Conducting a Map Collection Review

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A division of the American Library Association

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Many, many thanks to Brianna Marshall, my immediate supervisor during the map collection review, who offered constant support and helped me navigate the twists and turns of conducting the review. Brianna was also instrumental in the creation of this workbook.

Thanks also to Craig Haggit and Maggie M. Long for their thoughtful review of the manuscript.

Lastly, my appreciation to all who care for maps and geospatial materials in libraries—your dedication, creativity, and collegiality is continually inspiring.
How to Use this Workbook

Map collection reviews can be emotionally trying and a lot of work. They can also uncover happy surprises and provide numerous learning opportunities.

This workbook will help you surface important considerations and organize your thoughts as you approach the process of efficiently conducting a review while respecting the materials and stakeholders involved.

The focus of this workbook is on sheet maps, although shelved and miscellaneous items are also considered.

The workbook was compiled from the standpoint of an academic library in the United States, but can be adapted to other types of institutions in other locations. Keep your institutional context in mind as you use the workbook to plan and carry out the review.

The contents are arranged in roughly chronological order, from initial planning to wrapping up. You might want to scan the workbook first, then dive into whichever sections meet your needs. Consider searching the document for all instances of a term that is of particular interest to you; different aspects of it might be brought up throughout the workbook. Some content may be spot-on for your circumstances; in other sections you may need to modify the approach, or you can disregard what’s offered altogether. Note that you can zoom into the document as needed to see details in some of the figures more clearly.

Whether you know and love your map collection or haven’t yet become well acquainted, consider this workbook your companion as you move from “how in the world ...?” to “job well done!”
Librarianship has its own special set of terms that may be unfamiliar to the rest of the world. This is true of map librarianship in particular, as well as of project management. Since this workbook contains jargon from these fields, following is a list of terms and acronyms.

<table>
<thead>
<tr>
<th>Term</th>
<th>Explanation</th>
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</thead>
<tbody>
<tr>
<td>Flat map case</td>
<td>A cabinet or case with wide, shallow drawers designed to provide horizontal storage of maps, blueprints, etc.</td>
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<tr>
<td>Gazetteer</td>
<td>A reference that contains a list of names of places, usually including additional information such as latitude and longitude.</td>
</tr>
<tr>
<td>Index map</td>
<td>A type of finding aid that allows users to discern which map or maps in a series covers their area of interest.</td>
</tr>
<tr>
<td>Kraft paper</td>
<td>Strong, thick paper, typically medium-light brown, used in paper bags and other products. Available in rolls of various widths, it is frequently used to create folders for sheet maps stored in flat map cases.</td>
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<td>Term</td>
<td>Explanation</td>
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<tr>
<td>Orthophotoquad</td>
<td>This US Geological Survey (USGS) product (1987-2006) corresponds to a 7.5 minute topographic quadrangle but features aerial or satellite imagery that has been mosaicked and rectified to have a map’s georeferenced qualities. The digital format is known as a Digital Orthophoto Quadrangle (DOQ).</td>
</tr>
<tr>
<td>Raised relief map</td>
<td>A map, typically formed from thin plastic, that represents (with exaggerated scale) the elevation of hills and other topographic features in three dimensions. Among the most common raised relief maps are the USGS 1:250,000 topographic map series.</td>
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<td>Term</td>
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<tr>
<td>Sanborn map (fire insurance map)</td>
<td>Detailed maps (1:600 scale) of US cities and towns, created by the Sanborn Map Company in the 19th and 20th centuries. Originals were published in bound volumes. Updated over time, the maps provide a record of changes in individual buildings over the decades. Sanborn maps, and fire insurance maps created by other companies, are an excellent resource for historians and urban geographers.</td>
</tr>
<tr>
<td>Scale</td>
<td>A fraction or ratio of distance on the map compared to distance on the ground. Scale might be expressed in formats such as 1:24,000, 1” = 2,000’, 1 cm = 5 km. In some frustrating cases the map only includes a bar scale; one must then measure a unit on the bar scale to calculate the ratio.</td>
</tr>
<tr>
<td>Thematic map</td>
<td>A map that portrays the pattern of a particular subject matter, usually of a feature that is not naturally visible (e.g. socioeconomic indicators, climate, species distribution, etc.).</td>
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<tr>
<td>Term</td>
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<tr>
<td>Topographic map</td>
<td>A map that portrays elevations and geographic positions for both natural and man-made features. Often used as a basic reference map (base map; also spelled as “basemap”).</td>
</tr>
<tr>
<td>Topographic quadrangle</td>
<td>Also known as topo quads, or “topos,” these are topographic maps that are typically produced for a region/nation using a standard set of map scales and dimensions. These sets may be referred to by their scale, or by the number of minutes or degrees of latitude/longitude each sheet covers. For instance, USGS topographic quadrangles at a scale of 1:24,000 are also referred to as 7.5 minute quads.</td>
</tr>
<tr>
<td>USGS</td>
<td>United States Geological Survey is a primary producer of topographic map series, geologic maps, reports, and other US geospatial data.</td>
</tr>
<tr>
<td>Vertical map case</td>
<td>A storage case in which maps, blueprints, etc. are stored vertically, as in a file drawer.</td>
</tr>
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### Librarianship

<table>
<thead>
<tr>
<th>Term</th>
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<tr>
<td>Bibliographic (bib) record</td>
<td>A type of catalog record that contains fields for all information related to an item, except location and bar codes.</td>
</tr>
<tr>
<td>Catalog record</td>
<td>Contains information about a particular item in the library: author, title, date published, subject, location in the library, etc. Catalog records in OCLC are typically created using MARC format. See also OCLC and MARC format.</td>
</tr>
<tr>
<td>Cataloged vs. classified</td>
<td>A cataloged item has a record in the library’s online catalog; it will have been classified (assigned a call number). A classified item has been assigned a call number for shelving or filing purposes, but may or may not be in the library catalog.</td>
</tr>
<tr>
<td>Cataloged vs. uncataloged</td>
<td>A cataloged item has a record in the library’s official system. An uncataloged item might be inventoried somewhere, but doesn’t have a record in the catalog.</td>
</tr>
<tr>
<td>Collection development policy</td>
<td>A guide for selecting, acquiring, maintaining, and retaining materials in a collection, in accordance with the overall mission of the library or unit.</td>
</tr>
<tr>
<td>Term</td>
<td>Explanation</td>
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</tr>
<tr>
<td>Conservation</td>
<td>Actions taken to repair or restore damaged or neglected items. See also <em>Preservation</em>.</td>
</tr>
<tr>
<td>Deaccessioning</td>
<td>The process of officially removing materials from the collection. See also <em>Weeding</em>.</td>
</tr>
<tr>
<td>Encapsulation</td>
<td>A means of preservation in which a document is sandwiched between two sheets of clear polyester. Unlike lamination, the document can be removed from the protective sheets if desired.</td>
</tr>
<tr>
<td>FDLP</td>
<td>Federal Depository Library Program. Libraries in this program receive certain classes of federal documents (including maps) free of charge. Special rules apply for removing depository items from a collection.</td>
</tr>
<tr>
<td>Grey literature</td>
<td>Document types produced outside of traditional publishing channels. Examples include government reports, newsletters, conference proceedings, field trip guides, etc.</td>
</tr>
<tr>
<td>Holding record</td>
<td>A type of catalog record that contains fields that indicate what copies of the item are owned and where they are held, in both physical and digital format. Particularly useful for serials (journals, magazines, etc.). Seldom applied to maps, since map serials are rare.</td>
</tr>
<tr>
<td>Holdings</td>
<td>The entire collection of materials owned by a library. In most institutions, not all holdings are cataloged.</td>
</tr>
<tr>
<td>Item record</td>
<td>A type of catalog record that contains fields that indicate shelf location, temporary location, circulation rules, and current and past activity. Item records don’t describe the contents of the item.</td>
</tr>
<tr>
<td>Library of Congress classification</td>
<td>Also known by the acronym LCCS, the library classification system developed by the Library of Congress that is used by most research and academic libraries in the United States. (The Dewey Decimal Classification System (DDC) is primarily used in K-12 and public libraries.)</td>
</tr>
<tr>
<td>LMS</td>
<td>Library Management System. Software designed to perform the basic tracking functions of a library. An Integrated Library System (ILS) is basically the same as an LMS.</td>
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<tr>
<td>Term</td>
<td>Explanation</td>
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<tr>
<td>MARC field</td>
<td>A field in library records corresponding to a particular type of data and designated by a 3-digit number. Certain MARC fields, such as 034, 052, and 255, are of particular concern for maps.</td>
</tr>
<tr>
<td>MARC format</td>
<td>MARC is the acronym for Machine-Readable Cataloging.</td>
</tr>
<tr>
<td>Needs &amp; offers (N&amp;O)</td>
<td>Items no longer being retained in a collection are listed in communiques distributed to other institutions, who can express interest in acquiring them. Specific guidelines exist for doing this with FDLP items.</td>
</tr>
<tr>
<td>OCLC</td>
<td>An American nonprofit cooperative organization, OCLC and its member libraries produce and maintain WorldCat, a prominent online public access catalog.</td>
</tr>
<tr>
<td>Preservation</td>
<td>In libraries, a department or a set of activities concerned with prolonging the life of an object while entailing minimal changes to the object. Preservation indicates actions to prevent damage or decay. See also Conservation.</td>
</tr>
<tr>
<td>SuDoc (Superintendent of Documents)</td>
<td>A library classification scheme used by the US Government Printing Office in which the principal organizing feature is the agency, bureau, or office of origin.</td>
</tr>
<tr>
<td>Usage statistics</td>
<td>Documentation regarding an item’s checkout or reshelving history.</td>
</tr>
<tr>
<td>Weeding</td>
<td>The process of removing unwanted materials from a collection. See also Deaccessioning.</td>
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</table>

**Project Management**

<table>
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<tr>
<th>Term</th>
<th>Explanation</th>
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<tr>
<td>FTE</td>
<td>Full Time Equivalent. A way to summarize workloads needed to complete a project. Example: Two employees each working half time on a project equate to one FTE.</td>
</tr>
<tr>
<td>Gantt chart</td>
<td>A type of bar chart used to visualize a project timeline, illustrating the start and stop days, weeks, and months of various project components.</td>
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</table>
1: Getting Started

Identify Key Logistical Concerns at the Outset

You’ve been tasked with conducting a map collection review? Congratulations! You’ll have the opportunity to see lands familiar and mysterious, as rendered in a multitude of cartographic styles for a variety of purposes.

Smart preparation before diving in will help the whole project flow in a coordinated, organized way with a minimum of obstacles. Get a handle on what's involved by considering the answers to the following questions.

**WHY**

- **What is the motivation for starting a map collection review?**
- **What are the desired outcomes?** (Examples: evaluate for deaccessioning; update bib records and holdings.)

**WHEN**

- **To your knowledge, has the collection been reviewed before?**
  - If so, how long ago?
  - Do you have access to documentation regarding the previous review/survey?
  - Do you have contact information for anyone involved in the previous review?
- **Has a deadline been established for completing the review?**
  - If so, what is the date and the amount of time you have from today?
  - Is the deadline soft or firm?

