Disposal of documents: a proposal for libraries

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Abstract

In this article we develop a methodological approach for the task of discarding documents as well as indicators for evaluating the results of the procedure. Since library collections undergo continuous growth, whether by purchase, exchange or donation of material in diverse supports, the technical, operational and facilities of the organization must have great deal of flexibility. To provide shelf space for new items, existing material is often shifted to other spaces on the fly, a situation that highlights the need for the development

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of a collection policy that is responsive to the requirements of users, the library services provided and the objectives set for the development of a collection that is flexible, useful and up to date.

Keywords: Expurgation; Discard; Development collection; Collection development policy; Criteria for expurgation; Evaluation of the collection.

Resumen

Descarte de documentos: una propuesta metodológica para bibliotecas
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En este artículo se desarrolla una propuesta metodológica para abordar la tarea de descarte y se sugieren indicadores para evaluar los resultados del procedimiento, considerando que las colecciones en las unidades de información crecen permanentemente por la incorporación de bibliografía en diversos formatos y por diferentes medios (compra, canje y donación). Esto genera un importante movimiento, tanto de orden físico como de organización técnica y operativa; las dificultades que suelen presentarse con relación a los espacios se resuelven sobre la marcha y por lo general se requiere reacomodar y redistribuir el material que ya se encuentra en las estanterías para dar lugar a lo nuevo.

Se plantea también la necesidad de establecer una política de desarrollo de colecciones como una guía o marco que permita dar lineamientos para que la biblioteca pueda llevar adelante un desarrollo de colecciones acorde a los requerimientos de los usuarios y a los servicios que brinda, dando la movilidad necesaria para contar siempre con colecciones actualizadas y útiles al público.

Palabras clave: Expurgo; Descarte; Desarrollo de colecciones; Política de desarrollo de colecciones; Indicadores.

Introduction

The ongoing need to reorganize library collections in order to ensure conservation and access because of space considerations inevitably leads to the adoption of collection development policies that include both selection for inclusion and selection for discard. Such policies are important aids to libraries that receive additions to their collections, through donations, swaps and acquisitions throughout the year.

Donations demand special treatment because libraries often assume the duty to preserve such materials. On other occasions the library receives donations from individuals; and they must be free to dispose of such materials as they see fit. In contrast to purchases, these unplanned acquisitions bring with them issues of storage, technical processing and workload, especially where special care is required.

Library collections occupy all available space, though such space is often filled with superfluous, dated and largely unused materials, perhaps in poor condition as well. Such circumstances undermine the value of a documental collection. In order to develop an up-to-date, attractive collection with historical and artistic values that are useful to the user public is a considerable undertaking in terms of physical space, technical organization and the operations entailed in processing the documents and loading them to data bases.

The continuous growth in the numbers of documents requires any library to adopt policy guidelines to impose order on growth of the collection. The collection management policy and associated guidelines should clearly state the objectives and services provided and an explanation of its place within the library in terms of the duties it will discharge. The collection development or management policy should be studied and analyzed as a unit and it must inform each of work policies adopted. Any such policy must consider the selection of information sources, the means of acquisition, preservation and the eventual *discard* of unwanted materials. The question of discard is key to ensuring the dynamics of collection turnover and updating in a library. Varela (2000: 6. Translated from Spanish) has stated:

> Because the library is a dynamic organism in continuous growth, there are portions of the collection that fall into disuse, largely because of scientific obsolescence and consequent removal from school curricula. […] The need to discard material is the price we pay for space limitations and the advancement of human knowledge.

The literature in this field is not particularly abundant, with several recent papers discussing general experiences in diverse libraries faced with such issues. These papers describe the motivations, methodologies and results of discard policy in action. Such is the case of Parejo *et al.* (2011); while Muñoz Choclán (2000: 1. Translated from Spanish) states:

> The scant literature and concrete examples of discard policy in our country have can explain the interest spurred by the this paper which describes the Discard Plan for the Bibliographic Collection of the Sevilla Public Library, which has been accepted by those in charge as the library moves to new a new building.

