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Unsettling the Library Catalog: A Case Study in Reducing the Presence of "Indians of North America" and Similar Subject Headings
Karl Pettitt and Erin Elzi

Clear the Floor: One Library's Approach to the Removal and Integration of Items from Two Print Journal Collections
Robyn M. Gleasner

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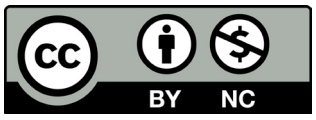

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Editorial

Around the Sun

Michael Fernandez

The previous issue of *LRTS* marked an important milestone, as it was the first to be published fully open access. While being the "second fully OA issue" is not necessarily noteworthy, this issue is something of a personal milestone for the current editorial team, as it marks the first full year since we have taken over the reins at *LRTS*. Much of that first year involved getting acclimated to the various administration and backend processes here and meeting regularly with the editorial board, in addition to preparing for the move to OA in 2023. Now that the current editorial team has a year's worth of issues under our belts, we felt it was a good opportunity to use this space to comment on our process, with a focus on my role as assistant editor.

It's first worth noting that this is a new role, as the previous iteration of the *LRTS* board had a single editor and a book review editor. The new team was brought on board with the book review editor role transitioning into that of assistant editor; this change was precipitated by the editorial workload, which was too large for a single editor. Additionally, this puts *LRTS* in alignment with our Core sister publications, *Information Technology and Libraries* and *Library Leadership & Management*, both of which also use an editor/assistant editor model.

In my capacity as assistant editor, I view my main role as to, you guessed it, assist! The editor takes the lead in assigning peer reviewers to papers, communicating revisions to authors, providing notifications of acceptance, and submitting final manuscripts to ALA Production Services for copyediting and layout. I serve backup as needed, and we consistently collaborate throughout the process. The editors closely consult on decisions of peer reviewer assignment, article acceptance, and determining the contents of each issue, down to the cover image. Importantly, we both give each article a final review, providing a last round of edits and proofing, and we both review the proofs from Production Services as well. It is definitely true that two heads (or pairs of eyes, as the case may be) are better than one. While the workload can be heavy, we feel the final product is made that much stronger having gone through multiple close readings by the editorial team.

I'm also happy that book reviews remain a part of *LRTS*, as they are an important service to the profession. I continue to carry on the roles and responsibilities of book review editor, selecting relevant titles for review, soliciting review copies from publishers, delegating assignments to reviewers, and editing the final reviews. This has been enlightening for me, as it allows me to stay abreast of new titles and be aware of publication trends within library technical services. Speaking from experience, writing a book review is a great avenue for early career library workers and beginning authors to get more involved in publishing. Indeed, there is a good deal of overlap at *LRTS* among book reviewers, article

authors, peer reviewers, and editorial board members. I encourage anyone interested in penning a book review for *LRTS* to fill out our volunteer form.

In this issue of *LRTS*:

- In "Unsettling the Library Catalog: A Case Study in Reducing the Presence of 'Indians of North America' and Similar Subject Headings," Karl Pettitt and Erin Elzi present a case study for amending subject headings to more appropriately represent Indigenous populations. The authors explain the genesis of the project in the context of institutional history, describe the challenges they encountered, and advocate for the importance of making changes at the local level.
- Robyn Gleasner's "Clear the Floor: One Library's Approach to the Removal and Integration of Items from Two Print Journal Collections" describes a complex project to offsite an entire floor's worth of print serials. Decision criteria for retention and weeding is discussed, and a methodology for integrating the removed titles with an existing offsite collection is presented.
- Book reviews

Unsettling the Library Catalog

A Case Study in Reducing the Presence of "Indians of North America" and Similar Subject Headings

Karl Pettitt and Erin Elzi

As the University of Denver (DU) has begun to accept and wrestle with its history, the DU Libraries have looked for ways it may be perpetuating the harms done to Indigenous populations. An example of this work can be seen in the libraries' work on changing the displayed terminology used in the Library of Congress Subject Headings (LCSH) to more current and appropriate headings that respect and correspond to the terminology used by the populations they are meant to represent. This article provides background for this work through a literature review and a more detailed account of how this topic is directly related to the institutional history of DU. A discussion of the specific steps and procedures taken to implement this change is followed by the obstacles encountered along the way and how they were overcome.

The University of Denver (DU) has an institutional history that dates back to the late nineteenth century and includes one of the most egregious atrocities committed by the United States against the Indigenous populations of this land, specifically the Cheyenne and Arapahoe nations. As the institution began to publicly accept and wrestle with its history in 2014, the DU Libraries looked for ways it may be perpetuating the harms done to Indigenous populations. An example of this work can be seen in the libraries' initiative in 2020 to change or update language used in catalog records to describe Indigenous peoples. Specifically, the project aims to change the displayed terminology used in the Library of Congress Subject Headings (LCSH) to more current and appropriate headings that respect and correspond to the terminology used by the populations they are meant to represent. This article provides background for the libraries' initiative through a literature review and a more detailed account of how this topic is directly related to the institutional history of DU. A discussion of the specific steps and procedures taken to implement this change is followed by the obstacles encountered along the way and how they were overcome.

Over the years, information professionals and scholars with various areas of expertise, not just catalogers and metadata specialists, have become aware of the shortcomings of controlled vocabularies, especially LCSH. While it is undeniable that there are certain benefits associated with using controlled vocabularies like LCSH, these shortcomings represent an opportunity for catalogers and metadata specialists to respond to user needs and expectations by altering or using different

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The following people at DU played a role in developing and executing the pilot project. This work could not have been done without them: Doug Rippey, Jil Dawicki, Jessi Jones, Hyo Jung Kim, Janette Ruiz, Lisa Villiere, Stevie Lee, and Kate Crowe.

controlled vocabularies when the situation calls for it. One such shortcoming in LCSH are the anachronistic terms used to describe Indigenous populations of North America. Some of these terms are rooted in eighteenth- and nineteenth-century colonialist practices and mentalities, representing language that is now understood to be both harmful and confusing.

The Library of Congress (LC) is not ignorant of the need for change in their controlled vocabulary. They recently announced plans to work on updating subject headings related to Indigenous peoples. According to a report presented to the American Library Association (ALA) Core Subject Analysis Committee during its annual meeting on June 8, 2022, a consolidated approach is being taken by gathering specialists from all over LC that will coordinate the work of updating LCSH authority records. The group tasked with this work includes subject specialists, collection curators, reference librarians, and archivists. Broader and more general headings will be the focus of the project at the beginning (Indians of North America and Eskimos will likely serve as examples). The composition of this group is intended to ensure that consensus throughout the library is reached on any agreed-upon changes.[1]

It is fair to ask why so much effort and time should be put forth by libraries to perform this work locally if LC is going to do something along the same lines in LCSH. Why not just wait for LC to finish its work and incorporate the changes into our catalogs? There are several reasons why libraries should continue this work despite LC committing to do so. First, LC themselves admit that this will take time to accomplish. Though it is true that the work will take a while to accomplish locally as well, there is a greater level of control over the speed and number of resources devoted to the task at the local level. Waiting on LC to make a specific change could mean putting the work of improving subject terms on hold for years, possibly decades. Second, there is no guarantee that LC will prioritize the same headings as the local institution. A significant reason for doing this work is to better represent our local users. The local institution is uniquely situated to respond to user needs and requests. Through conversations and tools like user research the local institution can implement changes that are representative of local users' desires. Finally, there is no guarantee that the terminology that LC chooses as a replacement for current LCSH will match what would be chosen by the local institution, or by the peoples represented by the terms. This has already occurred in the case of the LCSH "Illegal aliens" change. While some have been placated with the change, others, including the ALA/ALCTS/CaMMS Subject Analysis Committee (SAC) and the national campaign to "Drop the I-word," wish that LC had chosen something other than "Illegal immigration" as one of the replacements.[2] The Program for Cooperative Cataloging (PCC) has even advocated for libraries to be less reliant on a single vocabulary for this very reason. While recognizing the importance of controlled vocabularies, the PCC is encouraging "its members to explore avenues for reducing reliance on a single controlled vocabulary controlled by LC."[3]

For these and other reasons, unsettling and interrogating subject headings that describe people is important for libraries to undertake at a more local level. While complete reliance on a single controlled vocabulary is not ideal, a lack of resources often prohibits the development and maintenance of extensive local vocabularies. A careful balance should be sought that considers the needs of the local users with the ability of the library personnel to create and maintain these local headings. It is this model that informs the following discussion and the work that has been done at DU.

