LETTING GO of LEGACY SERVICES
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Ice Cream

IT ALL BEGAN, as many good things do, with ice cream. The authors met while attending an ice cream social at a library consortium event at Penn State University. We bonded over our mutual love of creamery goodness, and began to talk about new technologies, allocating budgets, management, and decision making in our respective liberal arts colleges. It didn’t take long to realize that our issues were shared, and that our struggles might be easier if we pooled resources. While we were discussing the need to stop doing things that seemed redundant or counterintuitive, we made the intuitive choice to sit down and have a second helping of ice cream. We started comparing notes on services, priorities, and management philosophies, quickly realizing that working at very similar institutions would give us the opportunity to share information and evidence gathering techniques as we critically examined services in our individual libraries. Our campus and library cultures were somewhat different, but we recognized that our similarities meant we could work together to make the process easier. In our initial conversations, we may not have been using the words “planned abandonment” or even have thought about a framework for decision making, but over time, we quickly discovered that an ideal of organized, systematic analysis of service was an important tool when contemplating innovative change in our organizations. So when we returned to our own institutions we started to read, think, and gather evidence.
While ice cream may have brought us together, our shared western Pennsylvania roots and our history in the Girl Scouts brought us to read Frances Hesselbein on management. Hesselbein, a native of Katherine’s hometown of Johnstown, Pennsylvania, was the CEO of the Girl Scouts of America and a protégée of Peter Drucker. In her writings she challenges leaders to identify and discard what no longer works to ensure that services and organizations are relevant for the future. Hesselbein credits the concept of planned abandonment to Peter Drucker, and reading Drucker gave us a framework to more fully understand the theory of planned abandonment.

**Planned Abandonment**

Planned abandonment means examining and possibly ending the services that brought a library success in the past and, instead, continually establishing new means of being relevant to our patrons and communities. Those of us who have worked in libraries for any length of time know that as a breed, library workers often propose and add new services, but don’t always critically examine existing realities in light of our missions, and rarely let go of obsolete or less useful programs. It’s terribly difficult, if not impossible, to innovate in big or important ways if you also have to keep doing everything you’ve always done. In a 2003 interview, Drucker stressed that innovation isn’t “something one can add to a static organization.” He went on to state that the “first requirement” of being an innovative organization is to embrace “organized systematic abandonment.” Drucker and Hesselbein agree on the need for examination, for action, for addressing “what we do now” if services or products no longer make sense. While the subject of planned abandonment might have particular relevance during an economic downturn, examining services should be a regular part of organizational assessment and decision making.

Let’s get one thing clear at the beginning of this book. We’re not arguing that librarians don’t change. We know for a fact that we do—we’re innovating and changing all the time. The library world has been revolutionized several times over in the past few decades. Librarians are really, really good at change. But we aren’t always good at valuing what we do, and we don’t always manage change in a way that mitigates the possibility of a Nicholson Baker-type blowback.

This also isn’t a book full of management techniques. Librarians are rightly skeptical of delving too far into the business and management literature for inspiration. Following every trendy management idea is a bad idea for busi-
nesses, let alone libraries. We’re not going to move your cheese, or compel you to fling fish or annoy you with acronyms. There are no Sigmas here. We are going to challenge you to accept that at the core of Drucker’s ideas about abandonment are concepts that librarians hold dear: critical thinking, analysis, and assessment. Questioning our beliefs, our practices, and the things we’ve held sacred is healthy and necessary in order to reflect on what we value and the future of our profession. Letting go of things that no longer bring value to your organization is also a sane and compassionate response to a profession that needs to be able to respond to change with wisdom. We cannot do it all, nor should we try.

Jack Welch of GE famously used Drucker’s planned abandonment strategies when he took over the company. After asking the question “if you were not already in this business, would you enter it today, knowing what you know?” Welch sold off GE’s small appliance division and then, after that proved to be a correct move, sold off the consumer electronics division a few years later. Welch argued that freeing up the resources that had been invested in these legacy products allowed GE to focus on its strengths (high-technology business, like medical equipment and airplane parts) and core services such as lighting.

