Serials Education or How to Nail Jelly to the Wall

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The number of serials, their types and their subject coverage is so diverse, continues to grow, and shows little sign of slackening, despite the recession which has hit many countries. But the amount of money which is available to purchase serials is forcing a reappraisal

a) by the librarian as to what to take (or not to take)
b) by the publisher as to a journal's economic viability or its form in the future.

Because serials appear in so many forms, we are left wondering what a serial really is.

Consequently any starting point should ideally be with a definition but on consulting the literature, even these can be of little help due to their variety and opinion - so the AACR 2 says "a publication issued in successive parts bearing numerical or chronological designations and intended to be continued indefinitely" and again the Science Reference Library "Anything is a serial unless proved otherwise." Those two definitions alone are sufficient cause for some form of education but given the quotation from an American source that controlling serials "is like trying to nail jelly to the wall," we have two areas, serial by form and their related problems of control which, when linked, provide adequate justification for a course in serials and their administration.

Education and training tend to be, in many peoples eyes, inextricably mixed, are often used together, and no second thought is given to their inherent problems. I believe that quite separate considerations are involved.

a) Full time and/or part time education, which is now more or less the sole prerogative of the library schools
b) In house and/or on-the-job training, which may vary in extent dependent on time, expertise and frankly ability or interest.
c) Refresher and/or follow up courses which may involve any one person or organisation whose thoroughness will vary according to their own knowledge, background or interpretation. So large library authorities may offer some form of courses to staff, or a consortium may do so, or a variety of professional organisations may take responsibility. Either way there is no uniformity or co-ordination.

The main problem is to link theory and practice and here is the justification for education.
Formal Education

Over the last fifteen years the Library Association has gradually opted out of its examining function and completes this withdrawal in 1985. However it will continue to act as a validating body for UK library schools, graduates from which will not be able to style themselves Chartered Librarians without the necessary prior approval of their course. Currently then the following professional awards are made in the UK:

a) Degrees, awarded by a University as a result of a three or four year undergraduate, or one year post graduate course.

b) Degrees awarded by Polytechnics to a syllabus approved by the Committee for National Academic Awards (CNAA).

c) Diploma in Higher Education (Dip HE) which, in itself is a technicians level qualification but offers a degree of flexibility to students who

1) may obtain a basic ALA (Associateship of the Library Association) after the necessary practical experience

2) may convert their award after a further year at a University or Polytechnic to a degree

3) may return for that purpose at a later stage.

Additionally related subjects such as information science at some institutions and at others low level courses and attendant qualifications are offered to syllabi approved by the Business Education Council (BEC).

Serials Education

Education for all aspects of serials control is inferior to that for books and other literature and the number of students that eventually seek jobs in public libraries may play some part in this and may in turn influence the policy of Heads of Schools. But what is evident is that many librarians move into the world of serials having had no, or very little, contact with them and, quite frankly, being basically ignorant of the many problems that can beset the unwary. In the vast majority of cases aspects bibliographical have been dealt with in library schools at the expense of aspects organisational. Most are therefore not geared to operate courses, or sections of courses, which treat forms of literature. In fact almost everything but can be discovered:- writing/editing, public relations, psychology of reading etc.

So, what of serials? Until this year the Loughborough School has been the only one to treat serials seriously and to have a separate option treating all aspects as an integrated whole. However it has recently been announced that College of Librarianship Wales is to offer a "Degree of Master of Arts in Periodical Studies" but on closer examination this is not what it appears but "a taught programme on the Periodical Press in Britain 1580-1900"! It is not therefore a competitor to the Loughborough course whose syllabus briefly covers the following broad areas:-
Definition/Terminology

Discussion/argument as to what falls into the category of 'serial' plus coverage of well known terms in this area.

Types of Serial

Some categorisation is attempted and a discussion is instituted into the various bibliographical problems which may beset the unwary librarian in order to destroy any false sense of security.

History

Although not of vital importance a feeling of the historical base is provided in order to place the serial in perspective and to enable the student to obtain a realisation of its beginnings together with its developments and the contiguous economic and social conditions leading to the diverse types of serial found today.

Printing/publishing

Not only do we attempt to give knowledge of the production process and problems associated with the literature we handle without usually a second thought, but also how to go about assembling the material before production: copy preparation, refereeing, space allocation, design, choice of paper and type face, printing, proof reading. After all many librarians are involved in the production of publications like house journals or have some honorary posts in private life requiring such a knowledge. Associated problems of copyright are also covered at this stage.

Selection and handling

The art of selection, core journal identification and related topics are broached, continuing to a survey of the part played by the literature and a requirement of detailed knowledge of it - texts, journals on serials, directories, and other services. Parallel with this, and in the natural flow of events, a detailed coverage of the work of agents, their advantages and disadvantages is attempted. Thereafter reference is made to receipt recording, manual and automated, and the subsequent problems of housing, binding, relegation, and de-acquisition.