Literature Review

"Radical Cataloging." "Critical Cataloging." "Decolonizing the Catalog." "Indigenizing the Catalog." "Words matter." These concepts have been written about for decades. In one of the earliest critiques of LCSH that addresses historically minoritized and underrepresented groups, Sanford Berman calls out LCSH as only serving "jingoistic Europeans and North Americans, white-hued, at least nominally Christian (and preferably Protestant) in faith, comfortably situated in the middle- and higher-income brackets" and embedded with "'racist/colonialist bias,' double standards, and 'self-serving euphemisms.'"[4]

In the decades that followed, most research and writing on the representation of Indigenous peoples in the library catalog focused on classification schemes or developing thesauri, rather than seeking solutions for institutions that are essentially tethered to LCSH. These include the now well-known Brian Deer classification scheme. Brian Deer classification was developed by a Kahnawake librarian and is used at several Aboriginal libraries in British Columbia, including the X̲wi7x̲wa Library at the University of British Columbia.[5]

Most institutions that have developed their own subject thesauri either are outside of the United States or house highly specialized collections. These include the National Indian Law Library (United States), Aboriginal Thesaurus (Australia), Māori Subject Headings (New Zealand), First Nations House of Learning Thesaurus (British Columbia), Mashantucket Pequot Thesaurus (University of Washington), and the National Native American Thesaurus (University of California-Berkeley).[6] The diversity of knowledge structures and languages among tribal entities in the United States means that a thesaurus developed by or for a collection specific to another country or specific to a tribal entity in the United States cannot be applied to all.

Despite Berman's 1970s call to action for LCSH, many outdated and offensive terms still exist. In his ALISE Xchange presentation in 2015, John Burgess called out this inaction in

librarianship as "complicit, if not responsible, for perpetuating colonial approaches to knowledge by replacing traditional knowledge with Western knowledge, especially in physical libraries established under colonial regimes."[7]

The reasons for widespread use of LCSH include the ability for users to use the same terms when searching at various institutions, for resources to be easily incorporated into a union catalog or federated search, using cohesive terminology for multilingual and nonverbal works, and providing authority records that include alternative terms for the same concept.[8] However, in representing Indigenous peoples, LCSH is rife with "inappropriate terminology" and "glaring omissions" of "terms and concepts."[9] Another critique of LCSH and Indigenous representation derives from the idea of *literary warrant*. According to LC, literary warrant means that "headings are proposed as needed for new cataloging" and "headings are based on usage in resources being cataloged and reference sources."[10] In other words, concepts that do not yet exist—or are not yet acknowledged as existing—in the LC collections do not warrant a subject heading. However, Beghtol points out that *cultural warrant* is more at play. Cultural warrant "arises from the presumed information needs of the potential users of the system," establishes terms and categories based on "the personal and professional cultures of information seekers and information workers," and "means that a particular knowledge representation and organization system is more useful for some people than it is for others because each system is predicated on the assumptions made by a particular small or large discourse community, knowledge domain or culture." Thus, Indigenous representation in LCSH is not lacking due to literary warrant, or the lack of content on Indigenous topics and knowledge, but rather is lacking due to cultural warrant, or the exclusion of such topics and terms from the dominant discourse.[11]

Background

While making local changes that improve representation and decrease the presence of damaging language in the catalog or discovery layer is important across all institutions, it is especially urgent at DU due to the university's history and current campus climate. DU is a predominantly white institution (PWI) founded by John Evans in 1864. Evans served as the governor of the Territory of Colorado from 1862 to 1865, as well as the superintendent of Indian Affairs for the territory. On November 29, 1864, the Third Colorado Calvary under the command of Col. John Chivington, a founding member of the DU Board of Trustees, murdered and mutilated over 150 peaceful Cheyenne and Arapaho people encamped along the Sand Creek, mostly women, children, and elders. Because of the investigations that occurred following the Sand Creek Massacre, Evans was forced to resign his governorship in 1865. In 2014, a committee of faculty, students, and Sand Creek descendants produced the John Evans Report, which found Evans culpable for the Sand Creek Massacre.[12] Along with the report, the committee produced recommendations for confronting DU's history and promoting healing for Indigenous community members. As of 2022, some of the recommendations have been met, but most have not. In 2019, Righteous Anger, Healing Resistance (RAHR), a student-led group on campus, submitted several demands to the chancellor, some of which reiterated those of the John Evans Report. As of 2022, the RAHR demands have not been met. In 2022, following desecration of a recently constructed tipi on campus that belonged to the Native Student Alliance, a set of demands was released by a joint group consisting of Native Student Alliance members, Undergraduate Student Government members, Native and Indigenous faculty, and Indigenous community members.[13] Many of these demands echoed those from RAHR in 2019.

The recommendations and demands put forth in 2014, 2019, and 2022 call for specific, direct, and timely action from the administration at DU. In the meantime, various departments on campus, including the libraries, have sought ways they can support Indigenous students, faculty, staff, and community members. Seeking ways to improve representation in the libraries' tools and services is just one part of a multi-unit effort. Other actions taken by the libraries include increasing the presence of Indigenous voices in our collections by expanding the purchasing of works by Indigenous authors (not only for scholarly and nonfiction works, but also for graphic novels, poetry, and zines); establishing procedures for lending to any individual with a tribal ID, regardless of whether they have a DU affiliation; programming that includes Indigenous author talks; and a No More Pios exhibit in the library, which traces the history of the DU moniker—the Pioneers—and the widespread support on campus to change the moniker.

During the 2018–19 pilot project of adding more Indigenous voices to the collections, the libraries' Collection Diversification Task Force also wanted to look at ways to improve metadata for these items. After consulting with Indigenous faculty on campus, it was decided that the Design and Discovery unit and the Cataloging unit would look at the 581 Library of Congress Name Authority Records (LCNAF) for Bureau of Indian Affairs (BIA)–recognized tribal entities, doing online research to find how these entities currently name themselves. This resulted in the local creation and updating of 118 name authority records to add name variants that did not exist in the LCNAF record. This local name authority work led the libraries to start considering what other access points could be improved upon for these materials, which ultimately resulted in looking at LCSH.

In sharing the following process that the DU Libraries used for reducing the presence of "Indians of . . ." subject headings in our discovery layer, the authors hope others will

find ways to start similar work at their libraries. There still is much work to be done by both the libraries and the university, and the authors welcome any feedback on our procedures and efforts.

Why "Indigenous Peoples"?

In their work on creating space for Indigenous ontologies, Duarte and Belarde-Lewis put forth "the question for us now, as researchers and practitioners in the field of knowledge organization is not, how do we fit more vanishing 'Indians of North America' into the boxes we made for them, but rather, how do we create new spaces for Indigenous ontologies to emerge?"[14] The application of a single, broad term to cover the diverse groups and peoples that the land currently known as the United States belongs to is a colonizing tool that fails to acknowledge differences in language, culture, and ways of knowing. "American Indian" and "Native American" became the widely accepted terms starting in the 1960s, but these terms have been looked at as outdated and colonizing for decades. In his writing from 1999, Michael Yellow Bird avoids "using 'Indian,' 'American Indian,' and 'Native American' because they are 'colonized identities' imposed by Europeans and European Americans" and instead uses the terms Indigenous Peoples and First Nations Peoples.[15]

In fall 2020, with Institutional Review Board (IRB) approval, the design and discovery librarian surveyed and interviewed librarians and staff at tribal libraries across the United States. When asked what term participants would rather see used in lieu of "Indians of North America," most responses replaced the term "Indians" with "Indigenous"; some responses indicated no preference between "Native American" or "Indigenous"; one respondent indicated they accepted "Indians of North America" as is and saw no need to change it. Some participants opted for follow-up interviews. All interview participants stressed that there is no proper term to encompass all tribal entities and members in the current United States, and ideally all individual entities covered in a work would be listed in the subject headings instead of a broad term to replace "Indians of North America." They also expressed the understanding that historical works might not refer to specific entities by name, making it difficult to move away from an incorrect broad term. They support a replacement for "Indians of North America" as a more immediate action but asked that over time even the replacement be phased out in favor of recognizing specific tribal entities.

Description of Research Methods

This project used a multifaceted approach to gathering data and existing research to inform the terms used. Project members looked at existing projects at various institutions. These institutions ranged from those specializing in materials and archives by and about Indigenous groups to medium- and large-size predominantly white academic institutions (similar to DU). These projects helped inform the process and provide ideas for terminology.

Simultaneously, as part of the previously mentioned IRB-approved research, the design and discovery librarian sent a survey to fifty-two tribal libraries in the United States. The survey was sent via United States Postal Service and via email, and the participating libraries had the option to complete the survey in the format they preferred. The survey included open-ended questions about cataloging, metadata, overall barriers the library might have in cataloging, and questions specific to the LCSH term "Indians of North America" and to the LCNAF term for their tribe or nation. Participants were asked if they thought there would be better terms to use instead of the LCSH or LCNAF term.

Survey results were coded, and participants were provided the option of a follow-up interview. Interviews lasted an average of twenty minutes and were conducted via Zoom or phone call. They gave participants the opportunity to elaborate on the answers provided in the survey.

Discussion

When considering the effect of words and representation, it is vital to incorporate the perspectives of the historically overlooked and underrepresented. While engaging Indigenous community members in the process was considered nonnegotiable from the earliest stages of this project, the potential difficulties in doing so were readily acknowledged. Such collaborations potentially target individuals for their time and emotional labor. At institutions of higher education, it has been shown that BIPOC faculty already are often asked to take on extra work and emotional labor on account of their identities—a problem known as "cultural taxation."[16] While we have engaged with Indigenous community members and library workers throughout various stages of the process, we also tried to limit the burden or stress that would be placed on them in the process—both with respect to emotions and time.