Drucker himself used General Motors as an example of a company that failed to use planned abandonment concepts when it created the Saturn automobile line. Saturn’s assembly line worker participation culture and unique customer service focus were departures from staid Detroit industry standards. Initially the car line was a success, but GM failed to abandon its old lines such as Oldsmobile and truly commit to the radically different Saturn practices. As a result, too few resources were devoted to too many GM product lines—and the last Saturn rolled off the assembly lines in 2009.

For another example, some Girl Scout Councils used planned abandonment strategies in 2011 to discover that the top five varieties of Girl Scout cookies make up 77 percent of cookie sales, and cut other cookie lines accordingly. The so-called “Super Six pilot program” was a teachable moment for the organization, and an opportunity to see if a streamlined product line, combined with increased training, resulted in operating efficiencies, increased sales, and customer satisfaction. So if you miss the Dulce de Leche cookie, you can blame planned abandonment strategies for its absence.

Unfortunately, human nature works against planned abandonment principles. We like doing what we know, and when you’re in the midst of fulfilling work, and hearing feedback from enthusiastic supporters, it is difficult
to understand the need for change. As the Girl Scouts learned, some people really like underperforming cookies, and have a hard time letting go. Librarians recognize that ending services can be especially hard. Stoffle, Leeder, and Sykes-Casavant state in their article, “Bridging the Gap: Wherever you are, the Library,” “This is a difficult challenge for librarians, as we typically hesitate to end a service even if there is one person in our entire community who uses it.”

This is where planned abandonment can help.

Through the use of planned abandonment strategies grounded in assessment-based decision making, our organizations can consciously focus on what we can and must do well, and start the process of choosing what services to let go. This book’s case studies and interviews reveal that the process must be context-sensitive and requires careful communication and follow-through from all levels of library management. Of course, federal, state, and local laws, as well as institutional policies, have to be kept in mind when evaluating services—but services must be evaluated.

And So . . .

Once we understood the concept of planned abandonment, we decided to put the theory into practice in our own libraries. We conducted a literature review, and found that while libraries might be abandoning things, very few libraries were using the term “planned abandonment.” While as far back as 1994, articles mention Drucker’s ideas and their possible application to libraries, we found no case studies on the abandonment of a legacy service. So we decided to create our own in-house study of interlibrary loan practices. We worked together, framed questions, analyzed data, and ultimately decided to end a once-popular interlibrary borrowing program. The resulting paper was presented at an ACRL conference in 2011, and sparked interest and debate.

Librarians embraced the overarching principles of planned abandonment. We’ve presented online and at conferences, and the more we interacted with colleagues, the more we learned about the many reasons why librarians do not adopt planned abandonment. Most of these reasons are based on assumptions, emotional responses, and a general discomfort with getting rid of anything. One academic librarian who writes on these issues is Donald Gilstrap, dean of University Libraries at Wichita State. Gilstrap proposes that although maintaining old and new ways of doing things may allow libraries to avoid facing the anxiety of “endings,” not adopting planned abandonment may heighten these anxieties by not allowing the librarians to create “new beginnings” with
less confusion and not as much stress from maintaining too many services and systems.4 Librarians are often comfortable with adding new services but are much less comfortable with taking anything away. But Gilstrap’s study seems at odds with the fact that as a profession we have radically adapted the way library services are accessed and delivered over the past twenty years.

Why Case Studies?
Once we stepped back and looked at what we had already accomplished, we realized that choosing to work together as we developed our questions, collected our data, and framed our solutions was the most important support in analyzing our own libraries’ services and practices. Working together helped us to reach conclusions faster than if we were working alone. This is why we then decided to reach out to others in writing this book, and ask for experienced librarians at a variety of libraries to write case studies as a means to explore the broader topic of how we can face the future.

We chose to use case studies because they are an effective tool for deep thought and analysis, offering a real-life glimpse of how one library dealt with a difficult issue. Through the careful analysis of case studies, readers can gain insight into how their colleagues have grappled with choices to abandon—or in some cases, to keep and alter services. We asked the authors of the studies to be candid, to share their data analysis techniques and their decision-making frameworks.