**WHERE**

- **In addition to being reviewed, will the map collection be relocated?**
  - If so, how soon?
  - Where will the components of the collection be moved?
  - Are the dimensions of the space(s) known?
- **Are maps held in other portions of your library (government documents, special collections, etc.)?**
  - Is there any known duplication of holdings?
Do other libraries in your institution have map holdings? List the locations:

**HOW**

- Is there any existing documentation relating to collection assessment or maintenance?
  - If not, would creating such documentation be helpful?
  - If so, is there a need to review and possibly revise the guidelines?

**WHAT**

- Do you have or can you create a list of your map holdings?

  It will be helpful to get a general feel for the types and quantities of items in your collection that will be involved in your review. A checklist for conducting such an assessment is found in Appendix A. The checklist can also be used to summarize the geospatial holdings in other divisions of your institution.

**HOW MUCH**

- For which parts of your collection (if any) do you have usage statistics?
- Considering map collection usage in the last two years:
  - Are some categories of maps used more than others?
  - Which types have higher usage?
  - Which types are rarely or never used?
- Do you anticipate adding previously uncataloged maps to the catalog?
  - If so, give an estimate of the number of items or percentage of your holdings to be cataloged.

**WHO**

- Do some categories of patrons (faculty, students, community) use the collection more than others?
- If you’re in the planning stage, with whom have you discussed the map collection review? Select all that apply:
  - Administrators
  - Other library staff
  - Faculty and instructors on campus
  - No one yet
  - Other: ____________________________
- Is your library a part of the Federal Depository Library Program (FDLP), state depository, or neither? (This can be very important, as special rules apply for removing depository items from a collection.)
STATEMENT OF WORK

- Begin drafting a concise statement you can use to explain the map collection review and the desired result.
  - Can you frame it to highlight ways in which patron needs will be better served?

FINAL NOTES AND QUESTIONS ON GETTING STARTED

Notes on key logistical concerns:

Any related questions you need to consider or follow up on:

Next steps:
2: Potential Partners

Other Units in the Library And Stakeholders Outside the Library

While you will be the person most deeply caught up in the map collection review, other people both inside and outside of the library will be involved or impacted. It’s helpful to give thought to those interactions before the project starts.

2.1 INVOLVEMENT IN THE LIBRARY

Many other librarians or library staff will be involved or impacted (or both) by the review in some way. For instance, collection maintenance staff is likely to be involved with physically removing shelved items and reshelving the remainder; subject specialists may need to be aware of the removal of items relevant to their disciplines; and special collections librarians may assess which reviewed items belong in their unit and then prepare space to receive them.

Below, to the best of your knowledge, indicate all potential stakeholders in the library who will be actively involved in the process and/or impacted by the review.

<table>
<thead>
<tr>
<th>Involved</th>
<th>Impacted</th>
<th>Unit</th>
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<tr>
<td>Cataloging</td>
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<td>Database managers</td>
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<td>IT support</td>
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<td>Access services</td>
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<tr>
<td>Collection maintenance</td>
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<td>Government publications</td>
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<td>Special collections</td>
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<td>Subject specialists</td>
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<td>Facilities</td>
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<td>Preservation/Conservation</td>
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<td>Security</td>
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<td>Supply procurement</td>
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<td>Human resources</td>
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<td>Communications</td>
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<tr>
<td>Administrators</td>
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<tr>
<td>Involved</td>
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<td>Unit</td>
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- Who in this list will need to be kept current on progress and obstacles throughout the process?
- What methods will you use to update these key players and receive their feedback?
  - Meetings? How often?
  - Reports? How often?
  - Project management software?
  - Some combination of the above?
- Are there known limitations on the involvement of any of the above units during the timeframe of the review? (Examples: higher-priority projects, staff on leave, etc.)
- Could any parts of the review process potentially be outsourced? (Examples: cataloging, conservation/preservation.)
- Your first impression: Might staff need to be hired or reassigned to assist in the collection review’s day-to-day tasks? (In Chapter 8: Project Planning, you’ll find guidance for calculating how many full-time equivalents (FTE’s) are needed to accomplish the review.)

### 2.2 OUTSIDE STAKEHOLDERS

- Who might be impacted by decisions made during the review?
- How much transparency is prudent with each?
- As applicable, list the names of key stakeholders in each category and your first impressions on how involved they can/should be in advising on the process or in taking withdrawn items.
  - Faculty:
  - On-campus researchers:
  - Students in the following departments:
  - Campus staff:
  - Community members:
  - Other:
FINAL NOTES AND QUESTIONS ON POTENTIAL PARTNERS

Notes on potential partners:

Any related questions you need to consider or follow up on:

Next steps:
3: Clarity at the Outset

Gain Understanding from Administrators on the Broader Context of the Review

Did the previous two chapters make your head spin? Reviews can be complex!

With all the dimensions of the review now swirling in your brain, meeting with one or more appropriate library administrator(s) and your supervisor(s) should help you gain clarity on their expectations and the universe in which the review will occur.

Here are some questions and areas for exploration in an initial meeting with administrators.

- What metrics will be used to evaluate the success of the review?
- If a collection development policy does not already exist for the map collection, may we devote some time to creating one now?
- Discuss the possibility of customizing the library’s existing collection review / withdrawal criteria for the map collection review. (Examples: handling of multiple copies, digital presence, need for repair.)
- Bring up any existing or proposed collection agreements or mandates that may influence which items are to be retained in the map collection. (Examples: sister campuses, FDLP.)
- If a deadline exists for completing the review, how firm is it?
- Can we guard against “mission creep” by identifying tasks that will not be part of the scope of my / my staff’s work on the project, or that could be postponed for a later time?

TIP
Ask, don’t assume! You probably don’t know and can’t anticipate all of the circumstances, consequences, and forces that will come into play. The administrators might not either, but hopefully they can fill in some of your knowledge gaps.

TIP
Take notes during the meetings and share the documentation with participants to review afterwards. Statements made at the outset might not be remembered later and may even be contradicted. Better to have it in writing.
Conducting a Map Collection Review

- Will there be a special task force or committee devoted to the map collection review (and move, if applicable)? Will the chain of supervision be any different from whom I report to now?

- Can extra resources be allocated if needed to attain the expected outcomes? (Examples: staff, elapsed time, outside help for cataloging or evaluating the materials.)

- Are there known constraints on the ability of other library units to support the collection review?
  - May I directly contact other staff members when I need their assistance, or should I route the request through their supervisor?

- Could other units in the library possibly absorb some of the materials from the map collection? (Examples: special collections, government publications, the general collection.)
  - If so, could we hold discussions regarding quantities and procedures?

- Who would need to be contacted specifically when it comes to permanent deaccessioning decisions?

- If needed, can I temporarily step back from some of my other work responsibilities while conducting the review?
  - Which responsibilities can be sacrificed? Which ones must be maintained?

- Please discuss the degree of transparency you look for with faculty and other stakeholders. Should any of them receive status updates as certain milestones are reached?

- What terminology would you prefer to be used in discussing this process? (Examples: map collection review, survey, assessment, evaluation, weeding, etc.)

- Are there any expectations regarding the post-review size of the map collection?
  - How critical is it to meet those expectations?

- Should one or more sections of the map collection be prioritized? (Example: Should the map case contents be reviewed before tackling the shelved items?)

- Discuss the library’s capacity for digitally preserving printed maps and information currently stored on obsolete or near-obsolete media.

FINAL NOTES AND QUESTIONS ON CLARITY AT THE OUTSET

Notes on the context of the review:
Any related questions you need to consider or follow up on:

Next steps:
Now Comes One of the Fun Parts: Becoming More Familiar with Items in the Collection!

Before you establish collection review criteria and methodologies, taking a random look at holdings from each part of the collection will provide you with a more informed framework for the types of decisions and actions needed for each type of material.

As you encounter each item, think about the following questions.

- **What might be the arguments for keeping this?**
  - Who—if anyone—in the user base might want to ensure this item stays in the collection?

- **What might be the arguments for withdrawal?**

- **If on the fence about the item’s fate, what factors might sway the decision?**

**TIP**

For each part of the collection sampled, you might want to establish three piles: Would Withdraw, Would Keep, and Not Sure. Label the piles so others know not to disturb them. Then, revisit these piles once you’ve established a preliminary set of criteria and see how much your initial sorting changes. Reviewing the piles with a stakeholder such as a faculty member might be a good idea.

- **Is this item cataloged?**
  - A library-branded barcode is good evidence that an item has been cataloged.

**TIP**

Barcode stickers may be in less-visible places, such as inside the front or back cover of a bound volume, or on the blank or opposite side (verso) of a sheet map.
Is a duplicate of this item definitely or probably found elsewhere in the library? Is the duplicate likely to be in a better condition than this item?

Below is a list of suggested locations and types of maps to sample. Note that the list is only a starting point: Given your specific situation, add and/or subtract categories as appropriate.

At the same time that you’re assessing what your review decision might be for individual maps, it will also be helpful to make notes regarding the overall attributes (dates, map scales, etc.) of what you encounter in each sample. A worksheet to record your findings is in Appendix A.

Maps in flat map cases or vertical cases

- For your country, find one state/province not your own and include both topographic maps and thematic maps
- One representative country in Africa, Asia, Europe, North America, and South America; include both topographic maps and thematic maps
  - For only one of these continents, sample holdings at the continental or subcontinental level (example: Southeast Asia)
- Australia; Antarctica
- “The World”
- “The Universe”
- At least one ocean
- Geographic area(s) of particular interest at your institution (could be one of same groups chosen above)

Rolled maps

- Open up at least two rolls tucked in corners, stands, or on top of map cases (Note: Much of the time, rolled maps are not an official part of the map collection.)

TIP

If you don’t have a library background or are a bit rusty on cataloging, these early stages are a great time to gain understanding of:

- the relevant parts of your library management system or integrated library system (LMS / ILS).
- the difference between an item being cataloged and being classified.
- the different types of records an item might have (bib, holding, item) and what the implications are for catalog records when an item is withdrawn from or added to the catalog.
- fields in a catalog record that are important for maps.

For an example of information covering the basics of map cataloging, see https://silol.tips/download/map-cataloging-learning-the-basics.
Conducting a Map Collection Review

Shelved maps

- Folded maps: choose a few samples
- Folded road maps and tourist maps: assess the variety

If time allows, briefly sample the following types of items. For these, your review criteria and methodology will probably follow how reviews are conducted in other parts of the library (example: consulting spreadsheets that contain usage statistics). Nevertheless, be on the lookout for unique circumstances that might warrant a different approach.

Shelved

- Reference section (atlases, gazetteers)
- Books (some atlases may be shelved here, as well)
- Oversized atlases
- Journals
- Dissertations and theses
- Grey literature (government reports, conference proceedings, etc.)
- Bound documents containing supplemental maps in pockets
- Other: __________________________

You might want to ponder the potential fate of the following types of items, as well.

Media

- CDs, DVDs
- Microfiche
- Other: __________________________

Globes

Aerial photographs

- Individual prints and transparencies
- Rolls of film stored on spools in canisters
- Other: __________________________

Before moving on, take a moment to reflect on the surprises and treasures you encountered during this preliminary dive—and know that more discoveries await when you conduct the actual review!
FINAL NOTES AND QUESTIONS ON EXPLORING THE COLLECTION

Notes on exploring the collection:

Any related questions you need to consider or follow up on.

Next steps:
5: Develop Criteria

Formulate Decision Rules for Retaining or Withdrawing Maps

At this point you will have an idea of the resources potentially available to you in your institution’s universe and assessed the range of materials in the map collection.