From the initial stages through the completion of the pilot, the execution of the project has not been without hurdles and barriers. An unexpected hurdle in the project was in gaining stakeholder support in the DU Libraries. The libraries' Metadata and Discovery Committee (MAD) consists of representatives from all units in the libraries who work in the library services platform (LSP), discovery layer, or other online search tools such as finding aids and the institutional repository. In May 2020, following the aforementioned project to add terms to the locally managed LCNAF BIA records and influenced by the work being done at the Archives of

Manitoba, the design and discovery librarian shared the nascent idea of exploring internal replacements for "Indians of North America" and related subject headings. Although the initial proposal was not approved, further conversations with select MAD members revealed that they did in fact support the idea of the project, while acknowledging that many details for the project still had to be figured out. These conversations were very beneficial to the project, leading to the formation of a group of three librarians/faculty members and one staff member (design and discovery librarian, coordinator of cataloging, curator of special collections and archives, and metadata technician IV) who committed to drafting an official proposal for the project and working to gain consensus among MAD.

The group spent one full year compiling information and drafting a robust proposal for a pilot version of the project. The work of other institutions was looked at, including institutions in Canada and Australia, as well as those in the United States who were doing some version of the work. The work of Library and Archives Canada (LAC) heavily inspired and influenced the group. LAC began reviewing Canadian Subject Headings (CSH) in 2019, having found that the language of CSH often does not reflect the terminology preferred by First Nation, Inuit, and Métis Nation communities in Canada. Their process has involved consulting with multiple stakeholder groups, including the Canadian Federation of Library Associations (CFLA) and their Indigenous Matters Committee (IMC), the LAC Indigenous Advisory Circle, the CFLA-IMC Red Team on Naming and Classification, LAC Indigenous colleagues, and the broader library community. The list of terms they have reviewed and updated is available on the LAC website, which included changing "Indians of North America" to "First Nations" and allowing for geographical subdivisions.[17]

In looking at work being done in the United States, the group met with individuals from the Iowa State University Library, who were doing similar work.[18] In addition to the surveying of tribal libraries, the design and discovery librarian also consulted with the Native American liaison and program manager at DU, who in turn sought feedback from other Indigenous individuals on campus. In the meantime, the metadata technician, coordinator of cataloging, and others in the Cataloging unit reviewed subject headings in use in DU's instances of Alma and ArchivesSpace. They compiled a robust list of all LCSH headings that included "Indians," making notes about which headings should absolutely be considered for replacement (e.g., "Indians of North America"; "Names, Indian"), which ones needed further investigation because they are a government-used term (e.g., "Indian Courts"; "Indian Reservations"), and which headings would not qualify for replacement because they are formal titles or refer to peoples of India or the West Indies (e.g., "Authors, West Indian"; "Butler's Indian Campaign, 1778").

With the collected research and data, the group explored options for replacement terms. For the pilot version of the project, the group would limit the changes to five LCSH terms: "Indians of North America," "Indians of South America," "Indians of Mexico," "Indians of Central America," and "Indians of the West Indies." Based on the work of other institutions and feedback from individuals at DU and various tribal librarians, "Indigenous peoples" would be used to replace the term "Indians" in these five headings. The group considered various possibilities for the geographic entity names in the headings and decided to keep the existing geographic terms used in the subject headings (North America, South America, Mexico, etc.) because for these areas, multiple Indigenous groups and languages exist and therefore a single Indigenous-language term cannot be used to replace a term such as "North America."

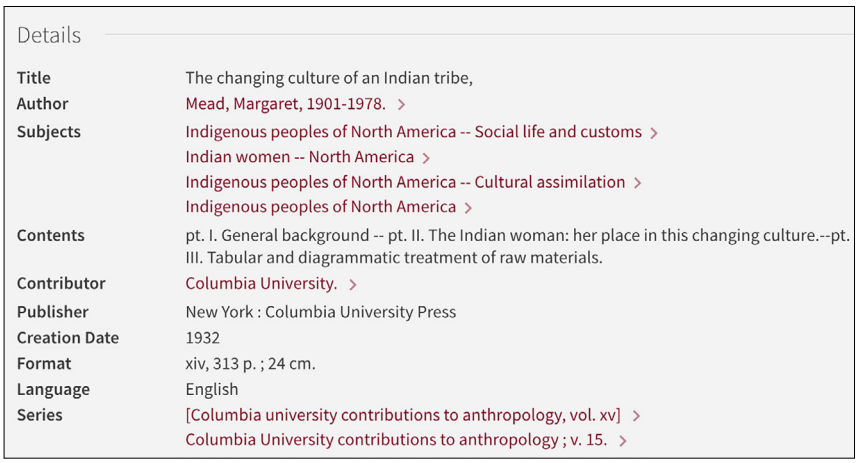
The pilot project proposed changing the authorized headings for these five terms to "Indigenous peoples of North America," "Indigenous peoples of South America," "Indigenous peoples of Mexico," "Indigenous peoples of Central America," and "Indigenous peoples of the West Indies." At the time of writing, the total number of bibliographic records changed in the LSP and discovery layer using these headings was 660. The authorized LCSH terms would be maintained in the authority record as alternative terms, making them indexed and searchable in the discovery layer, but the replacement heading is what would display in the record—both in the LSP and discovery layer.

Knowing the problematic nature of using a broad term to describe the multitude of Indigenous groups of the land currently called the United States, it was also decided that these terms would be very limited in their use. Catalogers have been trained to not use these terms going forward unless absolutely necessary, but to instead identify the tribal entities that apply and use those LSCH or LCNAF terms instead. A second phase of the project will include retrospective subject analysis of the materials that the library already owns that use these terms, and when possible, replace the broad terms with the LSCH or LCNAF for more specific Indigenous groups.

When the new, detailed pilot proposal was brought to MAD in June 2021, it was met with much more acceptance than it had been in 2020. However, the DU Westminster Law Library, which uses the same instance of the LSP, did not approve of the pilot as proposed. The Law Library expressed concerns that their users would be confused and misled if they were to search for the LCSH authorized headings and instead find the locally preferred heading listed in the record. There was also concern that the term "Indigenous" has a specific meaning in international law and might confuse researchers. The project group arranged to meet with multiple representatives from the Law Library to hear their concerns and seek a solution. It was decided that the LCSH authorized headings would be moved to a locally defined field in the MARC

record. Since the Law Library has their own view in Primo VE, the discovery layer used by the DU Libraries, it was then possible to display this locally defined field for the Law Library only, ensuring that the Main Library could continue with their goal of reducing the presence of these five LCSH terms in their view of Primo VE.

To begin updating the authority records, it was necessary to understand how authority work is handled in the LSP. In Ex Libris' LSP product called Alma, local authority records take precedence over the Community Zone (CZ)–managed authority records that serve as the de facto authority file for Alma. The CZ is a cloud-based centralized system that connects all Alma libraries. It is made up of a Central Knowledge Base, authority vocabularies, and a networked bibliographic catalog of electronic resources found in the Central Knowledge Base. The CZ authority vocabularies are updated by Ex Libris automatically and require very little to no intervention by the institution for authority maintenance. Bibliographic fields with controlled vocabularies are automatically linked to the corresponding authority record in the CZ. The local authority option allows an institution to supersede the CZ managed authority records and modify or replace the references or authorized headings to affect users' search outcomes or the terms displayed in the online catalog. There are certain limitations to using this process, such as the fact that the new authority records cannot be used in the browse subject headings search. Despite this limitation, it was determined that for this project, the benefits outweighed the negatives.


Details

Title	The changing culture of an Indian tribe,
Author	Mead, Margaret, 1901-1978. ›
Subjects	Indigenous peoples of North America -- Social life and customs › Indian women -- North America › Indigenous peoples of North America -- Cultural assimilation › Indigenous peoples of North America ›
Contents	pt. I. General background -- pt. II. The Indian woman: her place in this changing culture.--pt. III. Tabular and diagrammatic treatment of raw materials.
Contributor	Columbia University. ›
Publisher	New York : Columbia University Press
Creation Date	1932
Format	xiv, 313 p. ; 24 cm.
Language	English
Series	[Columbia university contributions to anthropology, vol. xv] › Columbia University contributions to anthropology ; v. 15. ›

Figure 1. Example record from the discovery layer. The term from the pilot project has been changed to "Indigenous peoples of North America" both with and without subdivisions. This record also includes a subject string that will be looked at in the future phases of the project: Indian Women—North America.