Other publications, in contrast, cite the development of collections or the creation of collection development policies, including matters of discard. Generally, however, these papers do not present methodologies or theoretical approaches to such matters (Varela, 2000; Corchuelo Rodríguez *et al.*, 2012). The book *El expurgo en la biblioteca* (Gaudet and Lieber, 2000) and a somewhat older paper by Romero (1985) provide concrete, straightforward fundamentals of discard activities in libraries. Another interesting paper by Vall Casas (2006) provides a methodology specifically targeted to Catalan popular libraries, though the author take pains to suggest that it might be extended to other types of libraries.

Regarding correct terminology

The task of document discard can run into institutional resistance, arising perhaps from the memory of ill-conceived, indiscriminate expurgations as well as from internal politics and ideological infighting. Such things are not unknown in Argentina in recent times. Moreover, the book may be conceived of as "A perishable item, its paper subject to 'death' by being cut apart, mutilated, water-damaged or burned… In addition to these physical conditions, the content may also grow old." (Gaudet and Lieber, 2000: 17. Translated from Spanish). A discard policy must contemplate this circumstance and the fact that some documents never become discards because of the wealth of their content, the originality of format or prestige of the author, among other factors.

To discard is often used as a synonym of purge, a term that covers the gamut of actions from selection of material to be excluded from the collection or sent elsewhere. Notably, neither term has particularly positive con-

notations. Discarding is "the technical operation of critical assessment of the collection for the purpose of selecting materials, documents or titles for withdrawal" (Tejerina and Villarroel, n. d.: 2).

It may also be thought of as a negative, *a posteriori* selection (Gómez Hernández, 2002: 130), or inversely since it balances the collection as part of the selection process employed to incorporate material into the library. This negative selection rids the collection of dead weight, materials that are largely unused, useless and not part of the historical collection (Dobra, 1997). Librarians also speak of de-selection, relegation, rejection and withdrawal. All of these actions in varying ways refer to setting aside materials for the library collection in order to optimize the library's quality. The term to purge is idiomatically associated with to weed out, trim and the elimination of waste. In some sense it may be understood as purification or refinement of the collection.

To synthesize, discarding is the action of setting aside those materials that are no longer of use to users for diverse reasons. It is an action performed within the process of review of the collection for the purpose of making the collection more accessible, while improving its quality and adapting it to the changing needs of the user. It is also driven by the need to optimize space.

To carry out a purge safely and in line with a plan, a discard policy should be articulated and adopted as part of the overall policy of acquisitions and collection development, and in accord with space limitations, financial conditions and institutional climate. Moreover, this policy should state the criteria to be implemented and the final destination of the materials purged.

Using the IOUPI model

CREW (Continuous Review, Evaluation, and Weeding) known in France as IOUPI, is a practical manual for the critical review of collections. Published in French in 1986, it was originally targeted at small public libraries, but has since proven useful in other kinds of libraries. IOUPI is an acronym that brings together five criteria under which a given material may be discarded (Gaudet and Lieber, 1999):

I	Incorrect, containing false information
O	Ordinary, superficial or mediocre
U	Used, damaged or unattractive
P	Passé, obsolete.
I	Inadequate, doesn't belong to the collection

Methodological proposal

Inspired by the IOUPI approach, the methodology presented will serve as first filter, later to be followed by a close examination of the discard candidates by specialists. We have attempted to employ easily understood terminology for each of the criteria, even though it is not always easy for a librarian to know when material may be deemed incorrect, false, mediocre or inadequate, because such terms are no doubt subjective and may put personnel in difficult straits. Consequently, we have chosen to use most objective criteria to facilitate the activity.

By combining concrete, readily quantifiable criteria in each rubric, this proposal aims to facilitate the task of discard in libraries of all kinds, sizes and specializations. Moreover, each library can use the criteria it deems most pertinent to it needs. The proposal is not rigid. On the contrary, it attempts to be adaptable to the need of each library.

