Collection managers will review materials in their subject fields for storage designations—SRLF, Local Annex, and discard—as a single review process. This will be an ongoing process, and will be rotated amongst collection managers and areas of the library to reduce keep the individual workload manageable.

Collection managers will be asked to review manageable sections of their collections at a time so that they are not overburdened, and so that the flags in the library will be scattered and not look so daunting.

The overall approach is not to strive for perfection. Even though the process will not identify every possible title, it should be possible to identify a high enough percentage to keep the process moving and to identify titles quickly enough to keep up with the SRLF shipment requirements. Books missed each round will be considered the next time that call number area will be reviewed.

Lists will be generated by ALEPH and won’t be perfect, so some titles will be identified that aren’t on the lists. It is hoped that lists in the future will be able to give more information and be more refined.

**Procedures:**

1. The Head of Access Services and the Head of Collection Development will work to determine the areas to be flagged, consulting with relevant collection managers.

2. Lists will be generated from ALEPH in call number order and put into Excel. Lists will be generated for titles that have publication date 15 years or older and that have not circulated since we migrated to ALEPH (Summer 2001). [Note: no title will be reviewed for storage that has circulated in the last 10 years—stacks services will check this as they flag titles. See # 3 below.]

3. Stacks services personnel will flag call number sections according to the lists, checking to make sure that a title has not circulated in the last 10 years.

4. Collection managers will be notified when a call number area has been flagged for their review. Stacks Services will provide them with the ALEPH list. [Lists will also be put in the folder \collections\storage\new srlf lists\] Collection manager review of their assigned area should be done within 2 months from the time they receive notification for review.

Collection managers will go to the stacks and review titles, using the list and visible flags as a basis. The collection manager must mark the flag in each book they decide can go to storage and/or be discarded. [If there is no mark when books are pulled for processing, the default will be SD—SRLF/Discard]. If collection managers identify additional titles for storage that are not flagged, they can insert a marked flag in each additional item. [Collection managers have the discretion to flag an item for storage regardless of the last check-out date. The guideline of 10 years or more without check-out is only used for initial flagging by Stacks Services.]

The collection manager will circle one of the following choices on the flag for each title:  

- **SD** - SRLF with Discard as the back-up if already at SRLF **Default, if the flag is not marked**
- **SA** - SRLF with Local Annex as the back-up if already in SRLF
Discard

Special instructions: Collection managers must make specific notes/instructions for processing on the flag itself (e.g. please discard this copy, even though it has circulated within the last 10 years—another copy is being left in the collection.) Please remember that student workers must be able to interpret your notes/instructions.

Notes on multiple copies: If there is more than one copy of a title, and you would like one copy kept in the library, you must select the copy that is in the best shape overall, and note clearly that that is the copy to be kept, regardless of circulation.

Note on multi-volume titles with multiple copies: For multi-volume, collection managers must select the copy for which the volumes are in the overall best shape. Unless there is significant damage to a volume, do not mix volumes with different copy designations to create a remaining set. [The catalog maintenance work for making records changes and re-linking for mixed volume/copy designations is significant and complex. We want to do this only when there is not one set of volumes in sufficiently good condition to keep.]

**Flags must be pulled from any titles that the collection manager does not want to go to storage.**

5. The collection manager will notify the Head of Access Services when review of a call number range is completed, and indicate whether or not additional time is needed for faculty review of items flagged for storage.

6. **If the collection manager chooses to notify faculty, the template notification letter (l:\collections\....) can be sent to targeted faculty. Faculty will have 4 months to review titles. Faculty should be notified as soon as the collection manager has been notified to begin reviewing a section, so that the time needed to complete everyone’s review is no longer than 4 months. (Collection managers should take no more than 2 months; an additional 2 months can be added where faculty review is requested.) For any title that faculty do not want sent to storage, they will be asked to simply pull the flag from the book.

7. When the appropriate review period is completed, Access Services will pull from the shelves only the titles that still have a flag in them, as long as the flag doesn’t indicate that the book should not be sent. Books on the list that do not still have flags will not be pulled from the shelves. Books will be sent to the CatalAcq Research Unit for processing.

8. The CatalAcq Research Unit will check books in Orion, and change locations for those not already at SRLF. Those at SRLF will be processed either for Local Annex locations or discard, as indicated by the collection manager. SRLF processors should accept and process all books with flags, regardless of last check-out date. If there are any questions about processing, set the materials aside and contact Lucia Snowhill.

9. Books will be sent to Stacks Services to be cleaned, mended, etc. and packed for SRLF.