Alma Methodology

Because bibliographic fields are linked to the CZ authority record, changes made to an LCSH record in the CZ are automatically reflected in the LSP and discovery layer. To relink the authority fields in bibliographic records to the local authority records, two jobs in Alma must be enabled to allow for both the re-association of the authority fields in records to the local authority records and for the preferred term to be corrected if a new preferred term is specified in the local authority records. These jobs run on a set schedule and do not require manual intervention. However, for these jobs to perform properly, an additional step was necessary to ensure the job that re-associates authority fields from the CZ to the local authority record performs its function as intended. Utilizing batch processing rules, also called normalization rules, rules were written so that anytime they found the specified LCSH they would change the second indicator from 0 to 7 and add a subfield 2 with the code for the local authority configuration previously set up. This made it possible for the two automated jobs in Alma to relink the authorized headings and change the authorized headings if needed. In addition, a set of rules were created to accommodate the Law Library's request to retain the authorized LCSH terms in their view of Primo VE through the use of a local bibliographic field.

LCSH authority records found in OCLC Connexion were chosen as the templates for the local authority file records. These authority records were chosen to maintain consistency and use the metadata already present in the record. The process outlined in the Library of Congress Subject Headings Manual (LC SHM) H 193 was used, moving the current preferred term to a new 450 field and then adding our local preferred term to the 150 field.[19]

This has the advantage of providing indexed searching of both the old and new authorized headings while only displaying the new authorized heading to our users in the online catalog.

The changes being made to current records in Alma also had to be made to all records moving forward that would be brought into Alma. Normalization rules were once again used to change the second indicator to 7 and add a subfield 2 with the appropriate code for the local authority configuration. These rules must be created for each instance of LCSH that would be changed, meaning in this case, the five different LCSH terms. The rules were added to every import profile that is used to bring records into Alma from an outside source, including OCLC Connexion. With these in place any record brought into Alma will automatically be re-associated with the local authority record, and the heading in the record will be changed with the new preferred term if one of the five previously mentioned LCSH terms are found.

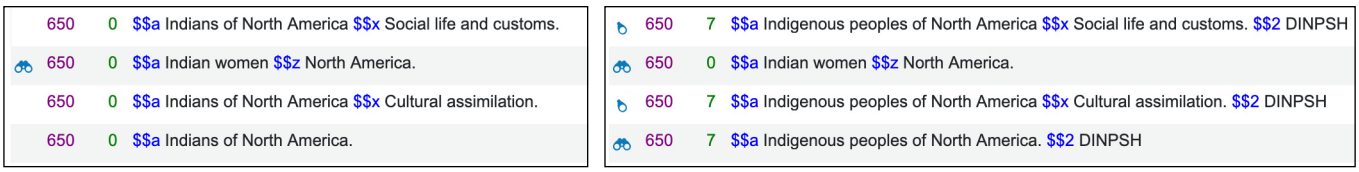


Figure 2. Image on the left shows the subject headings prior to any changes. Image on the right shows the changes made to the subject headings using the batch processing rules.

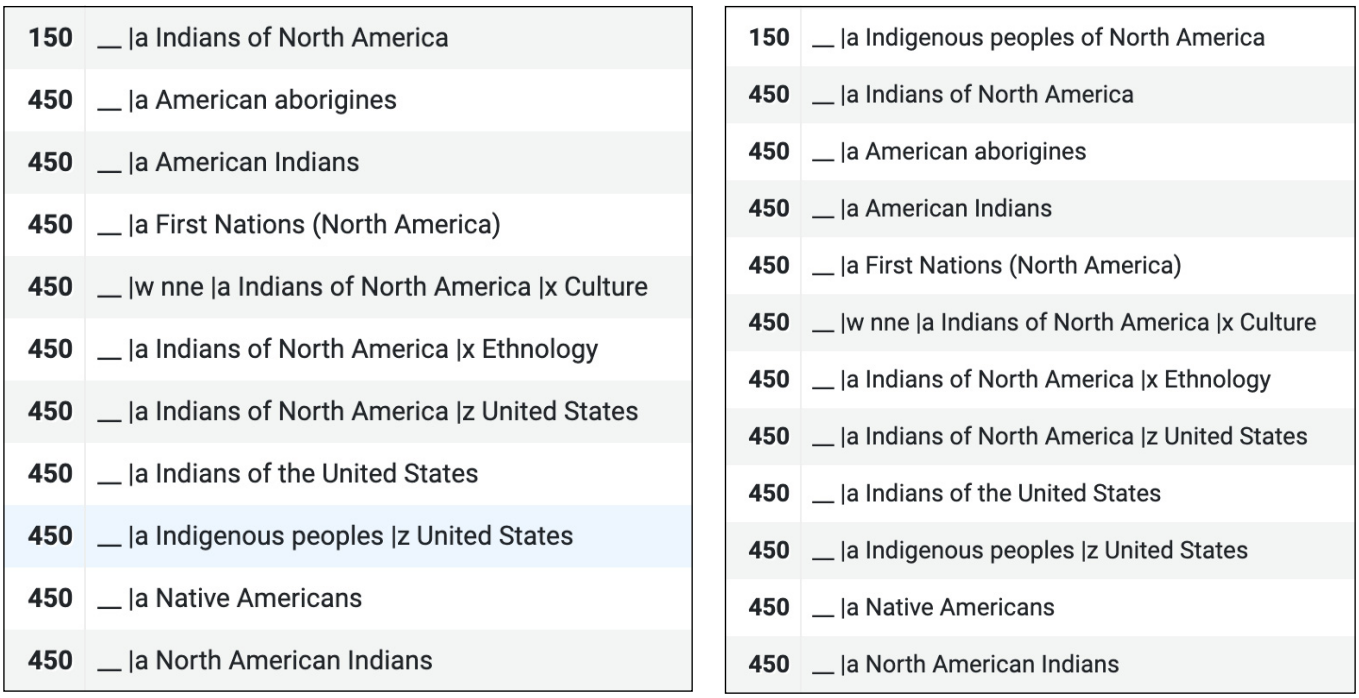


Figure 3. Image on the left shows the standard LCSH record. Image on the right shows the changes made to the record for the local authority record.

Limitations of Subject Headings: LCSH and Primo VE

The limitations of subject headings in LCSH and Ex Libris' Primo VE affect the decisions made in this process and affect the user experience for researchers. The hierarchical structure of LCSH lends itself to the existence and application of overly broad (and, as such, incorrect) terms, such as "Indians of North America." The ability to geographically narrow down the term with subfields has long made it possible for catalogers to avoid using the names of tribal entities and people. For example, one could use "Indians of North America—Colorado" instead of using the LCSH or LCNAF terms for the various tribal entities for which the land of Colorado belongs to, including Arapaho, Cheyenne, Ute, Shoshone, Apache, and Pueblo. The project team considered changing the examples such as the one above to "Indigenous peoples of Colorado," but the hierarchical and nested nature of LCSH did not make this a feasible option. It was important that researchers could continue to search and retrieve using the authorized heading, and since subject strings do not have authority records, we would have had to create all new local authority records with our preferred term, adding the entire replaced subject string in the authority as a "see also" reference. Creating such a large and robust set of local authorities may be considered in the future but was deemed out of scope for the size of this team and project.

In Primo VE, locally managed authorities are not indexed in a browse search, even if we are using locally managed versions of LCSH records. This means that the five pilot terms and any terms added to the project in future stages are not included in the alphabetical browse list of subject terms. How much this affects an institutions' researchers will vary per institution. At DU, the browse search is used, but not so heavily that it was considered a hinderance to the project. However, that might not be the case for other institutions.

While it is possible in Primo VE to hyperlink locally managed fields, it was decided that the extra steps needed to do so would add unnecessary work to this project. This means that the locally managed field that is used for the Law Library to display the LCSH authorized term does not act as a clickable link that leads to a list of results with that term indexed as a subject-heading, such as is the case for 6XX and a handful of other fields. Since the intent behind adding this field to the Law Library view was for display purposes only, the lack of a clickable link was not deemed a problem in this case.

The most significant limitation to doing this work locally and in a discovery layer, such as Primo VE, is that most discovery layers include records that are not locally managed. The locally managed authorities in Alma only affect the institution's own records in Alma—they do not affect records pulled from Ex Libris' Central Discovery Index (CDI)—which is how DU incorporates most of its e-resource records. This means it is not possible to completely *replace* the "Indians of" subject headings, as the LCSH terms will still exist in the CZ and CDI records, but the presence of the unwanted terms can only be *reduced*.

Conclusion

The rate at which LC updates authoritative terms to best reflect current cultural expectations is at best painfully slow, which can perpetuate offences and reinforce colonialism. Despite having been called out on this by scholars and librarians for more than fifty years, the pace of addressing subject headings that serve to represent historically underrepresented groups continues to be glacial, and unexpectedly and inexplicitly controversial or political at times. For these reasons, an increasing number of institutions have sought to make changes locally rather than wait for LC.

The language that libraries choose to use to describe resources can have a positive or negative affect on users. Words can aid users in finding materials that will help their research, or they can cause harm and perpetuate longstanding injustices in our society. While DU had specific circumstances that led to the creation of this project and the sustained effort to implement these changes, every institution of higher education in the United States has benefited from and/or contributed to the oppression of Indigenous people and cultures. Projects such as this do not constitute a major contribution to reconciliation regarding the offenses of the past and present. However, they do represent a small but important step in recognizing the harm of our long-held practices and the need to make changes on our own when the systems we commonly use are not able to pivot so quickly.