These case studies are not prescriptive; they are lenses through which we can examine a service and to illustrate trends and decision-making methods. You won’t be able to copy an approach because your situation, management structure, budget, and personnel will vary greatly from those in the case studies. But each case study will show how librarians grounded their decision making in their own institutional values and provide insight and inspiration to you as you grapple with your own challenges.

Why Interviews?
As we were reviewing the case studies and studying the concepts of planned abandonment, we quickly identified pressure points common across many different libraries. These pressure points included difficulties in dealing with data, in communicating to internal and external populations, and in the constant stress of just working together in organizations. We interviewed librarians to find commonsense solutions for dealing with these issues.
Let's Go
This book is not telling you that you have to change. This book provides an approach to something that will never go away: the future. Through examining the case studies and carefully reading the interviews, you can develop a framework to start to think about what is vitally important for your library’s future. You will discover ways to identify services, activities, and practices that can be let go, freeing you to focus on valuable, mission-critical work.

Just remember: It’s all easier with ice cream and friends.

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SOMETIMES WE GET so emotionally attached to a service or an idea that sheer nostalgia makes it difficult to abandon it for something new. This is when the Adrien Brody Rule can come into play. You see, Adrien Brody was to be the star of the Terrence Malick film *The Thin Red Line*. Brody’s character is the main protagonist in the source material, a novel by James Jones. Brody endured boot camp and spent six months of his life filming under grueling conditions, with every impression that he was the star of the show. And then the editing began. As the director shaped the film, more and more of Brody’s character ended up on the cutting room floor, until his lead role as Corporal Fife morphed into a minor supporting character.

According to an editorial in *Fast Company* magazine, the point of the Adrien Brody Rule is that “you can’t make decisions based on initial assumptions or the amount of resources extended, but solely on what best meets the needs of the situation.” Terrence Malick’s telling of *The Thin Red Line* didn’t need Adrien Brody. Adrien Brody might have been cast as the star, worked very hard at his role, but in the end he wasn’t really needed. Librarians at Lafayette College put the Adrien Brody Rule into practice when they evaluated their periodical subscriptions. They discovered that their historical reliance on print periodical subscriptions and a faculty-based selection process was no longer the best way to meet the needs of their community. The journals hit the cutting room floor, and pay-per-view access became the star.

Case Study 1  |  Lafayette College

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Case Study 1: Lafayette College

Cutting Costs, Increasing Access
Pay-Per-View Periodicals at Lafayette College Libraries

Michael Hanson and Terese Heidenwolf

LAFAYETTE COLLEGE, AN undergraduate private liberal arts and engineering school in Easton, Pennsylvania, serves a population of 2,400 students and 200 faculty members. With a strong curricular emphasis on science and engineering, Lafayette libraries have traditionally spent heavily in STEM periodical titles.

Lafayette libraries’ strategy for providing users with access to serials underwent an important modification in 2008, when we cut subscriptions to all of our Elsevier journals and switched to pay-per-view access. For the previous decade we had been struggling with the challenges presented by the migration of serials literature from print to electronic format coupled with the inflation of serials prices and stagnant library budgets. As serials costs inflated, we were twice required to implement a series of cuts, during which departments were asked to reduce their subscription list by a certain dollar amount. Despite the necessity of cuts, faculty continued to request new journal subscriptions, particularly costly STEM titles. Elsevier published some of the most requested titles, but because of the amount we were already spending on subscriptions to Elsevier journals, the publisher was unwilling to offer us their “small school discount” to the suite of journals in ScienceDirect.

With this option closed to us and with a stagnant budget making more serials cuts imminent, we began to explore pay-per-view options, which seemed to offer a way to provide users with access to more of the content they were asking for. We couldn’t afford to maintain our print subscriptions while also offering pay-per-view access to non-subscribed titles, so we began to consider cutting subscriptions to all of our Elsevier serials. While there was little doubt that faculty and students would be pleased by increased access provided via pay-per-view, we were concerned that the logistics might be a stumbling block for users, that the costs would be unpredictable, and that we would no longer be building a permanent archive of journals, either in print or electronically.
Although the unpredictability of the costs at first seemed disconcerting, when we started doing calculations, we quickly realized that it was reasonable to assume that the money saved by canceling Elsevier subscriptions would more than cover pay-per-view demand for a year. With a fee of $30 per article, our user population of 200 faculty and 2,400 students would have to access well over 5,000 articles in a year to exceed what we were spending on Elsevier subscriptions. We still felt a bit queasy knowing that we would no longer be purchasing permanent access to these journals, but consoled ourselves with the thought that given the ready availability of electronic archives, we could purchase permanent access to some titles down the line if pay-per-view stopped meeting our needs.

