INTRODUCTION
The Northern Regional Library Facility’s new addition is slated to open for use in April 2005. This will allow Doe Library’s Gardner Stacks, now functionally full, to resume shifting on-campus volumes off campus. Beginning now and each year in the future, Doe Library will need either to withdraw or shelve off campus as many volumes as we want to add to the Gardner Stacks.

Patricia Iannuzzi, AUL and Director for Doe/Moffitt Libraries, charged a working group to review and gather recommendations for NRLF shelving. The group included
- one faculty member, Mitch Breitwieser, Professor of English
- two selectors, Jan Carter, and Suzanne McMahon, and
- two members of Doe Circulation, Willyce Kim and Jonathan Thomas.

The group was convened by Gail Ford. The working group’s charge is included as Appendix A.

Items bound for NRLF can get there through a variety of paths. A workflow is included as Appendix B. Each shaded box is at least partially addressed by this report.

The group officially began their work on October 14, 2004. Members of DMSelect were consulted both in meetings and over e-mail during the process, as were staff members at NRLF, in the Systems Office, and in Technical Services.

During the course of these discussions, several questions were raised and answered. These are summarized in Appendix C.

Our recommendations for how to resume off-campus shelving are included below. In short, off-campus shelving decisions will be made by selectors using commonly shared principles and criteria (Appendix D.) The organizing principle for considering items for off-campus shelving is

"In general, very low use items will be shelved off campus, with some exceptions..."

We believe that the next year or two will look different from future years in that selectors this time around will be reviewing not only one year’s worth of transferable items, but rather a six-year backlog. They will also be reviewing materials differently given the reality of a functionally full Gardner Stack.
Recommendation 1: The Head of Research, Reference & Collections will act as the overall project coordinator, working with selectors and the Gardner Stacks Manager to implement the recommendations herein, including devising observation studies or other means to assess use of “library use only” materials in the stacks. We recommend that she also be responsible for assessing the project in one or two years, and for recommending changes that would move the Library into the next phase of routine review of materials for off-campus shelving.

Recommendation 2: The Stacks Manager will be responsible for working with NRLF to create a regular schedule of deliveries; hearing from selectors about candidates for storage; checking that items do not already exist at NRLF (or if they do, notifying selectors accordingly for next action); packaging items for NRLF and seeing that they are shipped; and ; tracking how many items are stored by LC call number range.

In the course of discussion, several issues and concerns were raised that seem important but fall outside our charge. These issues are included here as Appendix E.

As with all large projects, there are a number of related recommendations in this report and some suggestions about implementation. There are a number of Systems Office reports that would assist selectors in identifying both candidates and exceptions. Recommendations are summarized in Appendix F and those having imbedded requests for Systems Office are starred.

GOALS:
To create a process that
• results in equitable, meaningful, subject-based allotment of items to on-campus and off-campus shelving, with
• the least amount of effort by selectors and Doe Library circulation staffs, given
• these timeframes:
  □ By April 1, 2005, identify as many as 22,000 volumes for storage (this pro-rata figure provided by Scott Miller, 11/09/04)
  □ Beginning July 1, 2005, identify an average of 1,350 volumes for review each week, and package another 1,350 volumes (previously marked and reviewed) for storage. Stack Manager Willyce Kim will be responsible for keeping counts and organizing how work progresses (through the stacks, on schedule.)

Note: Moffitt and Art/History do not have individual storage allotments, and do not store directly. Items from these units are sometimes transferred back to the Gardner stacks, and are thus folded into Gardner stack review. SSEALS and PNM have their own allotments, but fall under the general guidelines and procedures set forth below.

FACULTY INPUT
• In the course of various reviews, faculty have requested that we preserve the browsability of high-use collections. In these areas it might be better to leave a higher percentage of apparently low-use items on the shelf. They report a chilling effect on browsing that occurs in areas of the stacks where there exists both high user traffic and compactors. Selectors will be mindful of user’s desire to browse as they evaluate their on-campus collections.

  Recommendation 3: Conduct observation and sweep studies in suspected high-use areas to help selectors judge how deep a collection to leave on-site.

• Selectors are encouraged to discuss off-campus shelving strategies with their faculty, especially as they change over time. For example, a selector might propose storing current issues of low-use print journals that are available electronically. Selectors are encouraged to poll all their faculty with these kinds of issues or work through departmental library committees, to ensure that different generations of faculty with different research styles are equally well-served.
Recommendation 4: Selectors will poll their faculty when initiating a new off-campus shelving strategy.