It’s time to make the first attempt at creating a decision flowchart for the review. This type of documentation will minimize uncertainty and enhance consistency as you or staff make individual decisions on thousands of items.

Any existing documents regarding collection assessment or maintenance, for the map collection or the library overall, could serve as your main point of reference for developing and ranking criteria.

The criteria, which can be revised later, will set the stage for developing a review methodology.

5.1 RANK THE CRITERIA

The following table shows some criteria that may influence your decision to retain or remove an individual map or a map series. You may have additional criteria as well. A comparable set of criteria can be developed for shelved items.

Rank the influence of all criteria that matter in your situation. For instance, if a map has had recent usage (an argument for “retain”) but also will have persistent, reliable online availability (an argument for “remove”), which criterion will hold more sway in the review decision?

Assign a “1” to the most influential criterion—meaning you will retain a map that meets this criterion regardless of whether it meets the other criteria—and go down from there. Ties are OK.

TIP

Consider keeping an unofficial criterion of “this map is just too cool to remove!” in your back pocket. Throughout the review, judiciously allow yourself the option to override the official removal criteria by playing the very cool map card. It’s a morale booster.
### 5.2 ADDITIONAL DECISIONS

Note that the decisions you need to make don’t end with the determination to retain or remove.

**If a map sheet is being retained:**

- If uncataloged, should it be cataloged?
- Is it in need of repair or encapsulation?
- Should it possibly be transferred to another library unit, such as special collections?
- If duplicate copies exist in the library’s holdings, will any/some/all be removed?
- If there are earlier editions or print dates, will any/some/all be removed?

**If a map sheet is being removed from the collection:**

- Does it need to be removed from the catalog?
- Should it be offered to other entities in your institution? If so, which one(s)? *(See Chapter 11 for more discussion on offering maps to others.)*
- Will some or all duplicate copies in the library’s holdings also be removed?
- Will other editions also be removed?
5.3 NUANCED CRITERIA

Introduce flexibility in decision rules where appropriate.

For instance, consider the US Geological Survey (USGS) topographic map series. Historic and recent editions of all scales are available for download online. Still, having printed maps on-hand can be valuable, especially for areas of interest to your patrons.

If significantly downsizing your sheet map collection is a priority, thinning out your topographic map holdings can free up a lot of drawers fairly quickly. Rather than creating a decision rule that would be applied to all USGS topographic maps, you might consider setting conditional rules based on proximity to your location, such that more copies, editions, and scales are retained for maps closer to home. An example of this follows.

- **Your home state**
  - Keep one copy of each edition of each map, at all scales; remove duplicates
    - Exceptions:
      - Retain all copies of topographic maps covering your immediate area
      - Retain orthophotoquads, regardless of whether they duplicate topographic map quadrangles in your holdings

- **Neighboring states**
  - Remove all copies of maps at scales larger than 1:60,000 (i.e., 1:24,000 and similar)
  - Keep the latest copy of all maps having scales at or smaller than 1:60,000; remove duplicates and earlier editions

- **All other states**
  - Remove all copies of maps at scales larger than 1:250,000
  - Keep one copy of the latest edition you have of the 1:250,000 maps; remove duplicates and earlier editions
  - Keep at least one edition of the state map series (often 1:500,000 scale) for each state

5.4 SHELVED ITEMS

It's likely that the review process for shelved, cataloged items will depend almost entirely on spreadsheets that contain usage statistics, generated from your LMS / ILS. It may be possible to generate reports that show holdings at sister institutions and/or whether the item is available digitally, although someone may have to research those parameters one by one. It usually won’t be necessary to look at the items on the shelves.
Here are examples of criteria you could make for removing an item.

- Last checkout was more than 15 years ago
- Total number of checkouts is 0 and the publication date was more than 15 years ago
- Duplicate copies exist elsewhere in the library or at sister institutions
- Persistent digital presence (example: US Geological Survey reports)
  - If these are FDLP items, appropriate weeding procedures need to be followed. See chapters 6 and 11 for more discussion.

However, you might establish criteria which, if applicable, would override removal.

- Of local interest
- Supports current or emerging research
- Authored by a faculty member

Shelved, uncataloged items will present many of the same challenges as reviewing the sheet maps. It may be necessary to look at them (or representative samples) in person.

### 5.5 CREATE A CRITERIA GUIDE

Once you’ve made your first attempt at identifying and ranking criteria, you’ll want to organize the results in ways that will serve as a guide for anyone helping in the map review. You could use any or all of the suggestions below. Prepare to revise them as they are tested out!

- Arrange the decision criteria in order of importance.
- Create an outline with several if/then statements leading the user down the appropriate path.
  - You could adapt the **dichotomous key** structure used by naturalists.
- A **decision tree** could be a helpful visual. Search online for instructions or templates to use in the platform of your choice.

Figure 1 is an example of a map collection review decision tree made in Excel.

With your preliminary criteria guidance in hand, go back to the map samples you reviewed in Chapter 4.

- **Would you change your decision for the fate of any of the maps?**
- **Do you now have a decision for any of the “Not Sures”?**
- **Do you need to rearrange or otherwise tweak your criteria for retention?**

### FINAL NOTES AND QUESTIONS ON DEVELOPING CRITERIA

Notes on criteria:
Figure 1. Map collection review decision tree

Any related questions you need to consider or follow up on:

Next steps:
Develop Step-By-Step Methodologies for Reviewing Maps and Shelved Items

At this point it might seem like all you have to do is march over to the collection with your criteria in hand and start digging through until you’re done. Sadly, it’s more complicated than that.

Save headaches down the line by formulating procedures: document what to do with each type of item and what steps to follow regarding each type of outcome (anything from “it goes back in the drawer” to “it goes away forever”).

Why bother with documenting procedures?

- You might have assistants, such as student workers, who are not as immersed in the process as you are; they will need clear guidance to refer to.
- Documented procedures will help ensure a consistent approach, especially if long time gaps occur in working on particular parts of the review.
- Documenting will help you keep track of procedural updates and the rationale behind decisions. Explaining the rationale can be useful for cases in which a documented process might seem counterintuitive or could be misinterpreted.

The overall approach might be to:

- Formulate procedures for a task, then test them out
- Develop time estimates for each component of each task
- Create spreadsheets or other documents for tracking the status and location of the items
- Write easy-to-understand methodologies

6.1 Formulate and Test Procedures

6.1.1 Formulate procedures

Think through sensible procedures for the major tasks of your collection review.

- Focus on the task(s) that will be started first.
  - It’s probably OK to wait on creating procedures for tasks that are further downstream—in fact, what you learn by performing the earlier tasks may influence the procedures you create for the later tasks.
Conducting a Map Collection Review

- However, do keep later tasks in mind. Can the workflow for earlier tasks be designed to promote efficiency at later stages?

> Due to likely differences in factors such as usage tracking, percentage of uncataloged material, and digital availability, you may need to create notably different procedures for the following items.
  o Map series (Example: topographic maps)
  o Thematic maps
  o Shelved items and subcategories of shelved items
  o Media

> Usually a task has several components. In formulating procedures, you'll want to think through any ambiguity or obstacles that may occur in each component.
  o For instance, one task might be “Examine Thematic Sheet Maps.” The components of this task might include:
    1. assess whether to retain or remove;
    2. assess relevant map characteristics (damage, cataloged, depository);
    3. move to appropriate pile.
      a. ambiguity: What if a map qualifies for two different piles?

Other random considerations:

> Do you have enough surface space to lay out multiple stacks of maps? If not, can you use empty map drawers? How will the stacks/drawers be labeled?

> At what point in the process will it make sense for items remaining in the collection to be shifted into new drawers or shelves?

### 6.1.2 Test the procedures

It's one thing to think up procedures in the abstract, but nothing beats giving them a trial run with actual items to see how the procedures would play out. Test the procedure you've conceived for each task on a small but diverse sample of items.

> Use some of your previously sampled maps (see Chapter 4).

> Also test the procedures on a brand-new sample of maps, shelved items, or records in a spreadsheet to ensure you test the procedures for each kind of collection item.

You'll need time estimates for planning the project timeline (see Chapter 8). Since you're testing out procedures now, seize the moment to also generate estimates of how much time each component of each task will take.

### 6.2 DEVELOP TIME ESTIMATES

Chances are that while testing a procedure for the first time, you might be a little slow and hesitant with the first few items you process. Once the procedure becomes more practiced, start paying attention to how much time things are taking.
Make note of the total time it takes you to process a “unit” of items.

- What’s a unit? It could be something like: 25 maps, one map drawer, 20 spreadsheet rows, etc.
- With repetition, would you expect the task to take less time or the same amount?

For simplicity, round estimated time per unit to the quarter hour (0.25, 0.5, 0.75, 1.0 hour, etc.).

**TIP**

Rounding your time estimates up to the next quarter hour will give you breathing room for unexpected snags and will make you look good if all goes smoothly.

### 6.3 TASK EVALUATION WORKSHEET

To summarize the components you’ve formulated for each task and the estimated time to complete them, consider using copies of the task evaluation worksheet found in Appendix A. (It’s OK if some tasks aren’t worth breaking into components.)

The worksheet also provides space to note the type of worker suitable for each component. For instance, you might decide that only a librarian should perform the first component in a task, while a staff member or student could perform the others.

You might refer to these task evaluation worksheets when writing methodologies and when assessing any procedural bottlenecks that are hindering progress once the process is underway.

### 6.4 CREATE TRACKING DOCUMENTS

Given that large numbers of items will be passed through many procedural stages, it’s important to determine how best to track the status and location of the items.

Spreadsheets work well for tracking in most cases. However, you might decide that printed charts, forms or slips will work better for tracking some types of items at some stages of their processing.

Here are other points to consider about creating documents for tracking:

- Which processes can be tracked digitally, and which are more easily updated with printed forms, charts or spreadsheets?
- What categories of information should be included on each spreadsheet/form/chart?
- How should changes in status or location be indicated:
  - filling in cells/blanks/boxes with initials and/or dates
  - color-coding
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- providing one master document, or updating separate sheets for each location or stage

- How will collaborative access to the tracking documents be provided?
- Will provision be made for the user to document out-of-the-ordinary circumstances?
- At each step, will it make more sense to update the tracking form or spreadsheet one item at a time, or in bulk?

TIP
If using printed status charts for updates, consider taping a clear plastic overlay to the chart for individuals to write on. Mistakes are more easily corrected that way. Using different colored markers can help convey different types of information at a glance.

Figure 2 provides an example of how a spreadsheet can be used for tracking the status of items and decisions made. Figure 3 is an example of a tracker, which could be digital or printed, to summarize the status of task completion for sheet maps drawer by drawer.