The DU Library set forth to examine the LCSH "Indians of North America" and related terms for possible replacement. The result was a pilot project that took two years to execute. The project is iterative and will continue to expand with more terms. The June 2022 announcement from LC that they will be examining these same terms, starting in fall 2022, may also lead to changes that will affect the work DU has done locally. However, based on the timeline of previous subject heading changes at LC, DU still believes doing this work at the local level is worthwhile. The problems that come with using a broad term to describe hundreds of groups of diverse Indigenous peoples is also making it important for institutions to work with their constituents to determine what terms are best for their desired representation, and research needs.

It is of the utmost importance to make the work of reviewing and changing LC terms for cultural relevance and representation an iterative process. Furthermore, in going through this project at DU, the project group learned the importance of seeking consensus and prioritization of Indigenous perspectives over unanimity. This mindset will continue to be employed as the DU Library moves into the next phases of the project. In sharing their process, those involved in this project hope that other institutions find this informative and take steps to initiate similar work, for these or any number of other problematic subject headings.

Note about Terminology

The authors are intentional in their use of the term "unsettling," rather than "decolonizing." Several scholars have explained that using "decolonizing" and similar terms outside of the context of actual decolonization is harmful and can impede actual decolonization, which is still being sought in the United States and other stolen lands around the world.[20] While representation and language in the library catalog is important, the authors respect those who believe such work does not move us closer to actual decolonization. It is necessary to acknowledge, however, that there are scholars and librarians doing important work in this sphere who have in the past or continue to use the word decolonization in this context. Therefore, the term "decolonization" is only used when quoting or paraphrasing another work that uses the term.

The authors also recognize the problematic nature of using the term United States and acknowledge that the land commonly and politically known as such is made up of stolen lands of various tribal entities.

When using the term "Indigenous peoples," the authors are referring to members, historical and present-day, of the hundreds of tribal entities whose ancestral lands make up the United States.

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Notes on Operations
Clear the Floor

One Library's Approach to the Removal and Integration of Items from Two Print Journal Collections

Robyn M. Gleasner

Due to the desire for more student space at the University of New Mexico Health Sciences Center, the Health Sciences Library and Informatics Center reviewed its serial holdings both in the library and in its offsite storage facility and determined which titles to retain and discard. This paper will briefly describe the selection process and then discuss the methods and phases of the project used to discard material in two shelving locations including auctioning material, donating material to another library, removing unselected material, and repurposing material for a decorative noise-abatement wall. This paper will also discuss the process of integrating items selected for retention from two shelving locations in separate buildings into one shelving location. The author will share the lessons learned throughout the project.

The University of New Mexico (UNM) Health Sciences Center (HSC) determined a need for more student space and identified an opportunity for the Health Sciences Library and Informatics Center (HSLIC) to fill this need by creating a learning commons to support the community. In the summer of 2018, the library began an eighteen-month project to remodel the third floor of its three-floor library building to create this space. As the library's unit responsible for collection development and technical services, the Resources Archives and Discovery (RAD) unit was tasked with developing a plan to remove all the print journals from the third floor of the library. The print analysis project to determine which titles to retain and discard ran from February to August 2018, and the removal and integration project ran from March to July 2019.

While the library had an offsite storage facility in the basement of an adjacent building, there was not sufficient space to house all the volumes from the third floor on the limited compact shelving space. The offsite storage facility already housed around 42,000 volumes that were published 1979 and earlier with no room for growth, meaning there was no room to accommodate the nearly 60,000 volumes from the third floor, which were published after 1980. This meant roughly 42,000 volumes from both shelving locations could be retained. After titles were selected to retain, a spreadsheet was created that included the OCLC number, title, decision, number of volumes offsite, and number of volumes on the third floor. This provided the total number of volumes being donated, discarded, and retained. It also provided the total number of volumes being retained in each shelving location.

Literature Review

Unfortunately, during the planning of the removal project there was little in the literature found on collection shifts simultaneously completed along with the

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relocation and disposal of material from multiple locations. This is surprising considering that in a 2007 published survey of Association of Research Libraries members, 84 percent of respondents said they conducted at least one move between 1994 and 2004.[1] While this survey focused on temporary moves, this information is relevant as it shows the frequency of library moving projects and the lack of reporting them in the professional literature.

In the preparation stages of the project, Wells and Young's *Moving and Reorganizing a Library* was consulted for guidance as it had been useful for developing plans for previous smaller shifts. Although written in 1997, the book still provides relevant information and formulas for calculating and determining shelf space as well as general information about planning a move.[2]

Fortriede's *Moving your Library: Getting the Collection from Here to There* provided similar information but also included formulas for staffing, recommendations if hiring a moving company, an interfiling method and description of a staging area, as well as an intricate way of measuring space using string.[3] The string method proved too complicated for this removal process but the book as a whole was instrumental in creating a plan.

Articles about libraries with similar projects were also reviewed. Sharpe describes a relocation project in which the M. D. Anderson Library at the University of Houston was tasked with removing the bound journals that were interfiled with their book collection to a newly installed storage system in the basement of the library. The article discusses making room and cleaning the new space for the bound journals as well as the importance of defining items being moved and their method of using stickers to designate items selected to move.[4]

The Albert S. Cook Library had the opposite goal in mind when faced with the merger of two libraries. They were tasked with interfiling their periodical collection with their monograph collection. Most important was determining whether there was sufficient space in the stacks to hold both collections. "With the major goal of collection integration in mind, any items no longer essential to the collection were removed. Technical services staff consulted with reference staff about weeding specific subject areas as well as archives staff about relocating titles due to age condition, or value."[5] Weeding provided an opportunity to keep the consolidated collection relevant and current as well as saving staff time in relabeling and reclassifying unneeded material.

The University of Cincinnati Medical Center Libraries developed a procedure when roughly 300–400 new journal titles were added to their collection. They considered two methods of space measurement: linear feet occupied/unoccupied and number of shelves occupied/unoccupied. "The number of shelves occupied/unoccupied method is less exact, but requires less staff time," and so they chose this method. Then they calculated the future growth expected for each title. With these calculations, they marked on the shelf where each title should begin. Students worked in teams of two to put the journals in the correct place on the shelves using three book trucks: two students removed journals from the truck and placed them on assigned shelves while the delivering student picked up the truck they had previously emptied and returned it to the student loading trucks.[6]

On the other hand, The Louis Stokes Health Sciences Library chose to measure in linear feet to determine if their selected journals would fit in offsite storage. Their loading crew for moving the journals consisted of one "sending supervisor, one loading supervisor, and seven helpers." The unloading crew in the new location consisted of "one receiving supervisor, one unloading supervisor, and seven helpers." They also offered advice as far as selecting staff persons to be responsible for the move, preparing a checklist for each day, and being willing to work long hours.[7]

Most of the literature stresses the importance of making a plan before starting any library moving project. Dimenstein advises "when faced with a library move, plan the components of the project ahead of time, step by logical step. Make a project plan. . . . Think of all the tasks that have to be accomplished, put them in order, and assign target dates for the start and completion of each."[8] One of the most important parts of shift planning and implementation is to remember that mistakes happen and when they do, it's time to step back from the project and take time to figure out how to solve the problems before moving forward.[9] Choosing the appropriate time to move a collection is also very important. The library wants the move to be as smooth as possible and maintain a minimum amount of disruption to services.[10]

Logistical problems were a constant theme in the case studies reviewed. Kurth and Grim's *Moving a Library* describes the transfer of around 8 million volumes from an old building to a new library and how the volumes to be moved were shelved among more than a million other volumes already shelved in the new library. To deal with this, along with other complexities, they created phases for the project that accompanied a timeline.[11]

The literature consulted discussed the people and roles necessary for conducting a move, the importance of creating a plan that included measurements of the material, available space, and the necessity for allocating space for any anticipated growth. As the HSLIC no longer collected print serials, growth calculations were unnecessary; however, the formulas suggested were helpful to determine if material retained would fit in the available space. The literature also offered advice on the best time to implement a move and how to keep movers and staff safe and morale up.

This paper will describe the HSLIC's project plan for clearing the third floor. It will briefly discuss the criteria developed for the bound journals to retain and discard but

focus in more depth on how to implement those decisions. This study outlines how to remove the journals in offsite storage to make room for the journals being retained, how to integrate the journals being retained from the third floor with the journals retained in offsite storage, and how to remove remaining journals and shelving from the third floor, as well as share lessons learned along the way.

Overview of Review Selection Process

The RAD unit, comprising the resource management librarian, scholarly communications librarian, and the cataloger, began by evaluating a subset of the journal collection, titles with ten or more total uses (composed of checkouts, soft use from the previous cataloging system, and soft use from the current cataloging system). Soft use, also known as a non-loan return, is how the interlibrary loan (ILL) staff check in items they have scanned for ILL or document delivery purposes. After the initial review of this subset of titles, the team determined that there was enough room in offsite storage to expand the criteria to include five or more total uses to retain more material.