The IOUPI approach is limited to five criteria, something that might seem too narrow for larger libraries. Consequently, we propose eight negative criteria and one positive criterion, addressing the historical value of the material. Where historical value is found, the negative criteria are trumped and the material assessed is not purged, unless the library is not equipped for conservation or users are not interested in it. In such a case, the historically valuable material is donated to an institution that can preserve and make best use of it. The criteria consist of well-defined pairs that are conceptually related but can also be applied individually.

Negative Criteria	
O	Obsolete –Redundant in information
U	Unused-Duplicate
P	Not Pertinent-Poor quality
E	Physical Condition-Lack of space
Positive Criteria	
H	Historical value

The following is a brief definition of each criterion, divided into three kinds: objective, subjective and material. It should be stated that other interpretations of these criteria may exist.

Objective criteria

- *Obsolescence*: This often associated with content and format.
  - Obsolescence of content exists when the information contained is outdated and, consequently longer correct. Moreover, the material in question is without historical or research value. In university libraries, such material may be evaluated in terms of its relevance to academic or research programs. The date of publication, the material and type of monograph or book and the information contained may be taken into account.
  - Obsolescence of media support is invoked when the material requires special equipment for either reproduction or reading. When no such equipment is available, the feasibility of converting the material to another medium (for which there is equipment) should be considered.
- *Redundancy and availability* are determined by the coverage of information provided by other print and electronic media that are more up-to-date and otherwise more often used. The existence of copies of the material in other nearby libraries is also determined, especially when there are cooperative agreements in place.
- The criterion of *Use* serves to determine when a material falls out of use because of the changing interests of users. Moreover, any given material may never have been checked out or consulted. In this event, the reasons for its acquisition should be reviewed. In general terms, a material that has not been used in the first five years from its acquisition has about a 2.0% chance of ever being used. This qualifies the material for discard. The date of last use and the date of acquisition are the keys to this criterion.
- The criterion of *Duplicate* material is invoked when there are several tomes of the same title and edition. Distinct editions are considered different titles. The library determines how many copy it will keep on the shelves.

Subjective criteria

- *Pertinence* of content takes into accounts the relevance of the material to the curriculum and lines of research of the institution, while also

calling for assessment of datedness and obsolescence of the information. Some obsolescence may be reversed, as when cyclical fashions or trends come into play. Moreover, the historical value for future generations of an otherwise obsolete work must also be weighed

- *Quality of the information* is a sticky criteria, though such things as the author's prestige, the quality of the edition, the publishing house should be assessed in conjunction with experts.

Material criteria

- The criterion of *Space* includes matters of ease of access, and aesthetics and pragmatics of shelving arrangements. This criterion is also applicable to public access shelves. In general terms libraries should set aside space for materials to be acquired and added to the collection. This criterion should be applied in conjunction with other criteria, such as Obsolescence, Physical condition, etc.
- *Physical condition* examines supports materials that encumber proper use and in general terms detract from the aesthetics of the collection. Damaged material should be withdrawn from the open access shelves and any of the following options considered:
  – Withdraw the damaged material and replace it with a new copy when a newer edition is available, as cost considerations warrant, provided the material is in demand.
  – Implement conservation or restoration measures in order to make the damaged material available again, provided the cost of repair is lower than the cost of replacement, and/or no replacement is available in the market. In general terms, if the cost of rebinding is not more than one third of the price of purchase, rebinding is the best course.
  – Substitute the support material is a viable option whenever both cost and ensuring accessibility are duly considered. Purchase of substitution materials should never amount to more than 10-15% of the budget allocated to the area of knowledge.
- *Historical value* is closely linked to the type of library in question. This criterion involves both the cultural and monetary values of the material in question, in accord with Article Two of the National Law of Argentina 25197:

> ARTICLE TWO. For the purposes and effects of this law, "cultural assets" shall be understood as all those objects, artifacts and sites that constitute

the expression or testimony of human creation and the evolution of nature and that have exception archeological, historical, artistic, scientific or technical value. The universe of these assets shall constitute the cultural heritage of Argentina. "Cultural-historical-artistic assets" shall be understood as all those works of man and nature that are irreplaceable, whose uniqueness, unity, rarity and/or antiquity affords them exceptional universal of national value from the historical, ethnological or anthropological standpoint, including architectural works, sculpture and painting, and archeological artifacts.

