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## **The De-selection en-masse at TUT: enabler for implementation of hybrid collections**

**Vivian Agyei,**  
Tshwane University of Technology (TUT),  
Pretoria, South Africa  
E-mail: agyeimv[at]tut.ac.za

**Session:**

**139 — Treating print in an increasing digital collection: issues, dilemmas and directions — Acquisition and Collection Development**

### **Abstract:**

*The de-selection of large numbers of print items was prompted by an institutional decision to adopt the model of a single faculty per site following the merger in 2004. This implied having to relocate large numbers of information resources among the nine libraries. The relocation, still continuing, was an opportunity for the libraries to strive to remain with only relevant, current and physically good items. Previously, each of the three merger institutions was offering a large variety of programmes which became duplicated as a result of the merger.*

*The process of moving collections to new parent (campus) libraries involved lecturers and librarians having to select items for relocation and dispose of the rest. Cataloguers were to change location of affected items. It became necessary to upgrade certain records and de-duplicate bibliographic records which had not been detected or for which time had not been made as yet. The whole process took much longer than was planned as some lecturers took their time to select items they wanted to retain and not all librarians were familiar with the new subject areas. Moreover, the librarians could not finalise the selection on their own. The criteria for de-selection were as contained in the policy on acquisition of information resources and that on collection development and management. The de-selection en-masse, despite its own challenges, created space and a good environment for implementing plans to increase e-resources.*

*Print resources will remain part of the TUT library collections. Regular and systematic weeding of collections is performed to preserve quality, currency and strength of collections. However, while weeding provides opportunities for replacing some print with e-resources, considerations for replacement, collection development and management – especially in developing countries – should include preference of some academic departments for print material; and the implications of increasingly acquiring e-resources for additional funds are required to enable access (e.g. availability of computers and the Internet) to clients who rely mostly on the libraries to provide it.*

## Background

Tshwane University of Technology (TUT) came into being in 2004 from a government-imposed merger of three technikons as a government directive to increase access to higher education to the historically disadvantaged while doing away with the concept of “white” or “black” institutions of higher learning. It was one of the milestones in building a democratic and non-racial South African nation. The new institution boasts nine fully-fledged learning sites: six with their own one or two faculties, three distant campuses with selected offerings from two or more faculties and more recently, three branch learning sites. The learning sites are spread over three provinces. All seven faculties are hosted on the six learning sites in Gauteng, two distant campuses in Mpumalanga and one in Limpopo. Currently, the total number of students is capped at 56,000. Each of the campuses or learning sites has a library which offers client services. Library support services are centralised. Those are: Information Resources Management (IRM) - Acquisitions and Cataloguing, IT & Systems, Document Supply and Electronic Resource Centres (ERCs) Management. The former technikons had a good number of duplicate faculties among themselves. Therefore, when the University went for the single faculty per site model, the library collections had to be moved to new parent campus libraries. There were lots of duplicates and in some cases, long superseded items. The libraries had to review all their collections to support the needs of departments. The one advantage was that the three merger libraries were all using a common library system though at different levels of advancement.

## Definitions

“**De-selection**” refers to the process of reviewing the quality of collections of information resources in which those not meeting collection management criteria are withdrawn from the collections and disposed of. The term is used interchangeably with weeding or withdrawal.

“**Electronic Resource centres (ERCs) and Internet Centres (I-Centres)**” refers to computer laboratories established to provide students with access to computer facilities and the Internet. The facilities are located in libraries on the various campuses, student residences and elsewhere on campus where space is found.

“**Hybrid library**” refers to libraries “containing a mix of traditional paper-based information resources such as books, scholarly journals and magazines as well as a growing number of electronic-based resources such as downloadable audio books, electronic journals, e-books, etc.” (Wikipedia, the free encyclopedia)

“**Pipeline students**” refers to students who, at the time of the merger, were in the middle of their studies towards a qualification registered at one of the technikons. It had been agreed by the merger partners that the students would complete those qualifications where they were registered before moving to the new site of their faculty if they wished to further their studies.

“**Technikons**” refers to institutions of higher learning offering vocational-based programmes with qualifications parallel to those of traditional universities up to D-Tech level. Technikons did not emphasise research but work-integrated learning and therefore worked closer with industry. Most of their programmes required at least six months practical experience before a qualification could be conferred. The government has since converted them to universities of technology.

