

## Serials Analysis Directions Part 2: Finding Gems, Pulling Weeds, and Reclaiming Space: Case Studies from GreenGlass for Serials

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### Abstract

The presenters of the session, “Serials Analysis Directions Part 2: Finding Gems, Pulling Weeds, and Reclaiming Space: Case Studies from GreenGlass for Serials” provided attendees with valuable perspectives on using GreenGlass for Serials to conduct serials collection review projects effectively, efficiently, and with more confidence. The first two presenters, Katy Gabrio and Ann Roll, are librarians who have used GreenGlass for Serials. They shared their reasons for reviewing serials collections, their libraries’ goals for the projects, and the results. The third speaker, Andy Breeding, a senior product manager at OCLC, spoke about the history of GreenGlass and GreenGlass for Serials, as well as the time savings gained from using GreenGlass for Serials, and trends he noticed in serials holdings of libraries through the years.

**Keywords:** serials, collection review, collection development, weeding

The session began with Katy Gabrio, associate library director at DeWitt Wallace Library, Macalester College in St. Paul, Minnesota,

talking about using GreenGlass products to analyze the library's collections. Macalester College is a four-year, undergraduate liberal arts college with a student body of about 2,000. Gabrio is part of the library's Collection Development and Discovery Group, which provides for collection development, acquisition, access, and preservation of the library's collections. The library's print holdings include about 2,900 print serials titles and approximately 329,000 print books. The library staff used GreenGlass for a previous collection review of the library's print book collection, and subsequently weeded thousands of books; later, they completed a follow-up review. Due to the success of these projects, the library plans to review collections annually.

Katy Gabrio emphasized that the Macalester College library devotes staff and financial resources to accomplish its stated collection goals. She adds that the library's primary collection goal is to support the curriculum and research needs of the college community. The library has a long-term vision for how they want the library spaces to evolve, which is flexible to changing needs. Library staff have seen an increased need from the college community for group spaces and spaces for external departments. Because the library must continue to house needed materials as well as provide space for other uses, library staff needed to reduce the size of the print collection.

Gabrio emphasized that library staff have noticed how acting on results from the earlier GreenGlass collection review projects for the books collection have enabled them to address their space needs: "putting resources into collection management can help their vision become a reality, especially when it comes to our space within the building."<sup>1</sup> When DeWitt Wallace Library staff decided to do a collection review project on the library's serials collection, they opted to use GreenGlass for Serials to facilitate serials collection development and management decisions. Gabrio added that library staff looked at several different areas for weeding, beginning with accessibility of the collection. This is because some print serials were on high shelves and inaccessible to many. In addition, despite years of weeding of print serials that overlap with the library's journal archive access, the library's

GreenGlass for Serials review showed the library had seventy-four titles of print holdings that overlapped that access. The number of volumes of those titles ranged from a few to many, and others were print holdings that had been weeded but the print holdings record had not been updated after the fact. She added that the collection review data in GreenGlass also contained helpful information on any preceding and succeeding serial titles. Gabrio said, "it's helpful to be clued in if you're making a deselection decision about a title to know whether or not that title had been published under a different name . . . so that you can make the selection decisions on a title based on its full publication life cycle."<sup>2</sup>

Gabrio added that the DeWitt Wallace library also has a goal to participate in larger efforts to preserve scarcely held materials and recently used GreenGlass to do a collection review as part of a pilot shared print program. She emphasized that collection review helps the library reduce the print collection's footprint while still maintaining access to needed materials and navigating space constraints, issues that Gabrio noted many libraries face. Gabrio concluded by saying that the library plans to finish the bound periodicals review, review serials shelved in the regular stacks, expand the diversity of the collection in publisher location and language, and continue to identify and update records for scarcely-held serials. She reflected on the project, specifically on the time saved by locating actionable information about the collection to support decisions on what serials to weed, preserve, or retain. Specifically, the process used to take hours of staff time gathering information, but with GreenGlass for Serials, it only takes minutes.

The second speaker was Ann Roll who serves as associate dean for collections and scholarly communications at Pollak Library, California State University, Fullerton. Roll spoke about her library's experience using GreenGlass for Serials. Comprising about 40,000 students, California State University, Fullerton is one of the largest campuses in the twenty-three campus California State University system. The library has previous experience using GreenGlass for projects involving

monographs, much like Macalester College's experience. Also, much like Macalester College's experience, the library had experienced increased demand for library space for other purposes, such as group and individual study space, which meant the library needed to weed the print collection.

Roll explained the goals of the library's serials review project, including large scale weeding of nonfunctional compact stacks, verifying the scarcity of items in the university archives and special collections titles, and looking for options for government documents weeding. The library's basement area contains backfiles of periodicals that are shelved on compact shelving that does not function. Roll noted that the library's first task was to reduce the number of volumes on the non-functioning shelving so that only materials to be retained would need to be relocated.