Consequently, anything falling in any of the following categories shall be deemed a "cultural-historical-artistic asset":

1. The products of explorations, archeological and paleontological digs, whether performed on land or under water.
2. Those objects such as instruments of all kinds, pottery, engravings, coins, seals, jewels, weapons and funerary items.
3. Pieces proceeding from the dismemberment of historical monuments.
4. Materials of anthropological or ethnological interest.
5. Assets that refer to history, including the history of science and trades, and social, political, cultural and military history, as well as to the life of peoples and the national leaders, thinkers, scientists and artists.
6. The buildings comprising the architectural heritage of the Nation.
7. Assets holding artistic values, such as:
   -Paintings and drawings executed on any type of support and using any kind of media.
   -Etchings, stamps, lithographs, original silk screen prints, posters and photographs.
   -Artistic assemblages and installation in any media.
   -Artwork and crafts.
   -Statues.
   -Rare manuscripts and incunables, codices, books, documents and publications of special interest, whether separate or in collected.
   -Object of numismatic and philatelic interest.
   -Archive documents, including collections of texts, maps and other materials, cartographic materials, photographs, motion picture films, videos, sound recordings and the like.
   -Furnishings, musical instruments, tapestries, rugs and costumes.

The aforementioned criteria may be adjusted to each kind of documental material in libraries (books, magazines, videos, slides, maps, CDs, DVDs pamphlets, etc.). The following is the form used to apply the method:

Unique internal document identifier (inventory, bar code, ISBN, etc.)		Maximum score	Score attained
O	Obsolete –Redundant in information	2 points	
U	Unused-Duplicate	2 points	
P	Not Pertinent-Poor quality	2 points	
E	Physical Condition-Lack of space	2 points	
TOTAL			
H	Historical value		
Party in Charge			

Destination:	Internal relegation:	Restoration:	Sale:
Donation:	External relegation:	Destruction:	
Hist. collection:	Other support:	Swap:	

A form is used for each document. The first part of the form is used to record the score for each of the five criteria. The first four criteria are assigned two points, so that if a single criterion of the pair is deemed to exist one point is awarded, and when both are deemed to exist two points are scored. The historical value criterion is not scored. It is simply checked, which means the document assessed will not be purged, but rather donated to an institution better equipped to give it proper handling. Each library shall set the point threshold needed for a document to be considered for discard or further analysis.

The second part of the form is used to indicate the destination of the material under assessment. The diverse destination may be color coded or a letter code may be used so that such materials can be more easily assigned to shelves or storage boxes. A third part may be added for documents that have numerous tomes, such as duplicate copies of magazines, diskettes, slides and other such materials.

To summarize, the steps in the process are followed:

1. Before beginning the process one should analyze the viability of the discard action and ascertain whether there is a discard policy in place, become familiar with the respective legal framework, and determine the availability human economic and human resources (Vall Casas, 2006: 4).
2. Designate personnel. This kind of job is best performed in teams, with each team assigned to a sector, subject area or document type.

At least one person on each team should have a good knowledge of the collection and the needs of users.

3. Set the dates for launching and concluding the task. The purge process can take a significant length of time. As such, it may be best to carry out the task by sectors; for example, focusing only on magazines or a classification range or certain supports, etc.

4. To facilitate the task, one must take care that the sectors to be purged are in order. The sector may be immobilized for the term of the purge process, provided this kind of interference with lending services does no inconvenience users.

5. Ensure availability of the space and furnishings to hold purged materials, including shelves, carts, ladders, boxes, tables, etc.