**“Universities of technology”** refers to former technikons. The institutions offer vocational-based degrees. They may opt to be research intensive and compete with traditional universities for the best students, innovation and community development.

## **Background to relocation of large amounts of information resources at a go**

The institution intended for faculties to commence with their new offerings at their new campuses as from the beginning of 2007. However, by 2009 circumstances had impeded progress and many were not ready. The final instruction came in the middle of the second semester of 2009 that only pipeline students would be accommodated in 2010 as they had to complete studies where they originally enrolled. The libraries came under tremendous pressure to have relocated information resources by January 2010.

Many factors contributed to the delay in implementation of the institution’s mandate in this regard; to name a few:

- Reluctance of staff to relocate: the new locations of faculties were not necessarily a first choice for the staff to work from. Travelling distance, cost, time, heavy traffic in some instances, standard of living and campus culture were different. Therefore some staff did all in their power not to move.
- State of the facilities: the two historically disadvantaged technikons had fewer, if any, modern, good looking or well maintained facilities. Moving out of a city campus to a lesser developed environment was demoralising for staff of the third technikon. A lot of funding was needed to provide equitable resources. The government at first wanted the institution to utilise existing facilities. There was no promise of funding extra or new facilities. Therefore, the size of a campus was a great determinant of which faculty it could host given the government-approved student enrolment plans.
- Some staff and students from city campuses felt it unsafe to move to black townships.
- Perceptions that the single faculty per site model would lead to brain drain and loss of students.

## **Impact of the delay in finalising plans for relocation on the libraries**

As a support service, the Library and Information Services (LIS) had to wait for the final academic departments’ relocation schedule before commencing with processes. Academic departments together with librarians were to select material to be relocated. Without the staff willingness or enthusiasm to move, the process became very trying. The libraries wanted to ensure minimal disadvantage to the students. There were only five cataloguers processing new items and upgrading records as normal routine. Adding urgent workload for relocating items was too much. Trying to find temporary cataloguers also turned out to be a huge challenge as there is scarcity of people with that skill. The LIS first had to know the number of items to be relocated to estimate the time it would take, arrive at the number of cataloguers needed, then draw up a budget and request funding. The staffing need had not been foreseen and therefore it was not budgeted for. Processes to appoint temporary cataloguers took long. Although the aim was to have relocated all material by the time students moved, processing of some of the materials is still underway. At the beginning of 2012, there were 10,000 items remaining. The aim is to conclude the process by the end of June 2012.

## **Counter-action for short notice**

In order not to disappoint students, inter-campus loans were relied on though they had their own challenges such as:

- Delivery on time depended on the distance between campuses, transport and costs that had not been budgeted for.
- Distances between campuses – the longest is 300km and the shortest 30km.
- Return dates were also affected by distance and transport.

### **Criteria used for de-selection**

In order for the relocation of material to be effective for all concerned, it was agreed that duplicates, damaged and superseded items be removed from the collections during selection of what was to be relocated. It was inevitable to weed collections as they were being prepared for relocation in order to have a good quality of active collections. There was an opportunity for replacement of some items with electronic resources where available. The following criteria were communicated to the academic departments and used in deciding on materials to keep in the collections:

- Relevance to curriculum
- Age of items
- Language of communication and tuition in the new University
- Format; e.g. audio/video cassettes were to be weeded if not available in latest formats and subject no more relevant
- Availability in electronic format, e.g. if there was an electronic journal subscription or if a title was contained in database subscriptions
- Individual lecturers' preferences of print irrespective of age or edition or availability of e-format
- "Present and historical understandings" (Matlak, 2011).

### **Planning for the relocation of collections**

The goal was to relocate all information resources to their new faculty/campus in order for students of that faculty/campus to access them on site by January 2010. The resources for relocation were monographs, continuing resources, reference works, multimedia; etc.

A sub-committee on collection development and management was to coordinate activities.

### **Participants**

This process was team-based and the following were the main participants:

- All information librarians
- All lecturers per affected department
- Databases Content Librarian
- A Head of Library to oversee the process together with the manager for IRM.

### **Procedures**

Policies were consulted and procedures drawn up and workshopped with the rest of the participants by the team overseeing the processes.