So, in early 2008, we tested the waters by conducting a trial for faculty in biology and geology. For one semester we provided them with immediate, unlimited access to nearly all of Elsevier’s titles, with the library paying the entire bill. When we saw that the trial had gone smoothly, we began talking with faculty about canceling our Elsevier subscriptions and relying entirely on pay-per-view access. After getting preliminary endorsement from the Library Advisory Committee, which consisted of three faculty members and two students, we held a meeting with faculty collection coordinators, where we presented them with our plan and provided a list of the titles that would be cut. Although a few of them were initially concerned about the high cost per article, they were quickly convinced that it was reasonable given how much we were already paying for a small number of subscriptions, and they expressed no other reservations.

We were then left to work out the logistics of providing access. After consulting with colleagues at a few similar institutions that had migrated to pay-per-view, we decided to provide all faculty with unlimited, unmediated access through our established OpenURL link resolver, rather than allocating certain pools of money for individual departments to spend. Faculty enjoy convenient click-through access to article PDFs. To control the costs of the program, student access was mediated via an online interface that forwarded an e-mail request to a staff member. The staff member would either e-mail the requested article to the student (within two hours during regular reference hours) or, if the article was available in the print collection, direct the student to the paper copy. This modest requesting “hurdle” increased the probability that a student genuinely wanted the article and decreased the casual downloading that could
inflate the cost of the program. Information about each title available was included in the library catalog and coverage information was added to our OpenURL resolver’s knowledge base.

By January 2009, all of our policies and procedures were in place, and faculty and students were able to access nearly all articles available from Elsevier. We posted news of the change on our website and informed faculty via an e-mail message and an article in the library newsletter. We did no special promotion to students, but they quickly discovered the availability of the materials when they used our databases and OpenURL resolver.

Simultaneously we cancelled 77 Elsevier subscriptions, for which we had been paying $162,662. (The following year, we cancelled our twenty-one Elsevier standing orders.) In that first year of pay-per-view, faculty and students accessed 2,147 articles at a newly negotiated price of $22 each for a total cost of $47,234. It would be nice to say that with the savings of over $115,000 we were able to purchase additional materials, but in fact, this savings merely allowed us to keep our serials budget balanced and gave us some breathing room for the coming year, when our budget allocations were fairly stagnant. It is not insignificant that our interlibrary loan use statistics and costs were decreasing in lockstep with our pay-per-view access.

The increased access to Elsevier titles was so appreciated by our users and was so easy for us to manage, that the following year we implemented pay-per-view for Wiley articles and will likely make the change with additional publishers. The increased Wiley access was greeted with nearly as much enthusiasm as the Elsevier access had been, and we received many notes of thanks from faculty, including one exuberant (if slightly alarming) message that read, “Woo hoo!!!! Picture me lighting my hair on fire and running around my office right now!”

With the implementation of pay-per-view access, we also saw an opportunity to evaluate our serials selection and review processes, which unexpectedly led to another modification in our practices. For many years, in order to collect serials materials that best fit faculty and student needs, each academic department reviewed a list of current subscriptions in support of their discipline. If faculty felt the titles didn’t meet their needs, they then could request different or additional titles, which the library tried to accommodate within the limits of our budget and competing requests. Since faculty were reviewing serials lists annually and had recently been forced to winnow them, we had felt fairly confident that the titles we subscribed to were of high importance to our faculty’s research and instruction and, by extension, to their students’ needs. Now that our faculty and students had access to nearly all Elsevier
titles, we could collect use data to test this assumption. After a year of this program, an examination of the data showed that the subscription lists were not accurate predictors of the journals faculty and students used when given access to the full complement of Elsevier titles, and we began to reevaluate the primacy that we had given to faculty opinions in the serials selection process.