<table>
<thead>
<tr>
<th>Call Number</th>
<th>Date first handled</th>
<th>SERIES</th>
<th>Date to Preservation</th>
<th>Date from Preservation</th>
<th>Date to Cataloging</th>
<th>Date from Cataloging</th>
<th>Revised Call Number</th>
<th>Title</th>
<th>Publisher</th>
<th>Year of Publication</th>
<th>Scale</th>
<th>Area</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>G3301 D2 1966 S2</td>
<td>080221</td>
<td></td>
<td></td>
<td>080421</td>
<td>090821</td>
<td>Map Of The North America, Vegetation And Land Use</td>
<td>SAMAH GEOGRAPHIC AND DRAFTING INSTITUTE</td>
<td>1966</td>
<td>1:12,000,000</td>
<td>NORTH AMERICA</td>
<td>Text in Arabic</td>
<td></td>
<td></td>
</tr>
<tr>
<td>G3311 C8 1976 U5</td>
<td>080221</td>
<td>2 sheets</td>
<td>080921</td>
<td>082321</td>
<td>083421</td>
<td>092921</td>
<td>G3301 C9 1976 A4</td>
<td>Subsurface Temperature Map Of North America</td>
<td>GEOLOGICAL SURVEY (U.S.)</td>
<td>1976</td>
<td>1:500,000</td>
<td>NORTH AMERICA</td>
<td></td>
</tr>
<tr>
<td>G3312 N52 1913 G4</td>
<td>080421</td>
<td>080921</td>
<td>082321</td>
<td>08321</td>
<td>Topographic Map Of The Niagara Gorge</td>
<td>GEOLOGICAL SURVEY (U.S.); GEOLOGICAL SURVEY OF CANADA</td>
<td>1913</td>
<td>1:12,000</td>
<td>NEW YORK; ONTARIO (CANADA); MAG ARA; NIAGARA RIVER</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>G3504 S0 U5</td>
<td>A.M. 1</td>
<td>0731</td>
<td></td>
<td></td>
<td></td>
<td>British Columbia 1:50,000</td>
<td>U.S. ARMY MAP SERVICE</td>
<td>1949</td>
<td>1:50,000</td>
<td>BRITISH COLUMBIA</td>
<td>available online</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Figure 2. Spreadsheet example for tracking item status

When you write the methodologies, be sure to include instructions about how to record status updates as the item passes through each stage.

6.5 WRITE METHODOLOGIES

Once you’ve tested your procedures and believe they are workable, you might want to create several procedure documents, each one relevant to a different part of the process or a different set of participants. See Appendix B for examples.
For clarity and ease of comprehension, use outlines, lists, images, and screenshots rather than long descriptive passages. Link to any documents or websites the reader might need to refer to.

Write to the level of the participant who has the least familiarity with the collection.

- Include steps that might seem obvious to you but are new to others.
- At the beginning or end of the document, include a statement that questions are encouraged! It’s always better for a worker to ask for clarification than to think they shouldn’t bother you and plunge ahead, potentially on the wrong path.
  - Don’t assume people will make appropriate decisions when they are uncertain.
- Be prepared to revise and update the methodologies once the review is underway. Retain and date all major versions.

### 6.6 SPECIAL CASES

The guidelines above apply broadly to the map collection review. Here are suggestions on establishing procedures for particular types of tasks.

#### 6.6.1 Uncataloged sheet maps

If the majority of sheet maps are not cataloged, it will be extremely helpful to make a working spreadsheet out of any existing inventory of the holdings. Add columns to a copy of the spreadsheet to track decisions and the physical location of maps as they are moved from one processing step to another. An example of this was shown in Figure 2.
For the purposes of tracking the review, consider all of the uncataloged maps in a topographic map series covering one political unit (nation, state) as one entity. In other words, if your holdings include 504 uncataloged 1:24,000 topographic maps of Texas, they count as one set of map sheets, not as 504 maps.

### 6.6.2 Cataloged items

If the bulk of your sheet maps are cataloged, you can rely a great deal on reviewing spreadsheets generated from your LMS / ILS that contain usage statistics and other types of information that may help guide your decisions.

When it comes to reviewing cataloged items of any type, you’ll want to obtain reports and spreadsheets containing information on circulation, availability elsewhere, and other parameters. If you lack the expertise to generate the spreadsheets and don’t have time to learn, hopefully the catalog database manager can do the work.

You’ll need to identify which columns of data in the master catalog database will be most helpful for you. Some suggestions: title, volume, call number, barcode, date of last check-in, library locations, availability at sister institutions, availability online (e.g. at HathiTrust). Also, the database manager may have suggestions for what to include, especially if they have prepared similar spreadsheets for colleagues reviewing other sections of the library’s collection.

Once you receive a spreadsheet for one portion of your collection, make a working copy to which you can add columns, such as “Notes,” “Need to research,” and “Final decision.”

**TIP**

At the end of your review, you’ll probably want to make a copy of your spreadsheet and sort it on the “Final decision” column. This can be shared with others, such as collection maintenance staff, who are involved with deleting the catalog records and removing the physical items.

### 6.6.3 FDLP

As alluded to elsewhere in this workbook, FDLP items—maps, documents, and other items created by a branch of the federal government and deposited in your library—often require a special set of procedures for removing them from the collection.

Your library probably has established procedures for handling FDLP items that have been weeded in accordance with basic guidance from the government. This is an excellent time to meet with anyone in the library responsible for withdrawing FDLP items to establish what your processes will be.

Figure 4. An example on an FDLP stamp
Because FDLP items will get special treatment, it’s important to train all staff who are assisting you in the map collection review to look for and recognize the ink stamp that signifies an FDLP item.

**TIP**

Unless your library has had strict and consistent rules over the years, the placement of the stamp may vary. It may be on the front or the back of sheet maps; for reports in envelopes, it may be on the envelope, on the front cover, or inside the cover.

### 6.6.4 Working with other library units

For the benefit of all involved, procedures for interactions with relevant library units will need to be established and shared.

- How will the map hand-offs work? Where, to whom, how often?
- How will the locations and fates of maps be tracked?
- How will exceptions be handled?

See [Chapter 9](#) for more on working with other units.

**FINAL NOTES AND QUESTIONS ON ESTABLISHING PROCEDURES**

**Notes on procedures:**

Any related questions you need to consider or follow up on:

**Next steps:**
7: Materials Needed

Make Sure You Have Appropriate Supplies on Hand

Below is a list of supplies that may be handy during the review. For the items you’ll want, mark how many of each you’ll need.

TIP
While conducting the review, use color coding (labels, ink, paper used for forms, etc.) or a similar, accessible system to make categories or statuses clear at a glance.

___ Library carts with wide shelves, suitable for rolls of large maps or stacks of folded maps
___ A laptop computer—great for updating spreadsheets while working with items in situ
___ Markers (such as Sharpies®)
   colors/tip sizes: ________________________________________________________________
___ Peel-off labels
   types (color-coded dots, labels to write on) _______________________________________

Figure 5.
Peel-off labels of various types
Sticky notes
  colors/sizes: ___________________________________________________________

Scissors

Packing tape

A “Withdrawn” stamp and an inkpad

Binder clips and paper clips
  types/sizes: ___________________________________________________________

Printer paper for forms and routing slips
  colors/sizes: ___________________________________________________________

Cardstock

Map drawer label covers

Kraft paper - the sturdier the better

Figure 6. Example of a clear plastic map drawer label cover

Figure 7. Kraft paper map folder
Conducting a Map Collection Review

Will you have to order any items?

How soon should you order items to have them on hand when they are needed?

Will you be shipping maps offsite for cataloging, conservation/preservation, or other reasons?

Will large maps be moved to another building?

If you will be shipping or moving sheet maps, you may need some or all of the following.

- Shipping containers
  - Tubes
  - Large flat boxes (may be known as mirror boxes or artwork boxes)

TIP
You can reuse old Kraft paper folders in the map case drawers. Cross out the old writing, flip the folder over and/or turn it inside out, relabel it, and you have a new folder.

TIP
These boxes can accommodate many more maps than even the largest tubes can.

- Packing material
- Tyvek® or similar sturdy material for creating oversized protective envelopes
- Sturdy oversized folders (e.g. file folders E size, 36” x 48”), or large sheets of cardstock to make them

Uline is one company for ordering such containers.

What is your budget for supplies?

For shipping?

What are the procedures for ordering supplies or arranging for shipping?

FINAL NOTES AND QUESTIONS ON MATERIALS NEEDED

Notes on materials:
Any related questions you need to consider or follow up on:

Next steps:
Allocate Time and Staff to Get It Done

We’ve already touched on some aspects of project management, such as establishing criteria, documenting procedures, and identifying materials needed. You’ll probably also want to use other project planning techniques to ensure the map collection review is conducted well and accomplished on time. This may seem like a lot of planning, but it can help ensure timely and accurate results.

For a thorough review of project management for librarians, consult books, articles, and webinars on this topic. Your library may have access to project management software that takes care of many of the functions discussed in this chapter. If so, great! But if you are proceeding without such tools, below you’ll find examples of project planning processes that will help you (and those further up the chain) get a handle on your map collection review.

8.1 ESTABLISHING TIMELINE

8.1.1 Time per task

In Chapter 6, you noted how much time it would generally take to accomplish each major task. Now’s the time to use those notes!

Here is the calculation to make:

\[
time \text{ per unit} \times \# \text{ of units} = \text{total work hours for task}
\]

For instance, suppose you estimated it would take 15 minutes to “Examine Thematic Maps” in one map drawer. Also suppose you have 400 drawers containing thematic maps.

In our example, 0.25 hours/drawer x 400 drawers = 100 hours.

Taking the calculations one step further, at 40 hours/week, this task would take 100 hours ÷ 40 hours/week = 2.5 weeks to complete if one full-time staffer worked on this and nothing else.

The following is an example of a worksheet to help calculate total work hours per task. A blank worksheet is found in Appendix A.
<table>
<thead>
<tr>
<th>Task</th>
<th>(a) Estimated time to complete per unit*</th>
<th>(b) Total number of units*</th>
<th>(c) Total work-hours needed to complete task</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task A</td>
<td>0.5 hr /drawer</td>
<td>106</td>
<td>53 hrs</td>
</tr>
<tr>
<td>Task B</td>
<td>1 hr /100 maps</td>
<td>525</td>
<td>525 hrs</td>
</tr>
</tbody>
</table>

**Total work-hours for project:** 578 hrs

* Units could be one drawer, X number of maps, X number of shelved items, etc.

## 8.1.2 Elapsed time

- **If your collection review has a prescribed end date:** You’ll need to ascertain how to get all the tasks done before that end date. Happily, a collection review lends itself to establishing an overlapping flow of tasks, so that several stages can be in progress at the same time.
  - Ideally, devote enough staff and enough hours to the early stages of the review so that workers downstream can process a steady supply of items without downtime or being deluged with maps all at once.

- **If your collection review doesn’t have a specified end date:** Lucky! You have more flexibility regarding staffing and hours per week devoted to the review. Still, administrators are likely to ask for an estimated end date. You may be able to provide them with a few alternative dates, given different levels of staffing and work hours per week.

- When thinking about your own time, it’s safe to allocate at least 10-15 percent of your hours to management and operations: training, supervising, communicating with others involved, troubleshooting, and assessing progress.
  - In other words, say you want to devote one entire workweek solely to reviewing spreadsheets. That’s probably unrealistic given your project management duties. Instead, deduct 10-15 percent of that time, which you’ll spend on doing things that ensure the project is flowing.
  - This will affect the elapsed time of any map collection review task you are involved in.

- Similarly, make allowances for other staff devoting time to other responsibilities they can’t abandon.

- **Vendors or other library units** that may be participating in the workflow (cataloging, conservation/preservation, etc.) will have their own estimates for how much processing they can accomplish in a unit of time. These estimates will have to be accounted for in the project timeline.
8.1.3 Time management

- For tasks that are very boring and/or easy to mess up if distracted, can you structure work assignments in a way that guards against burnout and mindless errors?
  - Example: For such tasks, state that the staff member won’t be expected to work on them longer than 60 or 90 minutes at a time.