The California State University, Fullerton library is a member of Western Regional Storage Trust, a shared print journal repository also known as WEST, and the library had been weeding items from the collection after confirming they were archived in WEST. Roll noted that through the GreenGlass for Serials analysis, they weeded indexes that were no longer needed because they already weeded the indexed serial. Of the few remaining serials, some are good candidates for the library's archives. Roll noted that the library suspected that there would not be many unique titles in the collection, and they were correct. One unique serial is *Dimensions*, a journal of undergraduate research that is published at the university. Roll noted that some of the *Dimensions* holdings in the serials collection duplicate what is in special collections and others are unique. The unique volumes were moved to special collections to help round out those holdings. Other unique items of note include serials relevant to local history. When library staff began looking further at the scarcity of the serials in the university archives and special collections, they found over half (or 147 of 263) of those titles have fewer than five holdings in the United States. Some of the holdings are located in the Freedom Center collection, a collection within Pollak Library special collections, and contain materials on far

extremes of twentieth-century alternative political, social, and religious movements, such as labor, anti-community, anti-war, counter-cultural lifestyles, ecology, gay liberation, animal rights, and revisionist history.

The last goal for the Pollak Library in the serials collection review project using GreenGlass for Serials was to review the library's federal government documents. The library is a selective depository and has been weeding print government documents for several years. Roll emphasizes that weeding of government documents must follow depository rules on how to dispose of the weeded government documents, such as offering them to other libraries and making sure they are held within regional government depositories. In reflecting on the success of the serials collection review, she notes that GreenGlass for Serials allowed for a more robust review of federal depository regional collections, including state libraries of neighboring states and other large depositories. This additional information gave the government documents librarian confidence in making the best collection development decisions and ensuring access to needed materials. It also allowed for the discovery of several government documents serials that were located in the general stacks and included them in the collection review. Roll states that the library staff want to do further analysis of the library's collections in the future, specifically serials that are not located with the other serials. Due to the nature of the way those projects were set up, those serials were not considered in the review of the print book collection since only monograph records were included. In addition, she stated that the library also wants to compare the print serials collection with the library's e-serials for any duplication.

Andy Breeding, the third speaker, is a senior product manager at OCLC. He emphasized what OCLC has learned from such projects and the librarians they have worked with. The original GreenGlass service was exclusively for monographs. It has been around since 2014 and has aided hundreds of libraries across six countries in collection management projects. Breeding added that monographs are

often duplicated in other library collections; specifically, 72 percent of library monographs are duplicated in more than 100 libraries as compared to 59 percent of library serials being duplicated in more than 100 libraries.

GreenGlass for Serials is a new tool as of 2021 and focuses on doing for serials what GreenGlass does for monographs: GreenGlass for Serials is a decision support tool that helps libraries manage their print collections by combining data from the library's online catalog, OCLC library holdings, and journal archive information. The tool reveals the extent to which the library's serial holdings are duplicated elsewhere. He added that he noticed that serials that are local in focus tend to be more scarcely held. He added that OCLC defines scarce titles as those with fewer than five U.S. holdings, which is 2 percent of those in the average monographs collection and 6 percent in the average serials collection.

Breeding indicated that libraries' serials data is often messy, and he often hears libraries apologize for their data. He nonetheless emphasized that OCLC can still do useful things with the data. For example, he has seen data with incomplete or inaccurate holdings summaries, titles that lack holdings records, holdings statements that are inconsistent or hard to interpret, and journal archive data that can be difficult to interpret. Breeding added that even with messy data, OCLC can extract information that makes it easier and quicker to identify withdrawal or preservation candidates. He noted that shared print initiatives have tended to focus on journals, but other types of serials, specifically reference books published as serials, serials in book stacks, and small publications of local interest, are also in need of preservation. Breeding notes that through GreenGlass, they have learned the necessity of pulling together title families and name changes, an issue that can be problematic when weeding. GreenGlass for Serials can also help identify clean-up opportunities, such as inaccurate and incomplete holdings data. GreenGlass provides libraries actionable insight on their collection holdings. However, Breeding emphasizes

that the goal in using GreenGlass for Serials should be to save time in making serials collection decisions rather than having pristine serials holdings data.

GreenGlass for Serials provides libraries with new opportunities to manage collections effectively, efficiently, and with more confidence. Both Gabrio and Roll needed to decrease the footprint of their print collections while maintaining access to key materials for their users. GreenGlass for Serials helped both identify serials for deselection and in doing so, repurpose space for other needs. Gabrio had an eye on future participation in shared print networks and the need to increase the accessibility of the collection. Roll identified more unique holdings than expected and plans a collection review of the library's e-serials to data in GreenGlass for Serials. Breeding spoke to the lessons learned and how using GreenGlass for Serials can save time in collection management projects.

## **Contributor Notes**

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## Notes

- 1 Katy Gabrio, Ann Roll, and Andy Breeding, "Serials Analysis Directions Part 2: Finding Gems, Pulling Weeds, and Reclaiming Space: Case Studies from GreenGlass for Serials," (Presentation, NASIG Conference, Baltimore, MD, June 2022).
- 2 Ibid.