Library literature is replete with examinations comparing patron-driven selection to collection developers’ selections. Most conclude that selectors’ choices do not predict users’ choices and that broad access, generally satisfied by publisher Big Deal packages, best meets user demand. Considering these studies, perhaps we shouldn’t have been surprised that our selected titles didn’t better match those with high pay-per-view use. We had thought that giving faculty voices priority in the selection process as well as monitoring interlibrary loan requests created a process that captured some nuances that might have made our selection results more useful for our user community.

When we examined data from 2009, our first year of Elsevier pay-per-view access, we found that articles from twenty-seven titles were downloaded more than ten times and accounted for nearly 30 percent of all use. Of these, eight had been on our subscription list, three we had considered subscribing to, and four were at least familiar because they were requested fairly frequently via interlibrary loan. But twelve of these high-use titles weren’t even on our radar screen. We had had no faculty requests to purchase them in recent years and none of them were requested more than ten times via interlibrary loan in 2008. (In fact, most had fewer than five requests.)

We continued to monitor our use data and noticed patterns from year to year. In 2009, for example, 32 of the 98 titles we had previously subscribed to were not used at all; in 2011, 43 of these 98 titles were not used. In more than three years of pay-per-view access, 21 of the 98 titles we had subscribed to were never used, even when we took into account those requests for which we referred students to paper copies in our collection.

It is reasonable to assume that subscription selections would have shifted some since 2008 to meet new information demands. Still, the data do suggest that we gave the faculty more credit than we should have for being able to predict which journals would meet their needs. Perhaps the information environment is now so extensive and patrons’ needs so diffuse, even among a user population as small as ours, that such predictions are nearly futile.

We still have individual subscriptions to thousands of periodicals and still consult annually with faculty about these subscription lists, but given the lessons we learned from our Elsevier data, we are now much more likely to let
use data drive our decisions about which titles to retain and which to cut. Use statistics accompany the review lists sent to each department, and titles that have low use are highlighted with a request for the department to discuss their usefulness and consider replacing them with other titles. Titles that show low use over an extended period of time are cut by the library even if faculty have not identified them for cancellation.

Fortunately, unpredictability in the titles used via pay-per-view doesn’t translate into unpredictable budget patterns. Over our several years of experience, overall demand has remained fairly stable from year to year and follows a pattern tied to the academic year. When classes are in session, student use is higher than faculty use and peaks during mid-semester and in the weeks just before the end of the semester. Faculty use increases when teaching loads are light, mostly in the summer months and during breaks, and then abates at the same times student use increases.

Although we are acutely aware that we are forsaking traditional library practice by not having a paper or licensed archival copy of Elsevier and Wiley journals, we think that the benefits realized in providing readier, wider, and cheaper access to these scholarly journals merit forsaking this practice. Abandoning so many of our serials subscriptions felt a bit like jumping off a cliff, but we’re glad that we took the plunge—and our users are as well.

**LAFAYETTE’S CASE STUDY** is a clear example of the Adrien Brody Rule in action. They made decisions based on what best met the needs of their current situation, casting aside nostalgia and historic investments in print collections. This is clearly an example that won’t work for all types of libraries; research libraries with a preservation mandate might find the prospect impossible, impractical, and downright wrong. Nevertheless, the model of decision making based on values, patron service, cost, and use patterns is exactly the kind
of thing all libraries can emulate. Abandoning nostalgia and critically examining past practice allowed librarians at Lafayette to rely more on data-driven decision making and planned abandonment practices.

Librarians in the profession long enough to remember Nicholson Baker realize that communication and planning are the keys to making something like Lafayette’s pay-per-view service work. In his 2001 book Double Fold: Libraries and the Assault on Paper, Nicholson Baker accused librarians of destroying our common cultural heritage by discarding original journals and other materials after microfilming them, and characterized microformats as cumbersome barriers to scholarship and research. Baker’s writings about library and archival practices ignited a firestorm in the profession. As Richard Cox, author of Vandals in the Stacks? A Response to Nicholson Baker’s Assault on Libraries, stated, “Perhaps it will take such a rant from outside of our community to wake us up about what and how we need to communicate.”

Lafayette succeeded in their plan because they consulted stakeholders and clearly communicated the process, rationale, and benefits of the changed service along the way.

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