- While some tasks/components can be done by one person working solo, in reality they might be accomplished more efficiently (and with more enjoyment) if two people work together.
  - Example: when processing a large pile of maps returned from cataloging, one person could update the tracking spreadsheet while the other sorts the map sheets by call number.
    - They could have the option of trading roles partway through.
  - You can switch back and forth between using one person or a team, as needed.

8.2 MONITORING QUALITY

Try to allow some time for quality assurance (checking others’ work), especially when a new person starts a new process.

- Find something that doesn’t look right? Check in with the person who performed the task; it could be they made that decision based on an unanticipated circumstance.
- Given that you may not be available to answer every question as it arises, create and communicate a system for addressing them.

**What mechanisms could workers use to flag items for later questions?**
(Examples: separate piles, sticky notes, color coding on a status chart.)

**In general, how often would you want to deal with questions?**
(Examples: as they arise, at the end of the person’s shift, twice a week.)

If you’d like, use the table below to document decisions about handling questions.

<table>
<thead>
<tr>
<th>Task</th>
<th>How to flag</th>
<th>When to expect an answer</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>
8.3 STAFF AVAILABILITY

Consider these questions as you move towards creating a project timeline for the map collection review.

- As of now, how many staff are at your disposal to assist with the review tasks?
- Will you need extra staff under your direction to complete the review in a timely manner?
- What levels of staff, and how many of each, will you need?
  - Librarians
    (with specialized skills?) Y: ________________________. N
  - Staff
    (with specialized skills?) Y: ________________________. N
  - Student workers

Following is an example of a table that helps summarize staffing needs.

<table>
<thead>
<tr>
<th>Worker</th>
<th>Hrs needed-total</th>
<th>Notes on availability</th>
<th>Hrs needed-Month 1</th>
<th>Hrs needed-Month 2</th>
<th>Hrs needed-Month 3</th>
<th>Hrs needed-Month 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Librarian #1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Librarian #2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Staff member #1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Staff member #2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Student worker #1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Student worker #2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

8.4 PROJECT TIMELINE

It all comes together now in creating a project timeline, which is an idealized model of how the stages of the project will play out. A Gantt chart is one useful way to represent a project timeline.

As Figure 8 demonstrates, you update the percent complete column based on actual progress, as opposed to the idealized schedule for task completion. Chapter 10 shows how to calculate percent complete.

You can create a Gantt chart using Excel, Google sheets, one of the many templates available online, or in a project management platform such as Trello or Airtable.
### TIPS FOR MAKING A PROJECT TIMELINE

- If you have a firm final or interim deadline, try to work backwards from it.
  - To meet the deadline, what is the latest date the last task in the chain should start?
  - What is the latest date the previous task should end in order to “feed” the subsequent task so that it can finish on time?

- The timeline will be generalized. That is, while in reality you might want a staff member to spend one hour a day on a task component, the chart might show the hours bunched up in a five-hour block on Monday of each week.

- Be realistic about levels of staffing and work hours available each week.
  - Some staff may be involved in more than one map collection review task in any given week.

- Make time allowances for holidays, vacations, time at conferences, etc.

- You can use arrows or text above the timeline to indicate critical interim milestones.

- Get input and feedback from the other key players who don’t work for you but whose contributions will impact the project workflow.

---

**Figure 8.** A sample Gantt chart

<table>
<thead>
<tr>
<th>TASK NAME</th>
<th>START DATE</th>
<th>END DATE</th>
<th>TEAM MEMBER</th>
<th>PERCENT COMPLETE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flat map cases</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Thematic map review</td>
<td>1/14</td>
<td>4/16</td>
<td>Librarian</td>
<td>100%</td>
</tr>
<tr>
<td>Log maps in spreadsheet</td>
<td>1/22</td>
<td>4/23</td>
<td>Librarian</td>
<td>100%</td>
</tr>
<tr>
<td>Sort maps for cataloging</td>
<td>1/24</td>
<td>4/26</td>
<td>Student</td>
<td>80%</td>
</tr>
<tr>
<td>Reintegrate maps from cataloging</td>
<td>3/27</td>
<td>6/21</td>
<td>Staff &amp; Student</td>
<td>30%</td>
</tr>
<tr>
<td>Assess USGS topos for removal</td>
<td>1/14</td>
<td>2/4</td>
<td>Student</td>
<td>60%</td>
</tr>
<tr>
<td>Assess topos for other nations</td>
<td>4/8</td>
<td>6/12</td>
<td>Student</td>
<td>30%</td>
</tr>
<tr>
<td>Rearrange drawer contents</td>
<td>6/6</td>
<td>6/14</td>
<td>Staff &amp; Student</td>
<td>20%</td>
</tr>
<tr>
<td>Map Stacks review</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1st pass review</td>
<td>1/22</td>
<td>1/24</td>
<td>Staff</td>
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</tr>
<tr>
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</tr>
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</tr>
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</tr>
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<td>4/8</td>
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<td></td>
</tr>
<tr>
<td>Folded maps review</td>
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<td></td>
</tr>
<tr>
<td>Check for online presence</td>
<td>2/15</td>
<td>3/1/</td>
<td>Librarian</td>
<td>0%</td>
</tr>
<tr>
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<td>4/5</td>
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<td>Librarian</td>
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<td>Review media</td>
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<td>4/10</td>
<td>Staff</td>
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</tr>
<tr>
<td>Prep for move</td>
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<td>5/31</td>
<td>Staff</td>
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<th>WEEK 3</th>
<th>WEEK 4</th>
</tr>
</thead>
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<td>M</td>
<td>T</td>
</tr>
<tr>
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<td>Th</td>
</tr>
<tr>
<td>T</td>
<td>W</td>
<td>Th</td>
<td>F</td>
</tr>
</tbody>
</table>

**Figure 8.** A sample Gantt chart

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<td>5/31</td>
<td>Staff</td>
<td>0%</td>
</tr>
</tbody>
</table>
FINAL NOTES AND QUESTIONS ON PROJECT PLANNING

Notes on project planning:

Any related questions you need to consider or follow up on:

Next steps:
9: Working with Other Library Units

It’s Not Just about What Happens in the Map Collection

Although map collection reviews may on the surface seem like self-contained projects, they don’t happen in a vacuum. Others in the library will need to get involved.

Institutional contexts vary greatly. While this workbook can’t cover every aspect of every interaction that might arise with other library units, this chapter takes a high-level view of which interactions might benefit from some forethought.

In Chapter 2, you identified which library units would be involved or impacted by the map collection review. The units in this chapter were selected for discussion because your interactions with them are likely to be somewhat complicated, or new, or may involve aspects that could fall through the cracks otherwise.

TIP

For interactions with some of these units, consider whether and how to do the following:

- Set up a tracking system for items moving from one unit to the other.
- Set expectations on the size of batches being handled. (Or will items be transferred/processed in a steady trickle?)
- Determine the frequency for batches to be transferred, and a reasonable range of elapsed time for processing the batches.

HUMAN RESOURCES

You might need to interact with human resources if the project requires hiring staff, student or otherwise. The hiring process can take a significant chunk of your time in the early stages.

CATALOGING

You’ll be interacting with catalogers if retained items that were previously uncataloged will now be added to the catalog. You may also find items in the collection that even to the untrained eye appear to have been classified incorrectly (i.e., a call number is notably different from those of very similar maps).
Not all catalogers have been trained in map cataloging. The training may take days. Even experienced map catalogers will come to you with questions, such as “What should I put in the ___ field for this map?” This can be perplexing if you don’t know much about map cataloging! You may want to learn at least the basics. Barring that, you can ask the cataloger to explain what the dilemma is and what the options are, and make the most reasonable decision you can. Bookmarking a Marc record guide for maps may come in handy. Catalogers can also refer to Marc record templates for maps.

If the volume of maps to be cataloged is large and the in-house staff with appropriate expertise is small or non-existent, check with your supervisor about the feasibility of outsourcing some or all of the map cataloging. Backstage Library Works is one example of a company that can provide this service.

Of course, dealing with a contractor will add more to your management plate and will create additional expenses. Those factors will need to be weighed against the benefit of making your retained items more discoverable.

**DATABASE MANAGERS**

Job titles can vary, but these are the library staff members with expertise in querying the catalog to generate reports and spreadsheets that will be invaluable in reviewing circulating items, especially those on the shelves. (Refer to Chapter 6 for more tips regarding the spreadsheets.) The database manager may also be involved with batch-updating the records for items that are being moved from the map collection to a different section of the library, such as special collections or the stacks.

**COLLECTION MAINTENANCE**

Collection maintenance staffers may physically remove items that you have flagged for removal on a spreadsheet. They will also be involved in reshelving any items being moved to a different section of the library, and will likely be involved with the FDLP weeding process. Questions may arise for you in any of these processes.

**CONSERVATION/PRESERVATION**

The map collection review is an excellent opportunity to repair or encapsulate sheet maps, rehouse softcover reports and folded maps in beat-up envelopes, and so forth.

Your discussions with conservation/preservation might surface the following points.

- Encapsulation is not the same as lamination.
- You will probably be advised to remove maps with mold from the collection.
- At some point, consider whether there are shelved folded maps that might be more conveniently accessed if they were flattened and moved to the map cases. If so, discuss whether conservation/preservation would have the capacity to flatten the desired number of maps.
- You will probably be advised not to take repairs into your own hands by using everyday office tape. Conservation requires a different type of tape.

Also note that conservation/preservation staff may have input on best practices for packaging maps for shipping or relocation.

**FACILITIES**

Facilities will be involved if map cases, shelves, equipment, or furniture are being relocated or disposed. You may also coordinate with facilities staff on shipping (if applicable) and disposal of holdings.

**FINAL NOTES AND QUESTIONS ON WORKING WITH OTHER LIBRARY UNITS**

Notes on other library units:

Any related questions you need to consider or follow up on:

Next steps:
10: Making and Monitoring Progress

Get Going! And Assess How It’s Going

At this point, you know what needs to be done and have developed procedures and decision rules for getting it done. You also know how many workers you’ll need, how long you expect each task to take, and when each task is expected to start and finish.

Now it’s time to actually begin the review.

10.1 IN THE BEGINNING

Here are questions and considerations for when it’s time to dive in.

- Will patron access to the collection be restricted during the review? If so, is signage or other notification ready to go?
- Which items/tasks should you start with?
  - The smallest part of the collection?
  - The part that’s easiest to deal with (simplest decisions)?
  - The part with the biggest physical footprint?
  - The part for which needed helpers may/will have reduced availability later on?
  - The part with the longest elapsed time for completion?
    - This may involve starting with items that will keep workers busy as the items pass to later stages, similar to an assembly line.
  - Some combination of these?
- Regarding the sheet maps, does it make more sense to start at the beginning of the map drawers or the end?
  - This might be influenced by whether and how map cases are going to be resituated after the review. Is it certain that the first case (for example, containing call numbers starting with G3180 the Universe) will be flanked by a wall on the left side? If so, that case will likely be moved first, and you’d want to start the review there. If the last case (for example, G9800-G9804 Antarctica) will be flanked on the right side by a wall, you’d want to work backwards from there.
10.2 HOW’S IT GOING?

Congratulations—the review has been under way for a few weeks! How will you respond when a supervisor wants to hear about your progress? Assessing how a project is going takes a bit more work than assuming that you’re 20 percent finished one month into a five-month project, due to several factors.