6. Prepare a sufficient number of forms, markers and colors for identifying the destination of the purged material.

7. Compile a topographic list of documents that have not been used in recent years, setting the cutoff period in accord with the library's objective so that it can serve as a guide for the materials to be analyzed in the first place.

8. Begin the review task shelf by shelf, pulling documents that appear on the list (*Use* criterion), while also applying other criteria, and marking the document destination and placing the material in the assigned place. Likewise, the state of preservation of the materials not on the list should be scrutinized and the repair needs assessed.

9. Perform a count by destination of the material withdrawn.

10. Before definitively withdrawing material, one may consult specialized bibliographies or specialists in order to make a final decision regarding its removal.

11. The library requests authorization before the competent authority to discard material before taking further action.

12. Once the destination of the materials is decided and authorization is secured, the definitively purged materials are scrubbed from the systems. Lists of the purged materials, donated documents or transferred assets should be complied. These lists may be used by librarians to carry out purges and modify the collection development policies at a future date. A record must be kept in the system regarding the reasons for the purge, as well as of relevant statistical information and results.

13. Performance evaluation of the purge operation, quantifying results and qualifying the task itself in order to determine if the approach used was satisfactory or whether it should be modified.

Both the procedure and the results of the purge should be evaluated so that corrective or preventive measures can be implemented in futures actions. In terms of finding the best time of year and the most able personnel for making the decisions required in the purge task, evaluation of the procedure is key to optimizing the process in the future.

The evaluation of results will yield important data for taking subsequent action, including information needed to optimize selection and acquisition policies, setting deterioration-repair rates, organizing preservation campaigns, determining collection mobility, delineating promotion and/or dissemination plans for parts of the collection, setting the cost of the purge and many other actions. Moreover, this analysis will serve to evaluate the collection in terms of least and most used sectors, detection of lacuna and determination of growth rate, etc.

Data collection and the application of quantitative indicators is an objective method for evaluating the results of the purge operation. It is also important to make a qualitative assessment of the collection that survives the purge.

INDICATORS

The indicators are a numerical, verbal or symbolic expression used to measure and evaluate the quality of products, services or processes. The typologies of the indicators depend on the data gathering technique; in general terms they may be both qualitative and quantitative; even though they may be classified in accord with other criteria, such as entry indicators, egress indicators, and indicators of efficiency, efficacy, performance, and impact, etc. Moreover, they serve to assess to what degree objectives are achieved. In accord with ISO 11620, we list the criteria to be used for testing or developing an indicator:

When testing a performance indicator, the following criteria shall be used:
a) Informative content. The content of the indicator must convey clarifying information in order to be a useful instrument for measuring an activity, identifying achievements attained, and locating problems and deficiencies and, consequently,

implement remedies. It should provide information to support decisions making, such as setting or allocating budgets, setting priorities with regard to services and activities, etc.

b) Reliability. A performance indicator must be reliable, producing the same result when used repeatedly under the same conditions.

NOTE: The fact that an indicator reflects implicit variability of the data, such as seasonal variations or fluctuation in lending activity, does not mean the indicator is unreliable.

c) Validity. The indicator must be valid, genuinely measuring what it purports to measure.

NOTE: The fact that some indicators are indirect indicators, does not mean they are invalid.

d) Suitability. The indicator must be matched to the stated objective. The units and scale must be suitable and the operations needed to implement the measuring process must be compatible with the habitual procedures of the library and its installations, etc.

e) Practicality. The indicator must be practical, in the sense that it relies on data that is reasonably accessible in terms of time, the capacity of personnel, operational costs and the forbearance of users who may be inconvenienced. If the indicator is used to compare libraries, the following criterion (f) must be applied.

f) Comparability. A library performance indicator allows comparison of libraries when the same result, after adjusting for measurement error, means that the level of quality of the services or efficiency of the libraries compared is the same (See also 5.3.5).

NOTES:

1) It is important to ensure that all activities measured are comparable.

2) This criterion is sufficient for ranking libraries in accord with the result of the performance indicator, but it is not sufficient for determining, for example, that a library earning twice the score is twice as good as another.

