>
<td>25,043</td>
</tr>
</tbody>
</table>

### ADD ALSO LIBRARY STORAGE & WORK SPACE

<table>
<thead>
<tr>
<th>Collection Growth</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>18,114.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>27,171.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Average # of vols. added in last 5 years

- Multiplied by 1.5" per volume for space

### 2,264.25 Linear feet per year

- Linear feet needed for 2 years future growth

- Linear feet needed for 4 years future growth

- Linear feet needed for 6 years future growth

- Linear feet needed for 8 years future growth

- Linear feet needed for 10 years future growth

---

April 22, 2010 -- nl
<table>
<thead>
<tr>
<th></th>
<th>Indexes &amp; Abstracts</th>
<th>JSTOR</th>
<th>Misc. per Coll Dev</th>
<th>Archives</th>
<th>LibSys5</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Linear Feet - Year 1</td>
<td>2,423</td>
<td>3,146</td>
<td>5,791</td>
<td>1,000</td>
<td>1,000</td>
<td>13,360</td>
</tr>
<tr>
<td>Growth in Linear Feet</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18,114 vols. per year</td>
<td>4,529</td>
<td>9,057</td>
<td>13,586</td>
<td>18,114</td>
<td>22,643</td>
<td></td>
</tr>
<tr>
<td>Add Archives &amp; LibSys5</td>
<td>480</td>
<td>960</td>
<td>1,440</td>
<td>1,920</td>
<td>2,400</td>
<td></td>
</tr>
<tr>
<td>@ 120’ per yr. each</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Growth Totals</td>
<td>5,009</td>
<td>10,017</td>
<td>15,026</td>
<td>20,034</td>
<td>25,043</td>
<td></td>
</tr>
</tbody>
</table>

ADD ALSO LIBRARY STORAGE & WORK SPACE

| Collection Growth         | 18,114.00           |       |                    |          |         |
|                          | 27,171.00           |       |                    |          |         |
| Linear feet per year     | 2,264.25            |       |                    |          |         |
| Linear feet needed for 2 years future growth | 4,528.50 |       |                    |          |         |
| Linear feet needed for 4 years future growth | 9,057.00 |       |                    |          |         |
| Linear feet needed for 6 years future growth | 13,585.50 |       |                    |          |         |
| Linear feet needed for 8 years future growth | 18,114.00 |       |                    |          |         |
| Linear feet needed for 10 years future growth | 22,642.50 |       |                    |          |         |