## Communication

It was important to communicate regularly and often. Frequent meetings for direction, progress and feedback were held to help the process to go smoothly. Reports were prepared for the LIS Steering Committee, Faculty Boards and Academic Committee.

## Challenges

- Short notice to libraries – therefore they could not plan effectively. This was owing to late notification of student relocation by academic departments – libraries were sometimes the last to be thought of in planning student relocations. Therefore there were delays in making collections available at the new sites.
- Library staff shortages to attend to both normal and relocation responsibilities.
- Reluctance to open system access to counterparts to assist for fear of errors in the catalogue also contributed to processing taking longer.
- Unavailability/Scarcity of skills of cataloguers in the region who could be appointed to work in a temporary or part-time capacity.
- Need to provide for pipeline students complicated selection.
- Personalities delayed processes - The disgruntled: not caring, taking their time
  - Lack of trust for professionalism of colleagues
  - Level of subject knowledge – Although teaching the same subject, staff have different levels of subject knowledge. Therefore arguments over which items to take along ensued and in some cases led to stoppages.
  - Wanting to take all collections irrespective of existence of pipeline students or the general nature of content
  - Denial of access to counterparts – Refusal to let go even if parts of collections were no longer relevant
  - Slowness to embrace e-collections in favour of retaining print
- Accessibility of electronic collections  
As a developing country, South Africa has the challenge of providing access to computer facilities and the Internet to its communities. Many of the TUT students rely on the government financial assistance for their tuition and residence fees. The financial assistance does not cover all student needs for the reason that the funds are stretched to afford as many students as possible the opportunity to access university education. Therefore many students still cannot afford computer equipment. Their only chance of using them is to visit the libraries.
  - Computers – Libraries generally provide access to computers as part of information services
  - The national university student laptop initiative affords students who have financial resources to purchase laptops at a lower charge, financed by a bank at very low interest rates. ICT Services links the laptops to the backbone and assists with troubleshooting.
  - Internet connectivity and Wi-Fi hotspots – The Internet is generally accessible on and off campus. Also, the libraries have Wi-Fi hotspots. Students may also access Internet services from their mobile phones by linking to TUT4Life.
  - ERCs/I-Centres – Each library has an ERC equipped with computers with Internet access, printers/copiers, laminating machines, guillotines, scissors,

staplers, etc. for the convenience of students. I-Centres serve the same purpose but are located outside the libraries including in student residences. The facilities are fully funded from student levies and are run by ERC Officers and student assistants reporting to a manager. Students access electronic information resources from the centres, type assignments, access e-mail, social networks, do some private work including preparing curriculum vitae, job hunting and gaming. There are currently 1,400 computers TUT-wide giving us a computer to student ratio of 32. Attempts to obtain more are underway.

- Seating - Although the Wi-Fi hotspots are a necessity, they bring with them the need for more seating for students to do academic work. They are good for quick access to e-mail, chats; etc. Power plugs for recharging phones and laptops must be provided. It has been found that the libraries, ICT Services and Technical Planning Services need to work collaboratively to achieve optimal provision for student computing services.
  - Printing/downloading – The need for facilities for downloading information remains. While e-learning is beginning to take off at TUT, there is still need to provide traditional physical facilities for downloading. Many students still need to work on printouts from home or anywhere outside the libraries. Moreover, some lecturers still require printed assignments.
- Preference of print material over e-resources – During the process of selecting material for relocation, it came to our attention that some lecturers preferred to retain print formats even where there were electronic versions available in the collections. The LIS therefore had to accommodate them in certain instances, especially with monographs because continuing resources are costlier to maintain. The LIS also had to accommodate students who do not have access to computers at home. Those are very difficult decisions to make and until the libraries have accumulated funds to purchase iPads or other e-readers to loan out to students, some e-resources have to be duplicated in print.
  - Lack of cooperation between faculties w.r.t. selecting interdisciplinary material for relocation; e.g. materials for engineering and computer engineering – It has been found that what was relocated from one faculty is being bought to fill the gaps in the other.
  - Retention of all editions in order to move all material on a subject rather than selecting – That caused the process of de-selection to continue unendingly. It also put strain on human, financial and physical resources.
  - Availability of funds for replacements or e-resources – The development of e-resources collections depends on availability of funds to procure, maintain and provide access to them. The LIS has not received any major boost in funding for information resources. Only, in distributing the funds, the allocation for e-resources has been increased over the years with the aim to eventually have lesser print resources. Currently, e-resources take up 56% of the budget.