- As in all other aspects of collection management, faculty are encouraged to make individual recommendations and requests, which we will do our best to honor.

PROCESS:
We suggest that for most materials:
1. Systems Office provide information on usage by material type under review (for more information, see “Bang for the Buck”)
2. Subject selectors, in consultation with government documents and area studies librarians, review this information and decide what items should be moved to off-campus shelving. In making these choices, selectors will use mutually agreed-to criteria when considering their individual lists (see Appendix D)
3. Selectors indicate items that are to be moved to NRLF by marking the Systems Office information and giving it to the Stacks Manager.
4. The Stacks Manager supervises checking that candidates do not already exist at NRLF. If they do, the cards will be returned to the selector to consider their options at this point (reschedule on campus; withdraw; withdraw and ask to be a persistence partner on the item already at NRLF).
5. The Stacks Manager organizes paging, flagging for TOC, packaging, and shipping items to NRLF in keeping with Main’s allotment and a schedule for storage agreed to with NRLF staff. The Stacks Manager will also keep track of items stored by selector area, for feedback to the Head of Research, Reference & Collections.

There are a few exceptions to this process, as noted below.

BANG FOR THE BUCK: Types of materials and corresponding reports

Recommendation 5: Weighing several factors including available programming and expected payoff, we suggest the order set forth below be used when selectors review Gardner materials.

Recommendation 6: Several selectors expressed an interest in moving very soon and in advance of Systems Office reports, to manually mark items in the stacks for storage. The Stacks Manager will draft procedures for physically marking either monographs or serials volumes and will distribute these procedures to selectors by January 15.

1. Government Documents
The government documents collection that moved into Gardner did so after the Gardner Stack bar-coding project. Estimates are that 65-70% of this collection do not have barcodes, and therefore do not have a vol/cop in GLADIS. Many of these items are library-use-only and will not appear on early reports of usage.

Government documents librarians have already begun discussions about what areas in the H’s and J’s might go off-campus for shelving. Government documents librarians will work with the Stacks Manager to devise a simple and clear method to physically mark volumes. We suggest that this process begin immediately, and that these items be ready to ship in April 2005.

Note: Specific criteria have been suggested for government documents that should NOT go to off-campus shelving, irrespective of where they fall in the LC call number range. (see Appendix B, Criteria)

2. Monographs
Selectors requested that monographs be reviewed before serials. They also asked that particular thought be given to how we might identify and shelve together all volumes in multi-volume sets.
**Recommendation 7:** Identify low-use monographs shelved on campus. Systems Office is asked to create two sets of cards: 1 set for monographs with a loan code that allows them to circulate; a 2nd set for monographs that have a load code signaling “library use only”. Each set of cards should be grouped by “selector” (e.g., in LC call number order, with further refinement for area studies if possible.) We'd also like a count of how many cards appear in each set.

[Note: If the following criteria result in too many records being identified, or if the information requested below will not fit on a card, these particulars can be revisited.]

**Criteria:**
- owning location is MAIN
- item is shelved on-campus (not at NRLF)
- the record is not marked "missing", "withdrawn" or "on order"
- the item was added to GLADIS before 2002
- the item has not circulated since 1993

Information to appear on the cards, in this order:
- call number
- author
- title
- publisher
- date of publication
- date added to GLADIS
- copy
- language code
- country code
- bibrecnum
- barcode
- summary note
- also of interest would be any 5xx fields (notes), although space may not allow

**Low use monographs - SSEALS**
Systems is asked to create the same two reports, but for owning location = SSEALS

**Recommendation 8:** Identify multi-volume monographs that have inadvertently been split-shelved: some volumes on-campus and some off-campus. Systems is asked to create a list in LC Call number order.

3. **Serials**
Serials which already have partial runs shelved off-campus are logical candidates for review of volumes that have had no use during MAIN’s hiatus in NRLF shelving. It is also the case that some runs have inadvertently been split in illogical ways and that this issue might be addressed as well during a selector review of serials.

**Recommendation 9:** We suggest that a small group be charged to work with Systems to work through the vagaries of identifying and reporting serials information to support application of “usage” as a criteria and to identify the fields of data that would be the most helpful.