- The real project won’t run exactly as planned.
- Progress won’t be evenly distributed throughout the elapsed time of the project.
  - Typically, momentum is slow in the beginning and picks up in the later stages.
- Progress is really measured by the percent of work accomplished, not by elapsed time or number of work hours expended.

In a map collection review, the project will be 100 percent complete when all maps in the collection (and all other items being reviewed) have made it to their destination, whether that’s back in the drawer/file/shelf or somewhere other than your collection.

During the first several weeks of the collection review, probably few or no items will have made it all the way through the process. Does that mean the project is 0 percent complete? No! Take credit for pushing some of the items through some of the processes.

Below is an example of how you might use progress on specific tasks to estimate what percent of the project has been completed.

In the worksheet “Total work-hours per task” (see Appendix A and section 8.1.1), you will have determined:

- the total number of units per task (the denominator for column (b) below).
- the total number of work-hours per task (the numerator for column (c)).
- the total number of work-hours for the whole review (the denominator for column (c)).

Adding up all of the task contributions to percent complete (the sum of the figures in column (d)) will give you the total percent complete to date. A blank version of this worksheet is found in Appendix A.

<table>
<thead>
<tr>
<th>Task</th>
<th>(a) Number of units processed in each task to date</th>
<th>(b) Percent of total units processed in each task (a) / total # of units = (b)</th>
<th>(c) Percent of total project work-hours this task represents: task work-hours / total work-hours = (c)</th>
<th>(d) Contribution to total percent complete (d) = (b) x (c)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task A</td>
<td>20</td>
<td>20/106 = 0.19</td>
<td>53/578 = 0.09</td>
<td>0.017 (1.7%)</td>
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<tr>
<td>Task B</td>
<td>7</td>
<td>7/525 = 0.13</td>
<td>525/578 = 0.91</td>
<td>0.012 (1.2%)</td>
</tr>
<tr>
<td>Total percent complete:</td>
<td></td>
<td></td>
<td></td>
<td>0.029 (2.9%)</td>
</tr>
</tbody>
</table>
10.3 THE 10 PERCENT ASSESSMENT

After the review gets underway, periodically reassess the procedures and rules, especially at or before the 10 percent completion mark for each of the major tasks (reviewing thematic maps, topographic maps, shelved items, etc.).

Why 10 percent? For one thing, by then you will have encountered a range of situations and questions. You’ll have an idea whether the rules and procedures established at the outset really work as is, or whether they might need to be adapted for certain items or circumstances. At the same time, you can still change course at the 10 percent mark without having to undo or redo overwhelming amounts of work.

Owing to this potential need to pivot, keep your options open during the early stages of conducting the review. For instance, instead of immediately disposing of maps slotted for removal, set them aside until you’re as sure as you’ll ever be that they can go.

Here are some questions to keep in mind during the early stages of the review.

- Are the processes flowing smoothly?
- Are there more questions or mistakes than I would have expected?
- If a task is taking much longer than planned, is there a way to streamline it without sacrificing quality?
- Are we taking too long to decide about things that are relatively inconsequential?
- What could be done to address any delays or mistakes arising from what the project partners are or aren’t doing?

FINAL NOTES AND QUESTIONS ON MAKING AND MONITORING PROGRESS

Notes on monitoring progress:

Any related questions you need to consider or follow up on:

Next steps:
Options for Items Not Being Retained

Map collection reviews are conducted with an expectation that there will be fewer items in the collection than there were before (although in rare, fortunate instances, a review might be conducted to make room for wonderful new material!).

Remember that catalog records must be updated for any cataloged items that are being relocated within the library or being removed from your library’s holdings. Make sure you understand who you need to work with on that, and what the preferred workflow is or will be.

TIP
Keeping a list of all items being removed from the collection—at least the cataloged ones—will be very important for library catalog maintenance.

TIP
For any item not being retained in the library’s collection, cataloged or not, rubber-stamping it as “Withdrawn” will lessen confusion if in the future someone sees the item elsewhere and attempts to return it to the library.

Below are some options for dispersing or disposing of items in the collection. Items being retained in the collection will be discussed in the next chapter.

11.1 DISPERSAL

An item that didn’t meet the criteria for remaining in your collection isn’t necessarily doomed to a trip to the dumpster.

11.1.1 Within the library

- **Special collections**: The map collection may contain gems of historic or local interest that would fit well in special collections. While planning or in the early stages of the review, engage with a decision-maker from this unit to establish what and how much they might be willing to absorb.
Government publications: Given that government agencies frequently publish maps as well as reports containing supplemental maps, there may be substantial duplication of holdings between the map collection and government documents or government publications (GovPubs).

Note that when there is duplication, you’ll probably be dealing with two sets of call numbers: the Library of Congress (LOC) call numbers in the map collection, and the Superintendent of Documents (SuDoc) call numbers in GovPubs.

General reference maps produced by the CIA are one common example of this. If such maps are in the map collection, they’ll be filed in the LOC G series (G3180 and up) according to region; in the SuDoc system, the numbers will all start with “PREX 3.10/4:” and maps will be filed alphabetically by place name.

Questions to discuss with someone from GovPubs include the following.

- If the library will retain only one copy of the item, should it be in the map collection or in GovPubs?
  - Does the answer depend on the item’s characteristics?
    - Condition (battered or like new)
    - Format
    - Usage statistics
    - Stamped as FDLP

- Would GovPubs take on government maps and reports not currently found in their section?
  - See also section 11.1.4, Depository items (FDLP).

The stacks:

- Could some of the atlases be integrated into the stacks, or into the reference section?

- Are there reports, theses, journals, books on geography or geographic information systems (GIS), etc. that may merit transferring to the general collection?

Here are some other alternatives to consider for keeping maps in the library.

- Makerspace: Colorful maps and maps with interesting patterns may be of interest as raw material for maker projects.

- Stress relief for students: Do some of the maps lend themselves to stress-relief activities during exams? (Examples: coloring, collages, or answering questions about features on the map.)

- Display: Perhaps a few maps of local interest or with interesting cartography could be displayed on a wall or on the side of a map cabinet.
Conducting a Map Collection Review

Library staff: Some of your colleagues may be eager to inherit maps that cover an area of significance to them or their family.

If your library has the capacity to do so, you might also consider scanning some of the maps to preserve them digitally before removing the printed sheets from your collection. This in itself is a significant undertaking that requires careful consideration and planning. The details are outside the scope of this publication, but some of the aspects that should be examined before scanning maps include existing digital availability at other institutions, parameters such as scan resolution and file size, creating appropriate metadata, and file storage and accessibility.

11.1.2 Within your institution

Interfacing with departments outside the library can be one of the stickiest aspects of the review process. It isn’t uncommon for faculty members to become upset when they learn that the library is removing items from its collection. Presenting the arguments about good collection stewardship may have little effect on their displeasure. Given the respect and affection cartographic materials inspire among map lovers, the library’s removal of maps can easily stir up a hornet’s nest.

In the planning stages of the review, hopefully your library administrators indicated how much transparency they felt would be wise. Depending on the boundaries the administrators have set, you may be able to do one or more of the following with the items being removed from the map collection.

- Giveaways to members of the geospatial community at your institution.
- Find a good home for items in an academic department’s library, or in a faculty member’s personal collection.
  - Faculty members may know of colleagues at other institutions who would be interested in inheriting the materials.
- Offer maps as raw material to the art department.
- The theater department may be interested in old bound volumes, globes, or other items as potential props.
- Campus offices such as international affairs might have an interest in certain maps and travel guides.

**TIP**

Items that have broad appeal include raised relief maps and bound copies of old *National Geographic* magazines

- If you are thinking about selling items, or holding a drawing where chances are sold, be sure to check whether your institution has rules preventing or restricting these activities.
- Find a good home for items in an academic department’s library, or in a faculty member’s personal collection.
  - Faculty members may know of colleagues at other institutions who would be interested in inheriting the materials.
- Offer maps as raw material to the art department.
- The theater department may be interested in old bound volumes, globes, or other items as potential props.
- Campus offices such as international affairs might have an interest in certain maps and travel guides.
11.3 Outside your institution

As applicable, consider offering maps to some of the following entities.

- local historical societies
- local map societies
- other local libraries
- government agencies and utilities that deal with land issues
- geography departments at academic institutions

11.4 Depository items (FDLP)

Especially for those of us without a library background, the Federal Depository Library Program (FDLP) is something of a black box.

If your map collection has items that came in through FDLP (look for a stamp on them indicating such; see section 6.6.3), you can find the guidelines and requirements for weeding these items from your collection here: https://www.fdlp.gov/guidance/weeding-depository-collection.

One or more library staff members—often in government documents or an equivalent department—should be experienced with FDLP disposal protocols as part of their job. They will be familiar with how to coordinate with your regional depository during this whole process to efficiently deaccession any FDLP items. You’ll want to understand the basic workflow on how FDLP items should be handled, and coordinate with all appropriate library staff on what is needed.

11.5 Needs and offers

Another dispersal possibility is to create a spreadsheet of items that are being withdrawn and offer the listed items to map librarians via MAPS-L or another relevant email listserv. Of course, clear this with your supervisor or library administrator before offering. In the email to the listserv, be sure to give a deadline for responses and indicate whether postage will be covered by your institution or theirs.

Compiling the spreadsheet and preparing for possible shipments takes additional time you may not have. And, since many libraries are also paring down their map collections, the number of takers for these offerings seems to be diminishing over time. This once standard practice appears to be waning, so it may be a dispersal method of last resort.

11.2 DISPOSAL

Chances are you won’t find an alternative use or happy home for many of the sheet maps and shelved items that are leaving your collection. You'll then face the task of disposal (and whatever neutral-to-negative emotions that evokes).

- Since collection maintenance staff are tasked with removing books and other items from the library, you’ll likely be working with them regarding shelved, cataloged items to be disposed of. At the outset, see if they have a preference for how you should indicate which items are to be removed.
Conducting a Map Collection Review

Your library may participate in a program that routes withdrawn items to underserved libraries. The items you’re removing could end up being appreciated elsewhere, even if you’re not involved in the rehoming.

- After being processed for removal from the online catalog, cataloged sheet maps might be disposed of by staff in cataloging and/or collection maintenance.

For maps with no record in the library catalog, disposal is probably a task you and your team will handle. (Here, “disposal” includes recycling, which is the preferred option whenever possible!)

**TIPS FOR YOUR CONSIDERATION**

- You might want to keep at least a rough count in a spreadsheet of how many maps are being disposed. Consider logging the call number range of each batch being disposed.
- Minimize trips to the dumpster; for instance, only go when you have at least one full library cart.
- Time your dumpster trips shortly before pickup and/or when few passersby are around.
  - Reason: Book dealers, faculty, staff, and community members sometimes make a habit of inspecting the contents of library dumpsters to find items to sell or cherish or to become outraged by what’s being discarded. Minimizing the length of time items are in the bins decreases the odds of their discovery by these individuals.
  - Someone in the facilities unit should be able to tell you the general timeframe for when trash/recycling is picked up.
- To avoid loose maps being visible inside the dumpster or fluttering around outside the dumpster on a breezy day, try the following.
  - For sheet maps, create a large roll wrapped with discarded Kraft paper or other blank paper and tape the roll.
  - For pamphlets, folded road maps, etc., bundle them inside discarded Kraft paper and tape the bundle.