To ensure the efficiency of data collection and that data are collected in a timely way, the indicators shall be established beforehand, determining the object sought by each one. The following are some proposal for applicable indicators:

- *Name of indicator:* Elimination percentage
  Objective: To know the percentage of materials discarded versus the entire collection.
  Scope: This indicator can be applied to the totality of the discarded documents and can also discriminate between the document type, support, subject areas, etc.

Definition of the indicator: Once the purge is concluded a list of the entire collection is compiled.

Method: The calculation to be made is as follows: (B*100)/A, where:

    A = the total material discarded, and

    B = total collection.

Interpretation and factors that affect the indicator: A high purge percentage may indicate the existence of a collection that is not matched to the type of library. This may have come about because of several reasons, including the existence of very old and deteriorated materials and lack of proper promotion of the collection. Sometimes an area of knowledge falls into disuse for one reason or another; for example, when there are changes in the curricula offered in a university or school that depend on a library. It may also indicate that the purge was not performed with the proper care or that it was done by unqualified persons. In this case, the objectives of the purge become very important, because they go hand in hand with the type and volume of purge desired.

Data sources: Results of the purge and size of the collection.

Associated indicators: Size of the collection and volumes per user.

- *Name of indicator:* Ratio of entries to discards.

  Objective: To measure the relationship between the documents coming into the collection and those discarded.

  Scope: This indicator accounts for the materials entering in the years, or since the last purge, and the material discarded.

  Definition of indicator: It is calculated after the conclusion of the procedure. It may refer to each type of material or to the totality of materials and supports included in the discard.

  Method: A-B, where:

      A = the total of materials entering the collection since the last discard, and

      B = the total of materials discarded.

  Interpretation and factors that affect the indicator: Once again the objectives of the policy must be in alignment with results yielded by this indicator. In any case, a positive number, that is, more entries than discards, indicates an increase in the volume and the quality of information of the collection. In contrast, a negative number, i.e., more discards than acquisitions, may indicate quantitative impoverishment of the collection.

Data sources: Record of inventories and results of the purge.
Associated indicators: Collection growth index.

• *Name of indicator:* Time elapsed in the process of document discard.
Objective: To assess the degree of efficiency of the complete discard procedure.
Scope: This may be applied to any type of library.
Definition of the indicator: The number of days from the beginning of the procedure to its conclusion.
Method:
  1. The user of the indicator shall set a period of time used for the measurement (for example, one month), and shall collect data on the books considered for discard and shall keep a log using the library's data systems or a record slip that is affixed to the book as it moves through the process.
  2. For each title, the user records the exact date for each stage of the process:
      a) evaluation of physical condition;
      b) verification of use frequency;
      c) evaluation of relevance of content;
      d) evaluation of author prestige;
      e) evaluation of change to alternate support, etc.
  3. For each title, the librarian calculates the number of days between the beginning of the analysis process and the final decision regarding the document. These titles are then ranked as per the number of days elapsed. The median technical processing time is the number days needed to process the title. This value stands at the middle point of the distributed ranking.
     Note: Documents that have not been fully processed are not included in the calculation, because a final date cannot be assigned to an incomplete process.
     If the number of titles is an even number, the median processing time of the purge shall be A+B / 2, where A and B are the two values standing at the mid-point of the distributed ranking. This value is rounded to the nearest whole number of days, as warranted. The median time of each stage of the process can be calculated in the same way.

Interpretation and factors that affect the indicator: The indicator is a whole number without an upper cap. When all data from all stages of the process are gathered, the indicator may suggest the process has

taken too long or that there were delays caused by work backups or excess workload. Management decisions regarding, for example, allocation of human resources may be taken on the basis of these results.
Associated indicators: Cost of purge, Cost per title discarded.
Source: This indicator is developed on the basis of the "Median time of document processing" under ISO 11620.