In particular, Systems Office is asked to create a card for each serial title now owned by Main and shelved on campus, for which part of its holdings are already shelved at NRLF. The cards should be sorted in LC call number order. We believe that serials would be usefully grouped into three
sets of cards, since both the data available and decisions will differ among groups a) in-library-use-only serials, b) serials without electronic counterpart, c) serials with electronic counterpart. Information to be included on the cards needs further discussion. Initial ideas include call number, title, holdings, indicator of what volumes are on-campus, an aggregate of the circulations experienced by all on-campus volumes in the title, the url for titles with electronic counterparts, and whether a title is active or ceased.

4. To NRLF upon an items initial receipt
Selectors who want to flag new items for shelving at NRLF immediately after Technical Services processing should do so. In the past, this has included foreign materials expected to be very low use that are considered too fragile for open stack storage.

**Recommendation 10:** Technical Services will continue to provide “Process for NRLF” flags to selectors who wish to flag items to go direct from T.S. processing to off-campus shelving.

**LC Call Number Analysis**
The above reports assume an item by item review. This seems the best we can do with data that is currently available. Some questions cannot easily be answered from this perspective (for example, “do individual subject areas in the stacks have a fair share of space?”)

**Recommendation 11:** Further develop programming that will enable analysis of items by LC call number. Some programming already exists at libadmin.berkeley.edu to do counts based on call number classification categories. The working group discovered however, when trying to use these reports, that the granularity of categories wasn’t useful to make RLF shelving decisions. (Note: this echoes a recent request by area studies selectors for improved LC Call number analysis for Title VI purposes.)

**OTHER WINDOWS**
It would be useful for selectors to see the following reports to help identify items that might be candidates for shelving off-campus (or weeding) even if they have had smatterings of circulation in the last five years.

**Recommendation 12:** Ask Systems Office to program these reports
- a list of monographs for which we have more than one copy on campus, together with their shelving locations and the number of times each copy has circulated in the last 5 years.
- a list of items shelved in D/M that are already duplicated at NRLF (whichever campus owns it) together with information on how often this item has circulated on campus in the last 5 years.
- Selectors perceive that there are some items now shelved off-campus that are in fact high use and would be best relocated to Gardner. To check this perception, we recommend that Systems create a list in call number order of MAIN items that have been circulated from NRLF to Berkeley more than five times in the last ten years. Systems is requested to give advice on whether it is possible to answer not only “how many times has this circulated,” but also “with what frequency over time?”
Appendix A: Charge to the Working Group

In Spring 2005 the Gardner stacks will be filled to capacity and NRLF 3 will open. For the first time since the Gardner stacks opened, Doe/Moffitt will be allowed to regularly shelve again at NRLF. Berkeley quotas have been increased and we will need to accommodate the approximate 80,000 new volumes received each year for the Gardner stacks. The new quota is also needed to alleviate greatly compacted stacks in several subject specialty libraries.

As selectors and circulation staff prepare for the ongoing storage of Gardner materials, it is timely to review and update procedures. Decisions and procedures about NRLF shelving should be based on principles and practices that are informed both by use of the material, and the integrity of collections. Our rationale should be based upon collection use, not shelving and shifting needs. Our procedures and decision-making process should be transparent to faculty.

The Doe/Moffitt NRLF Procedures Working Group is charged to review and update procedures for collection managers and Circulation staff. The Working Group should develop criteria for decision-making that includes:

- circulation of materials
- in-house use of materials
- high-use items now at NRLF
- types of materials best kept on campus due to issues of bibliographic control
- faculty concerns

The Working Group is charged to:

- Review and update the current procedures, taking into consideration the above criteria
- [http://www.lib.berkeley.edu/Staff/Admin/Accessstf/genstorg.html](http://www.lib.berkeley.edu/Staff/Admin/Accessstf/genstorg.html)
- Review existing methodology for decision-making by selectors
- Draft updated instructions for circulation staff
- Recommend data needed from systems (e.g. program listing all titles not circulated since…)
- Clarify the role of faculty in decision-making

As the Working Group conducts its work, it should review and consider:

- the recommendations from the Working Group on Access to Collections [http://www.lib.berkeley.edu/Staff/Admin/Accessstf/progress.html](http://www.lib.berkeley.edu/Staff/Admin/Accessstf/progress.html)
- data about proportions of the collection shelved at NRLF [http://www.lib.berkeley.edu/Staff/Admin/Accessstf/appE.xls](http://www.lib.berkeley.edu/Staff/Admin/Accessstf/appE.xls)
- circulation statistics for NRLF titles [http://libadmin.berkeley.edu/](http://libadmin.berkeley.edu/)
- new UC “persistence” policy regarding titles stored at NRLF [http://libraries.universityofcalifornia.edu/planning/RLF_Persistence_Policy.pdf](http://libraries.universityofcalifornia.edu/planning/RLF_Persistence_Policy.pdf)