Criteria used for evaluating journals for retention or discard at other institutions included usage, online access, print/online overlap, perpetual access to archival content, rarity, image quality, and specific importance of the journal to the library community.[12] Another approach was to create a set of rules for withdrawing titles and a set of rules for retaining titles. Rules for withdrawing included titles represented in online archival packages, short or incomplete runs, and titles no longer relevant to the curricula. Rules for retaining titles in storage included whether online access was available (from any provider), whether the title had significant subject area status and/or there was continuing value for local collections, or if online versions were poorly scanned.[13]

These case studies aided the resource management librarian in developing and expanding criteria. See the appendix.

One complication that occurred during the review process involved supplements. Some supplements were cataloged on a separate record, and the journal title on the spreadsheet did not contain the word "supplement or "supplementum," even though it appeared on the public facing side of OCLC's WorldCat Discovery. It was decided that if the main title was marked to discard, the supplement should be discarded as well. Supplemental volumes were not evaluated separately from the overall serial title even if they were listed under a separate record.

Using the new criteria, the RAD team evaluated all 2,628 print journal titles. In the middle of the evaluation process, the scholarly communication librarian left the university and the electronic resources and serials librarian joined the team. Each of the three team members reviewed 300–400 titles. The entire review process took from February 2018 through April 2019.

Decisions

The team made decisions about what to retain and discard by considering all the criteria. Recent use as measured by the current cataloging system's soft use was the strongest factor that led to a decision to retain a title. If the library had access to the full electronic back run of a title, either perpetual access or through open access, the title was marked as a discard. Titles with little or no recent use were marked for discard provided they were available from the collaborative print storage facility. The team also looked at recent ILL lending requests and decided to retain titles that were lent frequently so that adverse effects on lending were minimized. Titles that were on the Abridged Index Medicus (AIM) list and not available electronically were also kept since these were considered core titles in each medical specialty.

RAD was the library's unit responsible for collection development during this project. While the library had reference librarians, those librarians were not responsible for selection and were not consulted regarding the decisions made. If more time had been allotted to make these decisions, this may have been communicated differently with both users and other library employees.

As a result, the team made the following decisions listed in table 1.

Table 1. Number of volumes and titles selected to retain, discard, and donate

Decision	Volumes	Titles
Retain	37,000	583
Discard	64,000	2,045
Donate	3,000	407 (not complete run)

Phases for the Move

Even more daunting than reviewing the titles was the task of implementing the decisions: how would the team move the material that was selected to retain from the third floor to offsite storage, and how would the material not selected be removed?

By combining information, methods, and advice from all the resources reviewed, RAD created a method that included five phases and subsequent steps. First, titles selected for discard had to be removed from offsite storage to make room for titles selected to retain from the third floor. The first three phases focused on the removal of those items.

- Phase 1: auctioning material from offsite storage
- Phase 2: donating material to fill gaps in other libraries' collections
- Phase 3: discarding material in offsite storage

The next two phases dealt with the complicated task of integrating the titles selected to retain on the third floor with the items already in offsite storage and then discarding or repurposing the remaining material on the third floor.

- Phase 4: integrating items retained on third floor with items retained in offsite storage
- Phase 5: discarding or repurposing material on the third floor

Phase 1: Auctioning Material from Offsite Storage

Members of the library's administration and RAD units worked with university's Purchasing and Shipping and Receiving offices to follow the university's property management and control policy regarding the disposition of university assets.[14] It was recommended that the library attempt to auction the material that was not chosen for retention. Because of the age and subject areas of these journals, it was doubtful anyone would want to purchase them for the content; however, there was a chance that someone would want them for the paper to reuse or recycle for their own projects.

Rather than put everything chosen for discard on auction, the team tested ten titles (about one hundred volumes) that had been marked for discard in the offsite storage location. These titles were selected because they were short runs only shelved in offsite storage and would not fill any gaps for potential donations, which will be discussed in the next section. This was an opportunity to test a process for removing material from the storage location. Individual shelves with the selected volumes were marked with electrical tape as well as the end of the range to indicate something needed to be pulled from that location. The Shipping and Receiving team pulled the items, packaged them, and then took them to their warehouse for viewing during the auction. The items were available to bid on for about a week.

No bids were received.

Phase 2: Donating Material to Fill Gaps in Other Library's Collections

At the time of the project, the university did not have a collaborative storage facility available; however, the library had a consortial ILL agreement with an organization that did have such a facility. This facility was contacted to see which volumes marked for discard would fill gaps in their collection. A detailed spreadsheet of the discards was sent to them including title and specific volumes; they marked what they wanted and listed specific volumes to send to them. The items were then physically pulled from the shelf. Because they only wanted specific volumes rather than an entire run, the team pulling the material had to be extremely careful what was pulled. Around 3,000 volumes were shipped to the facility.

The library also investigated other donation programs. The library had worked with the African Library Project (ALP) in 2017 to donate books to Malawi. It cost around $1,400 to ship material to their facility in New Orleans and ALP covered the cost to ship to Malawi.[15] Based on this information, the team decided it was not worth the investment to ship outdated material overseas.

Process

Excel spreadsheets were created for each shelving location (third floor, offsite storage, and titles that were in both locations) to make pulling the items easier and more efficient. The spreadsheets each listed the OCLC number, title or description, shelved-with information, volumes requested by storage facility, total number of volumes, number of volumes offsite, number of volumes on third floor, a column to initial who pulled the volumes, and any notes worth mentioning. We had three teams work on pulling the items on each spreadsheet. Teams consisted of members from both Public Services and RAD units. The resource management librarian left the university and the cataloger managed the remainder of the project with the assistance of the electronic resources and serials librarian.

The titles on the spreadsheet matched the shelf order as closely as possible; however, some titles had a "shelved with" note in the catalog. This meant that the titles were shelved with a different title rather than alphabetically. For example, *Biennial Scientific Report* was shelved under *Annual Scientific Report of the Howard Hughes Medical Institute*. This was marked in the spreadsheet when possible, but when it was not noticed, the catalog had to be searched, which added more time to the process. This was also the case in subsequent phases.

All items that were pulled were put on a library cart and then processed to remove all library property stamps. They were then moved to another room and placed on library moving carts that were rented from a moving company for storage. This entire process took about a month. The moving company was then hired to box and transport the items to the receiving library.

Phase 3: Discarding Material in Offsite Storage

There were 1,114 titles or about 26,775 volumes chosen to discard in offsite storage. The spreadsheet listing offsite storage materials marked for retention was split in half between the two teams from the Public Services and RAD units. The titles were in alphabetical order and matched the shelf order as closely as possible. Also listed on the spreadsheets used for marking the journals were the number of volumes that had been donated to make it easier to count the volumes for discard.

Volumes were marked with an "X" on the lower quarter of the spine; the first volume in the run was pulled and placed so that the spine was down on the shelf and the pages were face up. A green flag was placed in the lower quarter, so that a good portion of it stuck out from the shelf. The green flag signified the start of a run, and one could easily see it if looking down the range from the aisle. The last volume in the run was treated in the same way, but with a pink flag to show the end of the run.

If the run was particularly small (i.e., one to three volumes) and located between titles that were being kept, they were relocated at the end of a larger run marked for discard. This made the material for discard easier to see.

When the marking was complete for a title, the range number was noted on the spreadsheet to assist those supervising the moving company physically discarding the items. The titles were also listed at the end of each range for reference. Marking these items took a little over a week.

This method created a stop-and-go method for the moving company, with a green flag at the beginning of the run and a pink flag at the end of the run. They set up an assembly line of two people pulling items and loading the carts and three people moving the carts and dumping items in the dumpsters placed outside. This took about four days to complete.

Phase 4: Integrating Items Retained on Third Floor of Library with Items Retained in Offsite Storage

There were 456 titles consisting of 21,893 volumes selected for retention shelved on the third floor. The approach to marking these items for discard was similar to the above method. This time the spreadsheet of items on the third floor was divided into three, so that each team had around 152 titles to mark. Items were marked with an "O" to signify that the item was moving to offsite storage and then followed the same method of flagging.

Because these items were being kept, it was extremely important that the titles remained in alphabetical and chronological order as it would affect integrating these titles with the items currently shelved offsite.

Step 1: Preparation Work

To make sure that no items that should have been discarded from offsite storage remained on the shelves, one last check was completed. Items found were pulled onto a cart and taken back to the library for recycling.

The same moving company used to ship the donated materials was hired to help integrate the collections being retained. Five moving company employees and two supervising librarians were divided into two teams. Team 1 included one librarian and two moving company employees working in offsite storage. This allowed sufficient space for teams working in the compact shelving while also ensuring the order and accuracy of the work. Team 2 included one librarian and one moving company employee working on the third floor of the library.