- *Name of indicator:* Cost per volume discarded.
  Objective: To assess the cost of the purge procedure.
  Scope: The indicator may be applied to diverse types of documents.
  Definition of the indicator: The cost analysis for the discard of a document and its logical and coherent correction in the catalogue.
  Method: The user of this indicator shall determine the measurement period. The data shall be gathered during the sample period.
  The cost per title purged is (A x B) / C, where:
  A = the total number of hours during the sample period devoted to performing the discard procedure and analysis;
  B = the cost per hour of work (salaries and social security during the sample period, divided by the work schedule of the personnel involved, conventionally understood as being on site), and
  C = the number of titles purged during the sample period.
  Note: Buildings, operations, etc. are specifically excluded in the calculation of this indicator.
  Interpretation and factors that affect the indicator: The costs can be valued in relation to the expected quality of the collection after the purge and the time employed with regard to the expected benefit.
  Source: This indicator has been developed on the basis of the indicator "Cost per title catalogued" under ISO 11620.

- *Name of indicator:* Cost of discard.
  Objective: To assess the investment made versus expected benefits.
  Scope: This may be applied to any discard procedure in any type of library.
  Definition of indicator: The total cost of the procedure is calculated, in view of the cost per title purged plus the investment made, such as purchases of proper furnishings, construction, purchase or rent of a building for storage, library supplies, cost of printing forms, purchase of packing materials for internal and external storage, shipping costs of materials to be donated, etc.

Method: The calculation to be made is as follows: $(A \times B) + C$, where
    A = the number for the volume purged;
    B = the cost per volume purged, and
    C = the total outlay made.

Interpretation and factors that affect the indicator: The cost is higher when investment is higher, which must be valued in terms of the expected benefits. To erect a building to store materials can greatly increase the cost of the purge, but the additional space may also bring considerable benefits to users and the library itself, which would then have room to devote to study cubicles, grow the collection and install new equipment. The cost is prorated over the course of subsequent purges.

To apply the suggested indicators, the following data must be considered:

- Number of damaged works
- Number of lost works
- Number of obsolete works
- Number of replaced works
- Number work moved to alternative support
- Number work held in deposit (static)
- Number of swapped works
- Number of works derived from other libraries
- Number of destroyed works
- Number of works sold off
- Number of work repaired in-house or by third party

Most of these data can be recorded in the purge form already shown, which can be modified to the needs and objective of each library. Other data shall be collected on the discard task and control of the same.

The qualitative evaluation of the complete purge process may be performed by the personnel involved by means of the questionnaire or in a meeting of personnel in which participants express the positive and negative aspects of the process and suggest changes to the methodology. An additional assessment arising from the use of the collection may be performed by means of analyzing the turnover rate of the materials and the quality of the available collection, among other aspects.

Conclusion

The discard activity requires technical, intellectual and operational expertise and serves to help libraries optimize space and preserve collections, whereby user needs are better served. The task should be carefully planned in accord with clear guidelines expressed in a discard policy, which must be a part of the overall collection development policy adopted by the institution.

The successful performance of a discard operation requires duly trained personnel, a pre-planned site for receiving the discarded material and evaluation procedures for both the actions and the final results. If the planning and development are not properly executed, the purge process could yield poor results to the detriment of the institution's prestige. To ensure its orderly progress, the discard activity must be supported by a detailed procedural manual and the use of careful record keeping so that qualitative and quantitative indicators can be duly developed with regard to results.

The literature cited herein points out on numerous occasions just how controversial a book purge can be, in large part because it may seem to contradict the library's historical mission of safeguarding and preserving works of knowledge (Romero, 1985: 94). According to Romero, this is a psychological barrier among librarians who find it difficult to discard even never-used work. Moreover, discard processes often unveil errors in acquisition selection (Vall Casas, 2006: 2). If one evades the need to discard, the library collection will be doomed to aging into obsolescence, undermining its overall ability to stay abreast of scientific progress and user demands.

The methodology proposed herein is practical and straightforward. It produces clear, detailed records of the criteria applied and the materials to be discarded. Moreover, this information produces useful indicators and a record of the documents donated to other institutions.

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