**TIP**

Working from a spreadsheet is probably easier all around, as opposed to physically tagging or grouping the items.
FINAL NOTES AND QUESTIONS ON DISPERSE OR DISPOSE

Notes on dispersal and disposal:

Any related questions you need to consider or follow up on:

Next steps:
12: Decisions for the “Keepers”

Improve Conditions for the Remaining Maps and Their Users

A map collection review is a great opportunity to upgrade the “living conditions” of the maps that are being retained. Most of this chapter focuses on sheet maps.

12.1 MAPS

Here are some actions you might want to consider taking for the maps themselves.

- **Catalog the previously uncataloged items.** (See the discussion in Chapter 9).
- **Apply conservation measures to significantly damaged items.** (See section 12.2.)
- **Move unfiled or misfiled maps to their rightful place.**
- **Arrange for misclassified maps to be reclassified.** (Did you find a map of Iowa with a call number for Idaho?)
- **Rethink where index maps and other supplementary materials are kept.**
  - Here are some options for index maps.
    - Tape index maps to the Kraft folders containing the corresponding sheets in the series.
    - Keep all index maps together on a shelf for reference.
    - Oversized index maps can be kept on top of map cases, rolled and filed in a roll storage box, or folded and filed in a map case drawer.
  - And here are options for maps in the drawer that have companion reports, documentation, etc.
    - Keep the companion material on the shelf.
    - Create sturdy folders for the material and file them in the drawers with the maps.
- **Consider call number labels.**
  - For maps with call numbers handwritten in pencil or with inconsistent labeling (e.g., “MAPS” vs. “Map Coll” for location), is it worth the effort to print new, consistent labels?
  - What is the optimal label placement on a map?
    - What is the order of preference for alternate label locations if your first-choice label placement would obscure map data?
Consider how maps are filed.

- If a folded sheet map could fit in the drawer unfolded, should it be returned to the drawer unfolded?
- Do you always want maps to be filed face up and oriented for reading?
  - What if the call number would not be easily visible this way?
- Is there a preferred placement within a drawer for very small maps (e.g., those measuring 8 ½ x 11 inches)?

12.2 DAMAGED ITEMS

Here are questions to bring up with conservation/preservation regarding maps and other items that have significant damage.

- **What level of damage would trigger the item being sent to conservation?** It probably isn’t feasible to repair every single sheet map that has minor damage.
  - Here are potential guidelines.
    - Only repair tears extending beyond the map border into the map itself.
      - Formulate criteria for whether/when to repair tears along map folds (there will be a lot of those!) and small rips in the map interior.
    - Flatten and encapsulate crumpled maps, especially those printed on delicate paper.
- **What should be done about maps and reports with rusted staples?**
- **What should be done with maps and documents repaired in the past with cellophane tape that is now decaying?**
- **If some of the uncataloged maps that are being cataloged also need repair, establish the workflow: Should such maps go to cataloging first or to conservation first? Or will they need to bounce back and forth between units, depending on the situation?**
Maps being transferred to special collections may require encapsulation or other specialized processing before they go. What should the workflow be?

### 12.3 MAP FOLDERS, DRAWERS, AND CASES

Regardless of whether the collection will be moving or staying in place, most likely you’ll be doing some internal moving: reconfiguring folders and drawers, emptying some of the map cases entirely, etc.

When trying to figure out how many occupied drawers you’ll end up needing, it helps to have a figure for the average and the maximum number of maps in a folder and in a drawer. To that end, consider the following suggested guidelines for map drawer contents shared by Sierra Laddusaw, Scholarly Communication Librarian at the University of Arkansas – Fort Smith.*

- 200 sheets max in a 4 foot x 3 foot x 2 inch drawer, 50 sheets per folder
- If half sized sheets: 400 sheets (set side by side) max, 50 sheets per folder

  *where:*  
    - a non-folded, non-encapsulated map counts as 1 map
    - encapsulated maps count as 3 (2 sheets of plastic plus 1 map)
    - each fold in a map increases its count by 1 (a map folded in half counts for 2 maps)

**TIP**

It never hurts to have less than maximum capacity in a folder or drawer—this allows for ease of retrieval and room for growth.

12.3.1 Folders

The collection review is an opportunity to replace and reconfigure your folders.

- Replace badly damaged Kraft folders—over time they can rip, crumple, or become less rigid.
- Standardize the dimensions of full-sized and half-sized folders.
- Distribute the contents of overstuffed folders into new folders.
- Where a single folder harbors two stacks of maps side by side, would handling improve by creating a half-sized folder for each stack?
- Create folders where there were none—perhaps a long time ago, a map series was stuffed into a drawer without the benefit of a protective folder.
- Relabel poorly labeled folders or add missing labels to folders.
  - Folder labels typically include the call number or call number range and geographic location. For map series, some or all of the following may be included: map scale, publisher, series name, year(s) of publication, and map content.

* Email to the WAML listserv, July 9, 2020.
12.3.2 Drawers

- If you have damaged or missing interior drawer covers (with attached metal plan depressors), can they be fixed or replaced?

**FIGURE 10.** Half-sized map sheets in folders

**FIGURE 11.** A map drawer cover helps keep the maps or folders from getting caught as the drawer is opened and closed.
Are there are drawers that stick or fail to close properly? Since you’ll be freeing up drawers, you may be able to replace difficult drawers with ones that behave. The problem drawers can then be moved to a case that’s going to be discarded. Or, the drawers can be reassigned to either be empty for the foreseeable future, or to contain materials that are infrequently accessed.

You may need to relabel the drawers after contents have been shifted and consolidated.

- Wait until the end before creating permanent labels; you may need to modify drawer contents more than once before the review is completed.
- Further guidance regarding map drawer labels is found in Appendix C.

![Figure 12: Examples of map drawer labels](image)

### 12.3.3 Cases

Also referred to as map cabinets, map cases are large and heavy creatures. If the cases are going to be rearranged or moved to a new location, you’ll want to give considerable thought to the layout of the final footprint and how well it will function for users—map cases are not easy to move around, so it’s worth it to get it right the first time.

Many if not all of the map cases commonly used in libraries are stackable to different heights. Typically, one unit contains five drawers. Cases are usually composed of units stacked to include 10, 15, or 20 drawers (roughly 3 feet, 4 1/3 feet, and 5 ½ feet high, respectively).
FIGURE 13. The map case in the foreground contains 10 drawers, while those in the background were stacked to contain 15 drawers.

For each tall map case created you’ll have less footprint, which can be a plus. But you’ll also want to consider the following.

- If the cases are to be relocated to a floor in the building other than ground level, check with someone in facilities to ensure there are no load-bearing concerns.
- If at all possible, arrange for at least a few sets of adjacent cases stacked to be around 3 feet high. This will provide workspace and easy viewing for maps that are laid out.

It’s preferable for each map case to rest on a base. When rearranging, make sure you have a base for all of the cases in the new configuration.

- For instance, a shortfall in bases might occur if your envisioned final footprint includes fewer 20-drawer cabinets and more 10-drawer or 15-drawer cabinets than the current configuration.
Conducting a Map Collection Review

Other considerations:

- If you are reconfiguring the footprint of the map cases, in either the current or new location, allow for aisles that are about 5 to 6 feet wide between rows of cases. This will provide enough space for completely open drawers as well as room for the user to maneuver.

- Do you have map cases of different dimensions or quality? If so, consider rearranging your collection so that the cases of lowest quality or versatility are the ones to be discarded.

**TIP**

If possible, keep at least one empty drawer in each map cabinet. This will allow for expanding your holdings without having to shift all the subsequent map drawer contents.

- Typically, empty drawers are situated at the very top and/or the very bottom of a map case.
  - Keeping the bottom drawers empty decreases the chance of water damage to maps in the event of flooding due to weather events or plumbing mishaps.

12.4 MOVING

If map cases are being relocated to a different part of the library, you'd probably want to discuss the following points with coworkers in the facilities unit.

† Kathleen Weessies of Michigan State University Library in an email to the Maps-L listserv, October 19, 2022.
Cases can be moved more easily with the drawers removed. How should the drawers be labeled so the crew can easily reinsert them into the cases in the proper order?

Which map case should be moved first, and which last?
- Example: If the map case with the lowest call numbers is to be nestled into a corner with subsequent cases to adjoin it, the corner case should be prepped and moved first. The same logic applies if the case with the highest call numbers is to occupy a corner: Ready those drawers first and work backwards.

**TIP**
When readying the map cases to be moved, you may find that adjoining cases are bolted together internally. Some drawers may need to be removed from the adjacent map case in order to unbolt the first case from it.

Should the drawers be moved empty or with maps in them?
- If drawers are to be empty when moved, devise a system for labeling the removed contents so they can easily be reunited with the appropriate drawer.
- If drawers are to be moved with the maps inside, discuss means of safeguarding against maps accidentally sliding out.

**TIP**
Not all elevator doors open to the same width! Just because map case drawers can be carried horizontally into the elevator in your building doesn’t mean they’ll fit horizontally into an elevator in the destination building. (This may influence the decision whether to move the drawers empty or full.)

How will the maps be protected from the weather if the move happens on an inclement day?

**FINAL NOTES AND QUESTIONS ON DECISIONS FOR THE “KEEPERS”**

Notes on providing for the keepers:

Any related questions you need to consider or follow up on:

Next steps:
13: The (Almost) End

It’s Not Over Until It’s Over

That feeling when you’ve passed the 95 percent completion mark! You’ve had some surprises along the way: unanticipated circumstances that impeded progress, but also parts of the workflow that went more smoothly than expected or newly discovered shortcuts that saved time and effort. And now, your collection is leaner and less cluttered, containing maps and other items that you’ve determined to be of ongoing value to your patrons. Many items that didn’t meet the criteria for retention have moved on to other settings where they are to be valued. Having gone through the collection review, you have a better understanding of library processes, of the work done by individual colleagues—and perhaps most important, of the cartographic works under your stewardship.

Just a few more items to be processed, and then it'll all be done, right?

Well ... not quite, in all probability. In the weeks ahead, you might find yourself dealing with the following.

- **Straggler tasks.** Items or procedures that were less time-sensitive in the overall workflow may have been delayed to be addressed outside the collection review time window.
  - If you removed a lot of FDLP items, the required processes (and time-lags inherent in them) often take months.
  - Were there cataloged items that you couldn’t find? Now’s the time to search for them and find replacements for any that remain missing.

- **Cleaning up mistakes and oversights.**

- **Educating staff and patrons on new locations and procedures, verbally and in documentation.**
  - Some of the staff involved in the review may have moved on, and you will need to bring their replacement(s) up to speed on the current status.

- **Documentation.**
  - Do you and/or your supervisor want a final report to summarize the map collection review process?
  - Do you need to tidy up some of the recordkeeping, such as any spreadsheets you created that with a few tweaks could serve other purposes moving forward?
Do you want to share your hard-won knowledge with others by writing about your own map collection review experiences, or contributing insights for future editions of this workbook?

**FINAL NOTES AND QUESTIONS ON THE (ALMOST) END**

**Notes on straggler tasks:**

Any related questions you need to consider or follow up on:

If there are any next steps, list them here!

If the day has come when you can at last put this workbook aside: Congratulations! Hopefully your journey went well.

Please feel free to reach out to acrl@ala.org to provide feedback on possible additions or enhancements to the contents of this workbook.
Appendix A

Worksheets

From Chapter 1: Getting Started
Identifying the items involved

From Chapter 4: Explore the Collection
Sampling the collection

From Chapter 6: Establish Procedures
Task evaluation

From Chapter 8: Project Planning
Total work-hours per task

From Chapter 10: Making and Monitoring Progress
Percent Complete
MAP COLLECTION REVIEW - IDENTIFYING THE ITEMS INVOLVED

This is a list of items commonly found in map collections. Which types of items will your review involve?