Step 2: Clearing shelves in Offsite Storage to Make Room for New Material

There were around 15,200 volumes selected to retain and integrate with the third-floor volumes. To prepare for integrating or interfiling the collections, Team 1 was instructed to remove all items from the first seven ranges in offsite storage and placed on the moving company's carts. Again, it was very important to retain all the items in alphabetical order and then chronological order while on the carts. To ensure this was the case, only single stacking was allowed. The carts were then lined down the center aisle in alphabetical order and a librarian numbered them on a bright purple piece of paper. The spreadsheet of titles was consulted to make sure all titles were accounted for.

Step 3: Pulling Items from the third Floor and Moving to Offsite Storage

Team 2 was instructed to pull all items with an "O" starting with a green flag and ending with a pink flag in alphabetical order and place them on the moving company's carts. A librarian then numbered these carts on a bright pink piece of paper and noted if a title spanned more than one cart. Due to the library building floor plan, moving the volumes to offsite storage was a process that involved the efforts of three workers. Carts were left in the front of the offsite storage location for Team 1 to integrate items with items already pulled from offsite storage shelving.

Step 4: Integrating the Collections

The librarian supervisors had an alphabetical list of titles and directed the order in which they were placed on the shelves

in offsite storage. Cart 1 from offsite storage was brought to the first range and the first title was placed on the shelf. That same title was then found on Cart 1 from the third floor and added to the shelf. If the title was only on the third floor and not in offsite storage, it was added to the shelf before moving on to the next title. The librarian made sure that the number of volumes was correct before moving to the next title and then did a spot check to make sure the volumes were in chronological order until members of the moving company learned the process. When shelved, the librarian highlighted the title on the title list before moving to the next title.

All four steps were repeated for all forty-one ranges in offsite storage. This took about three weeks to complete.

Phase 5: Discarding or Repurposing Material on Third Floor

After the above phases were complete, just over 37,000 volumes remained on the third floor. Initially, the moving company was going to remove these items in a similar manner to the process in Phase 1. However, the unit lead for RAD realized that without the bound journals on the third floor, the sound carried. She worried the noise would be a distraction for students when studying in the new space. The Arizona State University Library recommendations on library spaces note that "the physical design of the stacks on two levels: as physical locations in the library as a whole and as spaces to which users want to go" and advises that "the library must be developed as a space that is not merely functional but guides users to the best aspects of itself."[16] For these reasons, it was decided that around 3,500 of the bound journals marked for discard on the third floor should be retained for decorative and noise abatement purposes. This would be enough material to fill three ranges front and back with the decorative journals. These items were removed from the catalog and not allowed for check out.

Step 1: Marking and pulling items for decorative noise abatement walls

First, the unit lead of RAD determined a color palette of the journals that should be kept for the decorative noise abatement walls. Orange, teal, gray, black, and three different shades of green were selected to retain. The cataloger and the electronic resources and serials librarian, in conjunction with the unit lead, selected items that were not damaged by the sun. Because these items would be decorative, the spines could not be marked. Instead, a pink slip of paper was put inside each volume selected to retain.

All items had to be removed before the remodel could begin, and accordingly the selected decorative journals were pulled by the movers and taken to the moving company's warehouse. The moving company pulled the marked items and then sorted them into boxes by color. The boxes were then loaded on to a pallet and shrink wrapped before moving to their warehouse for storage.

Creating the decorative noise abatement walls was a separate project that began after the remodel was complete.

Step 2: Remaining material and shelving

The remaining journals were then discarded in a dumpster behind the library. The shelving from the third floor was then dismantled and removed. This took around ten days to complete.

Challenges and Future Projects

The movers available to shift each day were not always the same people, so brief trainings had to be given each day before work could begin. This was a good practice so that both movers and librarian supervisors were all on the same page. It also allowed librarians to review safety and operational guidelines with the movers.

Many of the movers were not familiar with libraries or how items were shelved. Library supervisors had to watch them closely and sometimes jump in and help move items to ensure that material stayed in the right order. This was especially important when integrating the material from the third floor with items offsite. There were times when material was shelved incorrectly and then had to be pulled and reshelved. While this is not unusual in libraries, the movers were extremely frustrated when this occurred because they saw it as wasted labor. However, fixing the problem in the moment allowed us to prevent problems for locating material in the future.

Some titles were shelved with another title or continued as a different title and were shelved out of alphabetical order to accommodate the new title. This presented some challenges along the way, especially when pulling items for donation, as the items could not easily be located. The catalog record had to be consulted for these titles to find where the continuation was shelved. Because of this, the team chose to combine the runs of certain titles for easier access in the future. For these titles, item records were either moved to a new record in the catalog or the "shelved with" 590 note was deleted. Similarly, it was decided to include supplements chronologically with the main run rather than shelve them at the end of a run. This should make it easier for ILL staff to find and pull information for requests.

After the journals were physically moved or discarded, the catalog had to be updated to reflect these changes. This process was a bit more time consuming than originally

thought. Using OCLC's WorldShare Management Service (WMS), ten records were deleted at a time to maintain control and consistency of the records withdrawn from the catalog. Luckily, this was done by OCLC number and not on the item level. Although the process was time consuming, it ensured that nothing was deleted accidently and also removed holdings from WorldCat. This took around a month to complete. Document delivery request buttons were added to the records of items held in WorldCat Discovery, so that users could still request these items.

As of the writing of this paper, the project to shift the journals back to redistribute weight on the shelving in offsite storage continues. This should help extend the lifetime of the shelving and create a safer environment for pulling the material for ILL and document delivery requests. Upon completion of this shift, an inventory may be conducted to ensure that the journals on the shelf are accurately represented in the catalog. Similarly, a complete audit of the library's holdings in Docline, the National Library of Medicine's ILL request routing system, will also need to be conducted to make sure that it is up to date.

It is difficult to determine the long-term effect that discarding nearly 78 percent of the library's print journal collection will have on users. While RAD attempted to keep the materials most likely to be requested, it is difficult to predict future use as research needs change and evolve over time. In most cases the HSLIC had electronic access to the material that was discarded, but electronic access is not always stable, for example, when access is through an aggregator database. Additionally, images/graphics, tables, data, even advertisements are not always included in electronic access. Further research including analyzing ILL requests will need to be done to determine how the decisions have affected the HSLIC users and the collection.

Lessons Learned

A project on this scale involved the entire library and even campus administration. The library's RAD unit created selection criteria and managed the move of the collection, but in order to meet this goal and the timeline volunteers from other units were needed. The library's administration helped coordinate the location of dumpsters and the communication with those who might be affected.

The most important lesson learned along the way was the value of patience and the ability to be flexible. Even though detailed project plans and processes were outlined for both librarians and moving company employees, unexpected problems were encountered that forced a different approach. For example, the moving company employees noticed that some of the shelving in the offsite storage facility was unstable. Because there was concern for safety, the project had to be put on hold for a few days to determine if the shelves could be secured. Because there were issues with our shelf maintenance agreement, the material had to be removed from the shelving and stored on carts rented from the moving company for more than a year until this could be resolved.

The shelving was unstable, in part, because the shelves were overloaded with material. Not only was an accurate measurement needed for linear feet to ensure that all material retained would fit, but an estimate of how much that material weighed as well as knowing how much weight each shelving unit can hold would have been helpful. The author of this paper recommended to library administration that the material moved offsite be shifted to the back row of the offsite storage facility and spaced accordingly to evenly distribute the weight on the shelves. This project is currently underway.

While the weight of material on the shelf was not considered, a rough estimate of the weight of the material being discarded was calculated to determine the number of dumpsters needed. This was important because the overall cost was based on the number of dumpsters needed. Also of importance was the amount of material disposed of per day and when a replacement dumpster could be ordered. If it was not ordered on time, the removal of material could be delayed.

Overall, patrons were not concerned that journals were being removed from the library and storage. They were, however, concerned what was going to happen to those journals. The most frequently asked question was, "Are the journals being recycled?" The moving company assured us that this would be the case, however no further details were provided.

Conclusion

The task of "clearing the third floor" was so much more than simply removing all the material from the floor. It involved a thoughtful approach to select titles to retain, determine titles that could be used by others or in creative ways such as the decorative journals, then develop a plan to actually remove material—first in offsite storage and then the third floor of the library—in a manner least intrusive to users, and finally cleaning up the catalog so that users could still find and request material. The project also involved coordinating with several departments and individuals both internal and external to the library, including the moving company, so it was important to have a shared understanding of the scope of the project with each group. It was equally important to communicate the scope as well as the progress of the project with stakeholders and be available to answer questions that might arise.

While the project was anything but simple and shifting to redistribute weight continues as of the writing of this paper, the method to remove and integrate material was successful. The moving company consulted with us later to use

the same method on another library move. Therefore, this method can be adapted for both larger and smaller library moves by determining the number of people and amount of supplies needed for the project. No matter the size of the library or scope of the moving project, it is important to have a project plan, be flexible in its implementation when unpredictable issues arise, and communicate progress and problems with all stakeholders throughout the process.