## Implications for LIS human resources

There is evidence of a marked growth in e-resources since 2009. The staffing needs have also markedly shifted from traditional handling print to handling e-resources. The skills sets required are different and more demanding of ICT utilisation than before. The rigid human resources planning policies by some of our institutions need to be negotiated to accommodate the changing needs of the libraries, which might differ from those of the rest of the institution. Our institution was not prepared for that. The highly unionised environment also makes it difficult to act timeously on redundant positions; e.g. addition of responsibilities and reskilling some of the incumbents and perhaps redeploy some to other departments within the LIS which have needs.

The growth in e-resources has resulted in a negative impact on inter-library loan requests and supply, and continuing resources administration. This has affected the productivity of the staff in those departments.

The graphs below show the impact of growing e-resources on some categories of print collections:

### New print continuing resources ordered

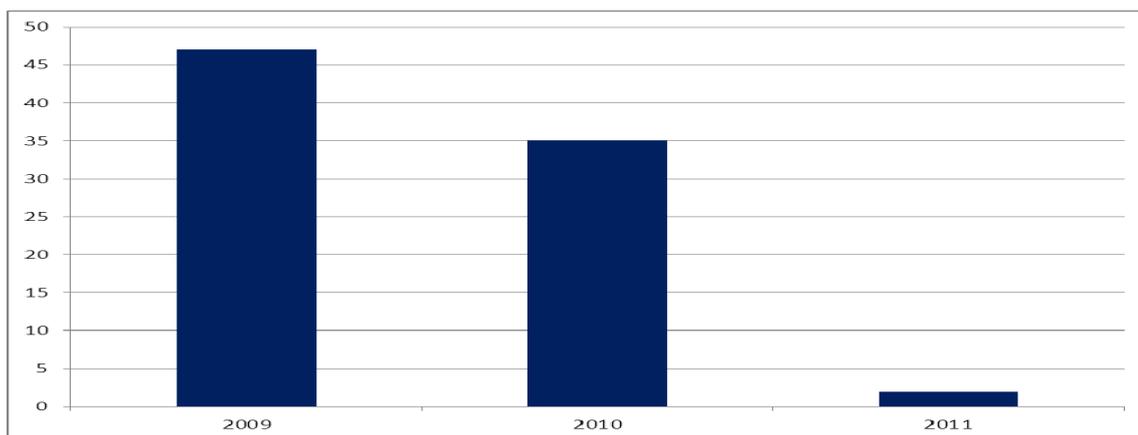