The Working Group will be composed of members of Doe/Moffitt Libraries, including representation from Doe Circulation Services and collections managers. The Working Group will also ideally have two faculty members representing humanities and social sciences. It will also consult with staff in the Systems Office and NRLF as necessary. Recommendations should be vetted in Doe/Moffitt Selector meetings and the final report with recommendations should be submitted to AUL Patricia Iannuzzi by December 1, 2004.
APPENDIX B

Off-campus shelving workflow
(1/5/2005)

the shaded boxes are addressed in the working group report
Appendix C: Questions Asked and Answered

- Volume Equivalents (VEs)
  The NRLF allocations are based on “volume equivalents”. Each monographs and each bound volume of a serial are considered 1 volume equivalent — even if some volumes are very thin while others are very large. Other materials types, such as maps, microfilm, pamphlets, sound recordings, etc. have been assigned a partial volume equivalent estimated based on average shelf space needed. (For example, a map is “checked in” as .52083 of a volume equivalent.)

- Volumes added and off-campus shelving allotments
  ARL statistics indicate that Doe and Moffitt libraries (together) have added an average of 85,505 volumes per year. Doe has a current annual allocation from NRLF for 86,000 volume equivalents, although Library Administration is reserving 16,000 VEs, in the event that subject specialty libraries need extra storage. Doe’s annual target, therefore is at present 70,000 VEs per year. We assume that due to recent serious reductions in print subscriptions to online journals that our “volumes added” from bound serials will diminish over time, making the 70,000 VEs a workable “one-in, one-out” scenario.

- Use it or lose it
  Annual off-campus shelving allotments do not carry over from year to year, since they are based on the amount of workload the staff at NRLF can handle in a given twelve months. In order to make room for new volumes on campus we must move our full allotment to NRLF each year.

- Withdrawal in lieu of storage and Persistence
  Existing policy at the RLFs states that duplicate copies of an item may not be shelved at an RLF. A selector who identifies an item as being a good off-campus candidate but finds that its doppleganger is already at NRLF, must then decide to retain the item on campus or “withdraw it in lieu of storage.” Until recently many selectors were loath to withdraw an item on the assumption that the RLF copy would stay in RLF since there was no binding agreement with the depositing library to do so. Recently, the University Librarians have signed off on a “persistence” agreement, allowing a campus to become “co-owner” of the item at NRLF, thereby easing the decision to “withdraw in lieu of storage.” The policy is at http://libraries.universityofcalifornia.edu/planning/RLF_Persistence_Policy.pdf. Procedures have not yet been issued. Selectors may “withdraw in lieu of storage” items now, keeping a print copy of the record at issue – and may become “co-owner” of items retrospectively when procedures do arrive.

- User access to large sets
  Selectors have tended to keep on campus large sets they expect researchers will want to refer to in toto rather than as individual volumes. The comment was made that more could go to storage if there was an easier way to pull back sets for a week or two for on-campus use.

  Main Circulation reports, however, that they have a critical lack of storage space behind the circulation desk and would not be able to stage this kind of access.

  NRLF has several possible strategies for serving patrons wanting access to large sets, including staging volumes in the NRLF reading room for users who phone ahead, as well as informal methods to parcel out delivery of large sets to campus.
Appendix D: Principles and Criteria

Below are the principles and criteria that DMSelect members developed to use when identifying materials to consider for off-campus shelving.

Principles
- Subject ranges which are heavily used should be less heavily weeded, since browsing is more likely.
- Items with an online counterpart are often good candidates for off-campus shelving.
- Items of particular importance, as identified with input by faculty and students, will remain on campus.
- The subset of a given collection that is on campus should imply to the browser the depth and richness of the overall collection.
- Selectors will consider the condition or characteristics of individual artifacts, and those rare, fragile, or extremely expensive items will be shelved with their protection in mind.
- The Gardner Stacks has a current capacity to hold 2,300,000 volumes. Best practice stack maintenance guidelines suggest that 1,920,000 volumes would be a good functional maximum. On-campus vs. off-campus shelving decisions must occur within this physical reality.

Criteria
In general, very low use items will be shelved off campus, with some exceptions, discussed below. Use in this regard includes initial circulations and in-library use.

Monographs
- low use multi-volume monographs are candidates for off-campus shelving only if they can be easily found using catalog search strategies.
- multi-volume monographs should never be shelved in more than one location, i.e., all volumes should be shelved on- or off-campus.