Feel free to add or ignore items on the list as appropriate for your collection.

If you can, in the blanks provided add quantities of items [in whatever units that make sense].

- Maps in flat map cases ____________.
- Maps in cases; accompanying documentation is shelved ____________.
- Maps in vertical cases ____________.
- Maps in cases; accompanying documentation is shelved ____________.
- Rolled maps ____________.
- Index maps and other printed guidance (e.g., how to read a topographic map)
- Atlases - oversized ____________.
- Shelved: ____________.
  - Folded maps ____________.
  - Folded road maps and tourist maps ____________.
  - References (atlases, gazetteers) ____________.
  - Books ____________.
  - Journals ____________.
  - Dissertations and theses ____________.
  - Grey literature (gov't reports, conference proceedings, etc.) ____________.
  - Bound documents with supplemental maps in pockets ____________.
  - Other: ____________________________.
- Media: ____________.
  - CDs, DVDs ____________.
  - Microfiche ____________.
  - Other: ____________________________.
- Aerial photographs: ____________.
  - Individual 9" x 9" prints and transparencies ____________.
  - Individual prints and transparencies in other dimensions ____________.
  - Rolls of film stored on spools in canisters ____________.
  - Other: ____________________________.
- Globes ____________.
- Other: ____________.
MAP COLLECTION REVIEW - SAMPLING THE COLLECTION

Location in Collection: ___Flat map case ___Vertical case ___Rolled ___Shelved

Geographic area covered by sample: ________________________________

- For Topographic Maps:
  Scale: ____________________________.
  Date range: ____________________________.
  Estimated completeness of coverage:
  ____< 10%____10-35%____36-60%____61-85%____86-100%
  Is there a printed index map? ____Y _____ N _____Unsure
  If yes, where is it located in the collection? ________________________________.

- For Thematic Maps:

<table>
<thead>
<tr>
<th>Topic and location covered</th>
<th>Scale(s)</th>
<th>Date(s)</th>
<th>Depository? (look for a stamp)</th>
<th>Estimated % cataloged</th>
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Notes:
**MAP COLLECTION REVIEW - TASK EVALUATION**

Task Name: ___________________________

Unit for time estimates: ______# of minutes per ...

<table>
<thead>
<tr>
<th>Drawer</th>
<th>Folder</th>
<th>_____ Linear ft. of shelving</th>
<th>_____# of items</th>
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<tbody>
<tr>
<td></td>
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<td>_____# of spreadsheet rows</td>
<td>Other: __________</td>
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<thead>
<tr>
<th>Task Component</th>
<th>Who should perform?</th>
<th>Time /unit</th>
<th>Notes</th>
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*Total time/unit to complete task (to the quarter hour)*

Notes:

Notes:
### MAP COLLECTION REVIEW - TOTAL WORK-HOURS PER TASK

<table>
<thead>
<tr>
<th>Task</th>
<th>(a) Estimated time to complete per unit*</th>
<th>(b) Total number of units*</th>
<th>(c) Total work-hours needed to complete task</th>
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<td>(c) = (a) x (b)</td>
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</table>

Total work-hours for project:

* Units could be one drawer, X number of maps, X number of shelved items, etc.

Notes:
# MAP COLLECTION REVIEW - PERCENT COMPLETE

**DATE:** ________________

<table>
<thead>
<tr>
<th>Task</th>
<th>(a) Number of units processed in each task to date</th>
<th>(b) Percent of total units now processed in each task</th>
<th>(c) Percent of total project work-hours this task represents: task work-hours / total work-hours = (c)</th>
<th>(d) Contribution to total percent complete = (b) x (c)</th>
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<td>Total percent complete:</td>
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</tbody>
</table>

Total percent complete:
Use the following information from the “Total work-hours per task” worksheet:

- The total number of units per task (use as the denominator for column (b) here)
- The total number of task work-hours (use as the numerator for column (c) here)
- The total number of work-hours for the whole review (use as the denominator for column (c) here)

Because the values you calculate for column (c) will remain constant, you can fill them in on a blank worksheet that will become your master copy.

Notes:
Appendix B

Examples of Methodology Documents

DISPOSING OF INTERNATIONAL MAP SERIES

- Refer to the Map Case Map Series - AMS, GSGS etc.” sheet found in the “MCR by Location - Lists” folder.
- You’ll also be updating the Disposition log in the “Tracking” folder.
- Work through the spreadsheet from the bottom up.
- Your goal will be to remove from the map cases any map series that:
  - Has a “d” in Column J (“Fate per JR  d = dispose”)
  - Is highlighted in bright yellow
    - Some series are highlighted in a mustard brown color. I have pulled or will pull these for the History professor who would like to take these. You don’t need to pull them.
- When you come across a series that is flagged like this,
  - Refer to Column D (“Call #”)
  - Go to the appropriate drawer in the map cases to find the folder containing this series. Pull out the folder.
    - Sometimes there are similar series (e.g. same name and scale). Make sure you’ve got the right one!
    - Update Column K (“Removed from drawer”) with the date (e.g. 052319).
  - Count the number of sheets and record them in the Disposition log
    - You can write the tally on scratch paper if you want; this would make the most sense if it’s a small number of sheets, which can later be added up and placed on one line in the Disposition log. For series that have a lot of sheets, you can give them their own line in the log.
- When you have finished pulling all the “doomed” series in a drawer,
  - Put a red dot with a “C” on it if the drawer is now a good candidate for combining
  - Pull out the drawer name-card and plastic covering if the drawer is now empty
- At some point, tape up the map sheets to be disposed and send them on their way following the established protocol.
- The brown paper folders can be saved or used in disposal.
DISPOSING OF USGS TOPOGRAPHIC MAPS - ALL BUT AZ, CA, NV

**Background:** The US Geological Survey (USGS) has over time created topographic maps (or “topo maps”) covering the United States. There are series created at different scales. Some of the scales used in the earlier days were abandoned later. In at least one case, the scale was preserved but the layout and extent of the map changed in later years.

The standard modern map series are:

<table>
<thead>
<tr>
<th>Scale</th>
<th>Also Known As</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1:24,000</td>
<td><strong>7.5 minute</strong></td>
<td>these are the most detailed; one inch = 2,000 ft</td>
</tr>
<tr>
<td>1:62,500 or 1:63,360</td>
<td><strong>15 minute</strong> or inch to a mile</td>
<td>Some of these are regular topo maps; others are BLM Surface Management Maps. I suspect some have the depository stamp.</td>
</tr>
<tr>
<td>1:100,000</td>
<td></td>
<td>Least detailed.</td>
</tr>
<tr>
<td>1:250,000</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

In recent years the USGS has stopped printing these beloved maps. Instead, updated “born-digital” versions can be downloaded and printed from their website. Additionally, scans of earlier versions can be downloaded and printed from their website.

Therefore, we have no compelling reason to retain the topographic maps at large scales for most of the US in our collection. If a future patron needs one, we can print it out for them. We are going to dispose of the large majority of our topo map holdings.

We do want to keep the most recent versions of the 1:250,000 maps throughout the US, as these provide a quick overview at a regional-to-local scale.

We'll have a different approach (and different methodologies) for:

- Maps covering Riverside and San Bernardino Counties
- Maps covering California
- Maps covering Arizona and Nevada

The Map Collection Assistant has already gone through the drawers containing topo maps for most of the US. She has inventoried the number of sheets at each scale that we will be disposing, and placed an orange dot to the right on the outside of the drawers containing them. See the Topos to Remove document.

Your overall task will be to remove the topo maps at scales larger than 1:250,000.

- Proceed in sequence from the lowest call number. Go through all states *except AZ, CA, and NV.*
Remove the maps at scales larger than 1:100,000 and their folders from the drawer.
  - I don’t think any of these will have a UCR Library barcode or a depository stamp. You don’t have to look at every sheet for them, but if you happen to notice one, we need to treat that map sheet differently.
  - Make note of the numbers that the Map Collection Assistant wrote on the orange post-it notes. You can total these up to populate the “Quantity” column in the Disposition Log later.
  - Preserve and stockpile the sturdier folders. The less-sturdy folders can be disposed.

When you encounter maps at 1:100,000 ---
  - Do they look something like this?
  - or this?
  - If so, search for the depository stamp and/or UCR barcode
    - If the maps don’t look like that and are from the early 1900s, dispose of them
  - Do they have a UCR Library barcode? If so, we’re keeping them!
  - Do they have the depository stamp? If so, we need to keep them.
Exceptions:

» if there are multiple years, we only need to keep the most current year
  ◦ We can look at examples of where to find the date of publication or revision
  ◦ Write “superseded” next to the depository stamp and place the sheet in your disposal pile

» If there are duplicate copies of the most recent year, we only need to keep one (choose the one that’s in the best shape)
  ◦ Write “duplicate” next to the depository stamp and place the sheet in your disposal pile

  o Note that keeping some of the 1:100,000s may mean that you’ll have to adjust the number being disposed (as recorded on the orange Post-it) downward accordingly.

➢ When you encounter maps at scales between 1:100,000 and 1:250,000, dispose of them.

➢ When you encounter topo maps at 1:250,000 --
  o In general, we will be keeping one copy of each
    – if there are multiple years, we only need to keep the most current year
      ■ We can look at examples of where to find the date of publication or revision
        – If there are duplicate copies of the most recent year, we only need to keep one (choose the one that’s in the best shape)
  o I doubt any of these will have a barcode or a depository stamp. If you see either of these things, we might have to keep the sheet.

➢ Let me know if you encounter a series more recent than the 1960s that seems out of the ordinary. I’ll make a decision about its fate.

➢ Keep track of which drawers you have dealt with. For instance, you could print out the Topos to Remove document and check off the states you have completed.

➢ Dispose of maps at your convenience following our usual protocol.
Appendix C

Guidance for Map Drawer Labels

It is likely that you will need to relabel many if not all map case drawers once their contents have been consolidated and shifted. You can create a template for the labels by making a table in a Word document or similar word processing program.

For instance, you could use the following parameters in creating a template for map drawer labels that measure 5” x 1”. Refer to Figure 12 in Section 12.3.2 for examples of such labels.

- Make a 5” wide table with two columns. The first column is 1.65” wide. Do not display the vertical line separating the columns.
- Set two tab stops: one at 0.25” from the left edge and the second at 1.9”.
  - The first tab stop is for the call number range contained in the drawer.
  - The second tab stop is for listing the geographic location(s) and, if applicable, the map series and scale(s).
- Center the cursor vertically in each cell.
- Arial font 10.5 will work.
- Allow no more than 4 lines per cell/label.
- With default page margins, nine labels will fit on a page.

Save a master of the template. Make copies of the template, perhaps creating one multipage template document for each map case. Fill the cells with the information for the contents of each drawer.

Printing the labels on standard copier paper usually works well. Once the labels are cut to size, try sliding them into the map label holder on the appropriate drawer at the same time you’re sliding in the clear plastic label cover.

Expect to occasionally wrestle with crooked, torn, or crumpled labels!

Sometimes old labels resist being removed from their holders and small pieces remain stuck. You might want to try freeing these by pushing on them with a pencil eraser, using tweezers, etc.
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