Figure 1: New print continuing resources ordered 2009-2011

## Continuing resources received

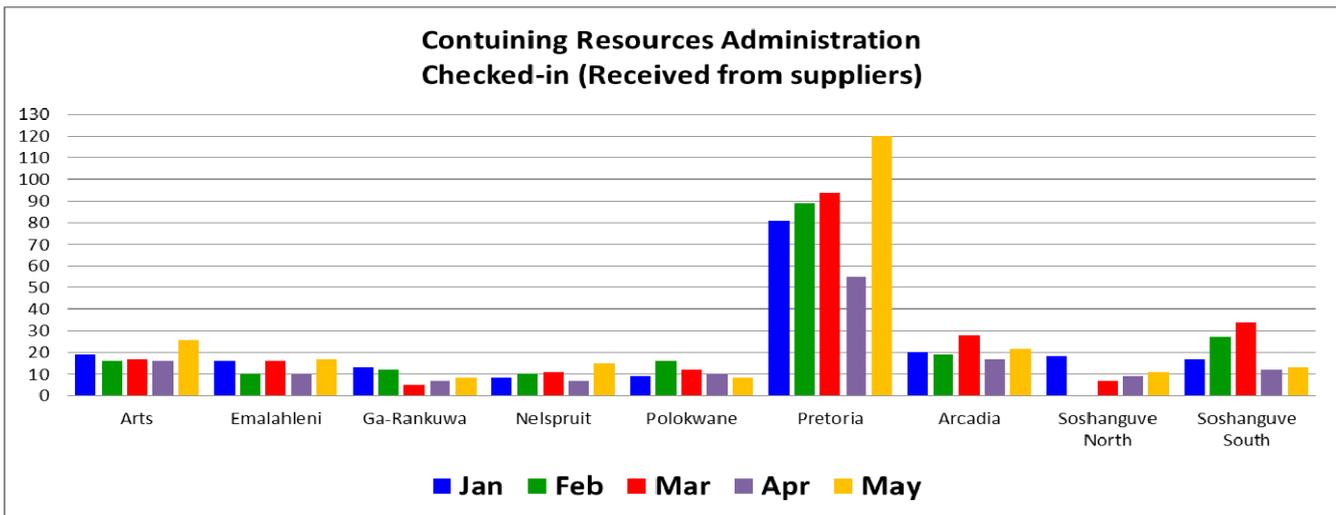


Figure 2: Print continuing resources checked-in January-May 2012

## Inter-library loans requests

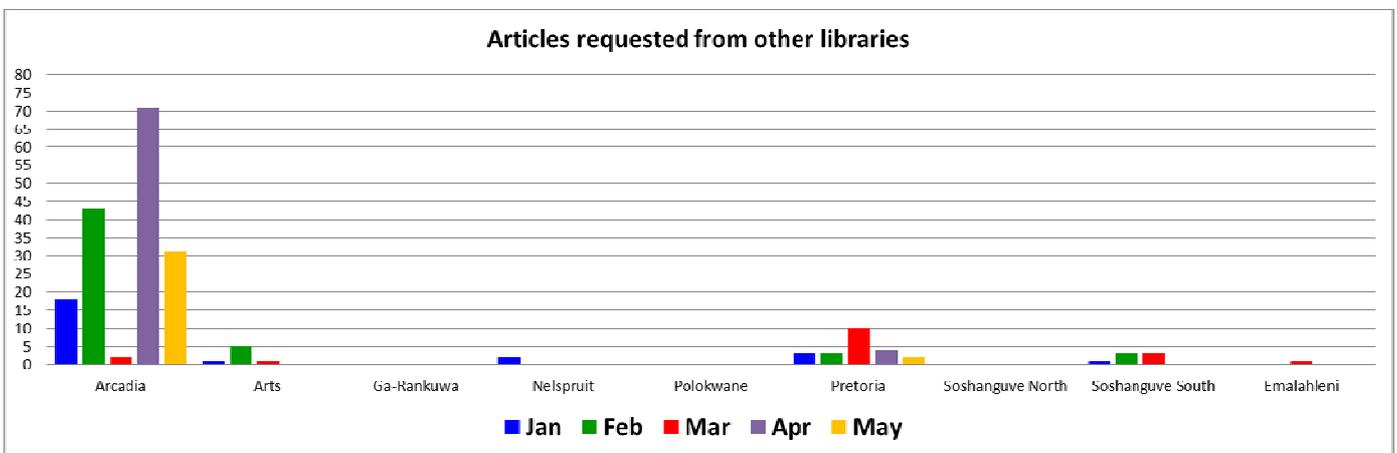


Figure 3: Inter-library loans processed: January-May 2012

### Other statistical information about the collections

- Until 2011, 32,556 items were relocated with 11,000 remaining for 2012.
- 150 databases had been acquired. TUT could finally boast to have a core collection of information resources to support all its offerings.
- 2070 print journals were in stock with 700 current.
- 252,826 print and multimedia items were in stock.

### Items relocated

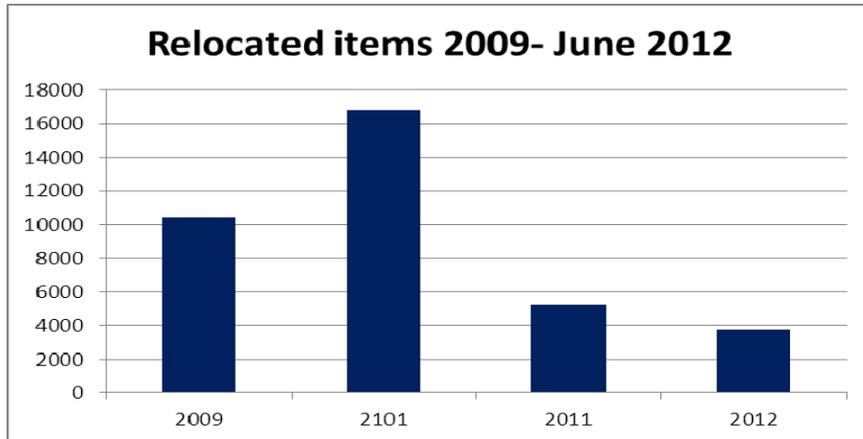


Figure 4: Relocated items 2009-June 2012

Although 2011 was to have been the last year for relocation of the large number of identified information resources, in order to meet deadlines for closing the project, the librarians decided to do the selection themselves. De-selection was also done by librarians only as it became clearer which resources would be better suited for which faculty.