Serials
- this serial title is print only -- retain the last 10 years on campus.
- this serial now has an online counterpart -- move current volumes back through xx/xxxx to off-campus shelving.

Government Documents
- Most U.S. Congressional publications (but bills can be shelved off campus)
- California legislative publications
- British parliamentary publications
- Censuses -- all countries, all kinds
- Statistical yearbooks/abstracts
- government organizational manuals, blue books, etc.

Other materials types. Retain on campus
- dictionaries
- encyclopedias
- anthologies
- bibliographies, lists, indexes, etc. (a separate index to a serial should not be stored, even if the serial itself is in NRLF.)
- reference materials
- items that are difficult to find using the catalog, e.g., publications of academies and institutes in LC class AS which often include unanalyzed book-length publications.
- items that are difficult to circulate from NRLF, e.g. they are part of very large sets.
Appendix E: Related Issues and Ideas

Issues raised, but outside our purview:

- Should the baseline allocation of space within the Gardner stacks be reviewed and modified to reflect density of collections and on-site use? (e.g., philosophy is a very high traffic area but there is no shelf space to shift into on either side.)

- Should DMSelect discuss shared guidelines for making outright withdrawals?

- Should there be further librarywide discussion about the proper shelving locations for both CJK and other foreign language materials? Different selectors hold different beliefs and opinions.

- The reports at libadmin.berkeley.edu show a number of GLADIS records for items that do not have standard LC Call Numbers. At least in some cases, these numbers may indicate problems in catalog records that need clean-up.

<p>| Data as of July 1, 2004 (per libadmin.berkeley.edu) |</p>
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<th>Call Number Range</th>
<th>Volumes on campus</th>
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<td>EAL style call numbers</td>
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<td>5</td>
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<td><strong>376,870</strong></td>
</tr>
</tbody>
</table>

- Table of Contents project at NRLF
  One obstacle to moving some items from on-campus to off-campus shelving is the difficulty of finding them again using the catalogs. As one way to improve access, UC Berkeley Library began a pilot project to test the feasibility of making tables of contents for items in storage visible over the web from a link within the catalog record. At the time of this writing, over 7,000 records were so linked. This project is funded for a limited number of years. View a sample at http://metsviewer.lib.berkeley.edu/nrlftoc/mets/167916832H-C3111817.xml . If this project goes forward after its initial pilot phase, it seems as though it could naturally fold into the NRLF workflow.

- During the course of developing this report, both on-campus and NRLF staff suggested that the Library might charge a group to discuss ways and means for making off-campus items easier to find using the catalog.
Appendix F: Recommendations (Items with Systems Office ramifications are starred)

Recommendation 1: The Head of Research, Reference & Collections will act as the overall project coordinator, working with selectors and the Gardner Stacks Manager to implement the recommendations herein, including devising observation studies or other means to assess use of “library use only only” materials in the stacks. We recommend that she also be responsible for assessing the project in one or two years, and for recommending changes that would move the Library into the next phase of routine review of materials for off-campus shelving.

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Recommendation 5: Weighing several factors including available programming and expected payoff, we suggest the order set forth below be used when selectors review Gardner materials.

   - Government Documents in the H’s and J’s
   - Monographs
   - Serials already partially shelved at NRLF
   - Other serials

Recommendation 6: Several selectors expressed an interest in moving soon to manually mark items in the stacks for storage. The Stacks Manager will draft procedures for physically marking either monographs or serials volumes and will distribute these to selectors by January 1.

* Recommendation 7: Identify low-use monographs. Systems Office is asked to create two sets of cards: 1 set for monographs with a loan code that allows them to circulate; a 2nd set for monographs that have a load code signalling “library use only only”. Each set of cards should be grouped by “selector” (e.g., in LC call number order, with further refinement for area studies if possible.) We’d also like a count of how many cards appear in each set. (Specifications are included in the body of this report.)

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number. Some programming already exists at libadmin.berkeley.edu to do counts based on call number
classification categories. The working group discovered however, when trying to use these reports, that
the granularity of categories wasn’t useful to make RLF shelving decisions. (Note: this echoes a recent
request by area studies selectors for improved LC Call number analysis for Title VI purposes.)

* **Recommendation 12:** Ask Systems Office to schedule these reports for future development.
  - a list of monographs for which we have more than one copy on campus, together with their shelving
    locations and the number of times each copy has circulated in the last 5 years.
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