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Appendix: Criteria for Discarding and Retaining

Discard if:

- Available electronically, either purchased access or via stable, open access repository
- Short run or run with a lot of gaps, and no use
- Duplicate volume (keep no more than one copy or a title or individual volume)
- Very low or no use, provided the title is available from other libraries

Consider discarding if:

- Low/no use and available electronically, non-perpetual access from publisher or aggregator
- Any of the below factors, assuming the title is held at the collaborative storage facility
  - Low/no use and not core
  - Low/no use and not a current e-journal subscription
  - Low/no use and title ceased publication
- Non-English language and no use
- Out of scope
- Holdings at main campus library and not clinical/health sciences topic (i.e., chemistry, biology, psychology, child development)

Retain if:

- Medium to high use (five or more soft uses in OCLC)
- Electronic access is not perpetual
- Collaborative storage facility does not have any of the title or lacks a large portion of the title (less than twenty volumes is a general guideline)
- Title is frequently loaned via ILL
- Core or 'important title,' or on Abridged Index Medicus (AIM) list
- Journal has a lot of image content (such as journals in specialties of pathology, radiology, and surgery)
- Backfile too expensive to purchase
- Journals with local or special interest

Book Reviews

Michael Fernandez

Managing Data for Patron Privacy: Comprehensive Strategies for Libraries. By Kristin Briney and Becky Yoose. Chicago: ALA Editions, 2022. 176 p. $69.99 softcover (ISBN 978-0-8389-3828-7).

Data is everywhere. It comes in forms one would expect, like numbers in a spreadsheet, but it is also images of patrons and video of your building, along with other types of data. How each of these types of data is used, and maybe more importantly, is protected, is essential for libraries to consider. *Managing Data for Patron Privacy* provides an informative look at digital library data from multiple angles.

While privacy and keeping information confidential is a core practice in librarianship, authors Kristin Briney and Becky Yoose have set this book up to provide the context as to why these are important matters. The book does not serve as a critical lecture but provides cautionary examples of how data leaks and breaches of insecure data could potentially affect libraries and their patrons.

The book is organized in a manner that allows the reader to naturally progress from data novice, to then begin considering what types of data they encounter in their libraries, and finally move on to thinking about how they can improve upon current practices. Briney and Yoose do a good job of opening the eyes of their readers so that every aspect of the data involved is considered. They also make sure that data use with external vendors is covered in terms of what information vendors have access to and what librarians should think about when choosing the third-party vendors they work with. In the last few chapters, the book transitions to discuss strategies librarians can employ to better protect the data they work with.

The main goal of this book is to make readers aware of strategies they can take to protect their libraries and patrons' data by asking: how can we do better? This aim is lofty for the short page count of this book, but it is a worthy goal. Data privacy and protection is a very important topic to cover, and this book provides a unique angle on the subject. Other titles covering the subject have only aimed to provide insight into the basics of patron privacy, looking no further than the most obvious types of data and discussing how to handle them.

Managing Data for Patron Privacy always aims to question what libraries can do better, not just glossing over past data breaches and leaks. One way that the book seeks to provide relatable experiences to the reader of how to question current data practices is through case studies that build from each other at the end of each chapter. Often case studies come off as unrealistic or too hypothetical, but the ones represented in this book cover discussions and projects that believably would occur in the workplace.

The authors also do a good job of writing in a way that conveys the importance of the subject to readers that may not feel that this topic is for them because of a lack of technological skill. Everyone that works in a library deals with data in some way. While this book could be useful to all library workers, it would be most useful to policymakers that dictate how data is dealt with in the workplace. It is an interesting and enlightening read that could also provide useful supplemental reading for other library workers that would like more context as to why the data landscape is the way it is. The information presented would meet the needs of library management, access services, reference/research, and electronic resources departments. By being a book readable by many people within libraries it succeeds in broadcasting information that may be unknown. This helps the book accomplish its main goal of encouraging library workers to question how the industry can do better regarding the protection of patron privacy within the library data.

The book also succeeds in the sense that there are no glaring omissions in the types of data that libraries work with and should consider how to handle. For a book as short as this one, it is admirable the amount of content the authors were able to include. While the book does address how to assess vendor relations and how to handle vendor separation regarding library data, it does not address how libraries are often at the mercy of their third-party vendors and how they dictate procedures.

In *Managing Data for Patron Privacy,* Kristin Briney and Becky Yoose link chapters that take readers along for a ride to identify how patron data is used and kept in library systems, while looking to answer the question of how libraries can do better. The book clearly demonstrates methods and strategies for libraries to do just that in present terms. Readers do not need to wait to apply what they learn from this book allowing for an immediate benefit. This all does leave the question: What about the future? Could the data landscape completely shift changing everything? It will be thought-provoking to see where library data and patron privacy stand in a handful of years.—*Brittney Bergholm (Brittney.buckland@gmail.com), Goffstown Public Library, Goffstown, New Hampshire*

The Weeding Handbook: A Shelf-by-Shelf Guide, Second Edition. By Rebecca Vnuk. Chicago: ALA Editions, 2022. 240 p. $49.99 softcover (ISBN 978-0-8389-3717-4).

Rebecca Vnuk's new and updated edition of *The Weeding Handbook* is a thoughtfully written book that can spark a lot of creative thinking as well as assist with careful planning of weeding projects, large and small. Weeding a library's collection can often cause tension and sometimes high anxiety for many who work in and manage libraries. Vnuk's experience managing public library collections and extensive background in book reviewing, consulting, and training makes her a librarian with considerable understanding of the difficult issues that surround weeding of collections. Vnuk's second edition of *The Weeding Handbook* is a very useful book to read for building confidence around the decision-making involved in weeding collections. Vnuk writes, "A library is an ever-changing organism. Weeding helps a library thrive" (XV). This statement drives the narrative of the book, and it is something that is always important to remember when one is stuck in the weeding trenches and feeling indecisive and anxious on the decision processes. While Vnuk's new edition of the handbook may in part resemble her first edition, published in 2015, this book feels refreshed, with recently authored suggested readings. Many sections of the book include short and original weeding thoughts and ruminations from librarians across many parts of the country from an assortment of library types and sizes.

The Weeding Handbook is organized for a Dewey Library, offering chapters on each area of the collection, shelf by shelf, as Vnuk explains it. The book includes a chapter on other areas of the collection, with discussions on formats besides print books—such as DVDs and audiobooks—and a much-needed discussion on weeding e-books. The section on e-books is one area of the book that could have been more extensive in this second edition. Vnuk offers the suggestion that "libraries should strive to have their electronic collections meet the same standards as the print collections" (85), but this is still an area that could use its own chapter. The chapters on various areas of the collection—the 900 call numbers, for instance—each offer basic concepts to consider as one makes their way down the aisles of the library, looking for the books in poor condition and outdated material. Vnuk frequently mentions the free CREW manual (from the Texas State Library and Archives) and its concepts early in the book (XX),[1] as she explains that it is a work that will assist someone beginning to weed with formulas and a methodology. Vnuk describes her approach as "intended to give library staff the knowledge and confidence needed to effectively weed any collection, of any size" (XXI).

And it is in building library staff confidence to weed, as well as communication about weeding efforts, where Vnuk makes her book an important one for libraries to have on hand. Vnuk talks frequently about good communication, where she considers the importance of internal communication as well as with the public perception of collection weeding. Both internal and external communication around weeding is necessary, and much of the book is dedicated to this important concept. In addition to engaging discussions such as chapter 11, "Weeding Gone Wrong," the book includes many detailed sample collection development plans, from a good sampling of library types. Sharing collection development plans with the public helps users understand the methodology and timing of planned weeding so there are less surprises and no horror stories. Vnuk relates an interesting story early on in the book about an incident that she was personally involved in, at a Chicago Public Library regional branch, where staff were not consulted fully. To top it off, a local alderman heard that the library collection was being decimated, with the story ending up in the pages of the *Chicago Tribune* (XVI). Collection development plans can also provide a good basis for library staff discussions on weeding, including weeding approaches to take and how frequent to take them. The "Weeding Gone Wrong" chapter particularly provides useful tips for libraries that may sometimes face an unfriendly trustee, budget manager, or public. Vnuk's book offers no hard-and-fast rules, and she frequently discusses the various kinds of reports that libraries can now run through their integrated library systems, to work from. While her intention is that the book should serve a variety of library sizes and types, she states, "you will still have to come up with the magic number that works for your library to apply to that data" (XXVIII).

The Weeding Handbook includes several important short chapters to make note of, especially for sparking internal library staff discussions. One such noteworthy chapter is on building and weeding a collection around agreed-upon principles of diversity and inclusion. Again, Vnuk quotes the CREW principles, which advise that "material that contains biased, racist, or sexist terminology or views" should be weeded (106). Her suggested readings in this area are both very current and relevant here, including the concept of the diversity audit, which may be new for many in libraries.

Vnuk's second and updated edition of *The Weeding Handbook* has much to offer in managing collections and is written with a sense of grace as well as a sense of humor. It is a book that should be by your side when planning and managing a weeding project in any kind of library.—*Amy Lewontin (a.lewontin@northeastern.edu), Northeastern University*

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