### Items de-selected

The number of de-selected items increased highly in 2011 as compared to 2009-2010. This was owing to librarians taking the decision to do the task without faculty in order to facilitate the conclusion of the project.

### Items de-selected

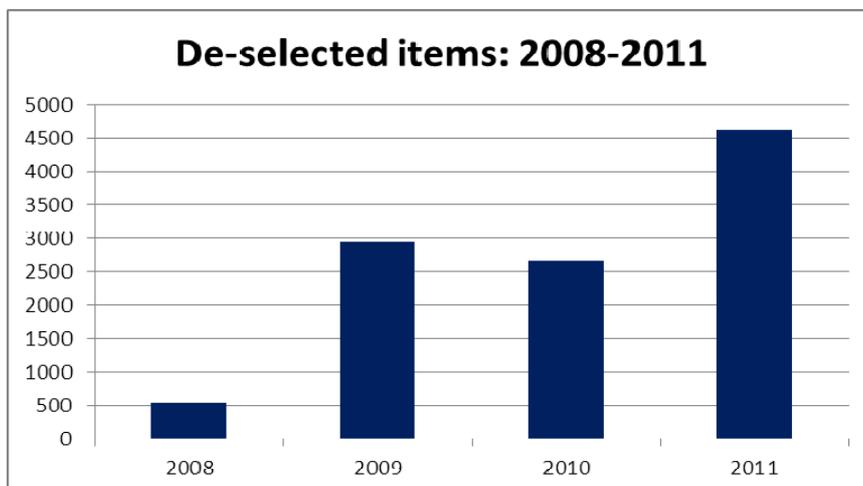


Figure 5: De-selected items: 2008-2011

## Disposal of de-selected items

University assets are disposed of according to the policy on disposal of movable assets. The LIS has to obtain permission from the CFO to write off the items, stating how they would be disposed of within policy. According to policy, written off information resources may be sold if still good, otherwise they would be offered to

- Staff
- Students
- Local community libraries
- Institutions abroad which require English-medium literature.

## Budget distribution for information resources, 2008-2012

The distribution shown below reflects a steady growth in the allocation for e-resources whilst reducing the growth in allocation for print resources. There is a marked decrease in subscription to print continuing resources for most titles are covered by database subscriptions and academic departments are slowly choosing electronic resources over print. As from 2011, funds were set aside for development of e-book collections. TUT is still finding its feet regarding provision of accessibility for e-resources as most of its student body is from poor backgrounds. The possibility of buying iPads and other e-readers for short loans is one of the options being investigated to alleviate students' challenges regarding access.

Year	2008	2009	2010	2011	2012
<b>Total Allocation</b>	6,500,000	7,000,000	12,624,386	13,265,412	14,061,337
<b>Continuing Resources</b>	2,000,000	2,673,387	1,597,743	1,326,901	1,525,514
<b>Print books/MM</b>	2,225,000	1,936,727	5,861,978	6,147,695	4,796,234
<b>Databases</b>	2,000,000	3,155,800	5,000,000	5,100,000	6,000,000
<b>E-books</b>	-	-	-	1,400,000	2,000,000

Table 1: Information resources budget distribution 2008-2012

The distribution for continuing resources, monographs and databases was almost similar in 2008. However, the differences began to show distinctly as from 2009, resulting in the marked growth of e-resources to date. E-books were only budgeted for as from 2011. Their allocation also increased in 2012.

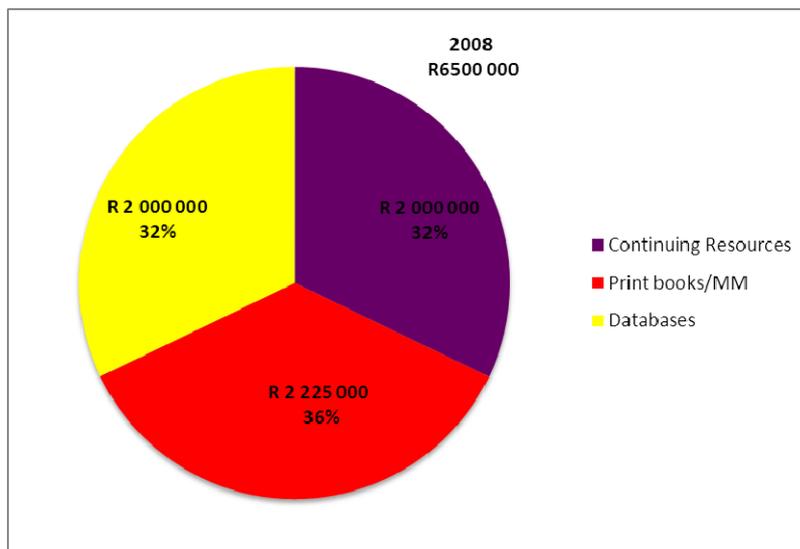


Figure 6: Information resources budget distribution 2008

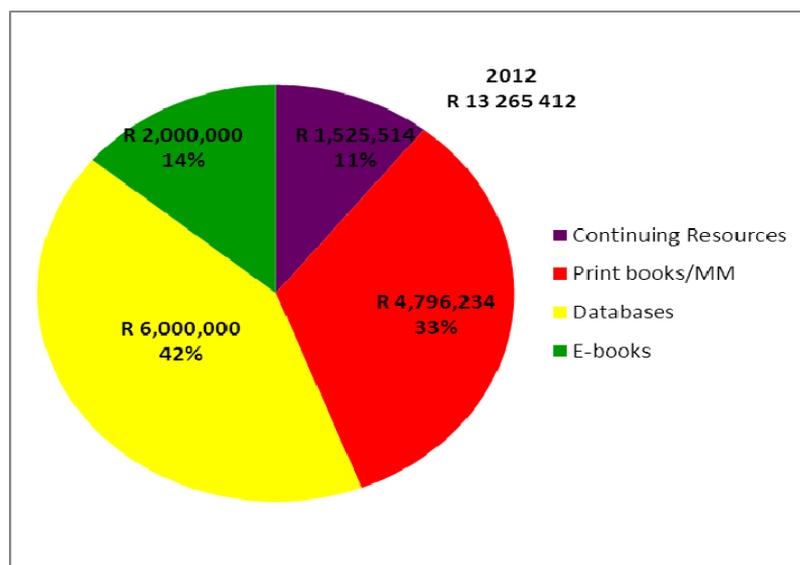


Figure 7: Information resources budget distribution 2012

### Lessons learnt from the de-selection exercise

De-selection must be thoroughly planned for

- ❖ As a stand-alone process
- ❖ Not as part of relocation of faculties
- ❖ Not to be done during the middle of a merger
- ❖ Ensuring that adequate time and other resources are devoted to it
- ❖ To be driven by the libraries
- ❖ Ensuring that the needs and circumstances of clients are taken into consideration:
  - Computer facilities
  - Internet connectivity

- Seating for students
- Lecturers' preference of print over e-resources
- Availability of funds to procure and maintain e-resources
- Requirements for access by people with disability, e.g. by the partially-sighted.

## **Conclusion**

De-selection at TUT was a very complex process which took longer than expected. There was not enough time to plan for it. In hindsight, although information resources have been relocated, it has been a somewhat wasteful endeavour although the LIS tried to keep costs minimal. The process was not initiated by the LIS and it had to be done within time-frames outside the LIS' control. There was a lot that was not under the control of the LIS that made it difficult to meet deadlines. There are always lessons to be learnt from processes. The main one is that the LIS should initiate a de-selection project of its own that it can manage itself. After completion of the current project, the LIS will plan for proper de-selection. However, there were successes in that many print resources that did not meet criteria for remaining in the collections have been weeded and disposed of. Where replacement was necessary, electronic versions were selected as priority. The libraries have hybrid collections. With training and support from librarians, many lecturers are coming on board to order and utilise e-resources. Students have taken to utilising the e-resources. Plans are underway to review the strategy for e-resources. Strong hybrid collections have become a reality at TUT and they will continue to grow.

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