Bibliographical Control

Some believe that this should be included in the previous section. We think otherwise. We define this as the expertise required to document and adequately disseminate information in its various forms as contained in the literature - classification, abstracting, indexing, current awareness services (manual and mechanised), information publications etc. Bibliometrics, the science of applying, bibliographical techniques to the measurement of interest areas, is undertaken. In passing I might say that cataloguing per se is given only brief coverage. Incidentally I wonder whether cataloguing in the sense that it is used with serials is a misnomer as much of the data is, in fact, included in serial housekeeping records? Finally the pros and
cons of standardisation and the various forms affecting manual and mechanised techniques. I have not, until now, mentioned my co-lecturer Stella Keenan. In fact she shares the syllabus with me throughout but at this point comes into her own.

Machine-based services

The aim is to familiarise with in house, national and international systems with 'hands on' experience if possible.

Ancillary course work

Visits

Because of the complexity of parts of the subject, integral visits are made to - a printing firm, a bindery, and an agent.

Assessed course work/examination

Our examining structure requires that a percentage of marks is obtained from course work, the remainder from one three hour examination. In this option three pieces are given with strict deadline dates and mark ratings.

So much for Loughborough, and other UK schools' practice. As far as I have been able to ascertain only the University of Drexel Library School has a comparable course.

British Library Project

I have long had the suspicion in this area of librarianship and information work that many of our senior librarians, and in our schools, many Heads, could well be given the accolade of "literary luddite". Their lack of ability to recognise the peculiar problems of this area of librarianship is, quite frankly, beyond belief and reminiscent of some of the decisions so much lacking in foresight years ago which led to the formation of Aslib, Institute of Information Scientists, and even the UK Serials Group.

So while our senior librarians fiddled the problems of serials multiplied very much like the sorcerers apprentice found to his cost. At the same time a variety of reasons were given for maintaining the status quo in our schools and libraries with the hope that the problem would go away!

In order to investigate my suspicions further, because of the growth in the importance/amount of serial literature over the years, because of the increasing tendency for staff to specialise, and because there appeared to be inconsistency in the coverage of serials in our schools (or almost lack of it) the British Library (BL) made a small grant to enable an investigation to be mounted into the current position and to discover whether the customer was getting what he wanted. The brief was, in the main, to concentrate on UK practice from two aspects -

a) how do our library schools treat serials in their syllabi

b) what provision do libraries make for serials, their organisation and administration, and what views have they, the practitioners, of various related aspects of their work.
In this way the findings of the two sections would throw light onto:

a) current state of thinking in both schools and libraries
b) current state of relevance of teaching to practice.

The Survey

Two questionnaires were constructed, one aimed at the schools and the other at a cross section of libraries - public, special and academic. In both cases small, random, representative samples were sent abroad.

That sent to Library Schools was aimed at revealing information on:

- Staff involvement
- Taught areas/time allocated
- Associated academic work
- Existence of short courses
- Awareness of the UK Serials Group (UKSG)
- Future intentions towards serials education
- General comments

and that to libraries hoped to obtain information on:

- Staffs employed in serials - job titles, salaries, qualifications, time in post
- Budget allocations
- Existence of in house training for sub-professionals
- Suggestions for future courses
- Awareness of the UK Serials Group
- Comment on the published literature and its deficiencies
- General Comments

Findings

At this time any findings are preliminary, for completed questionnaires are still being received.

Library Schools

Staff Involvement

It soon became apparent that diversification of teaching made it impossible to state staff numbers involved. Sufficient to say that coverage was so diverse as to make co-ordination and consistency impossible to monitor.

There was a reluctance to recognise the importance of serial literature in the current information scene, although one school suggested that "we are far too pre-occupied by forms of material and really need to address ourselves to information". In fact forms of material are little covered in any school and to address ourselves to the information aspects surely needs a thorough understanding of form! However, as if to contradict this, another school claimed "we have never taken the view that a particular form of material should be the basis of separate librarianship". I suppose the logical answer to all this is that the existence and success of the UKSG, the variety of
courses, now being run on aspects serial, and even this conference, is evidence of the continuing importance of a form, this form, of literature. Other replies showed only too clearly how sadly lacking is their understanding.

Taught areas

Teaching of serials was integrated in many different ways, so many in fact that any co-ordinated approach was impossible to discern. The amount of time spent in teaching serials aspects also varied considerably but was never more than a very few hours overall. However to a question as to whether respondents considered this sufficient, a majority thought that it was not, but gave course congestion, and structures of the syllabus as reasons for the state of affairs.

Additional to lectures, two classes of associated work were identified - course assessed and visits. By far the largest number reported no visits in this connection, whilst those who did visited libraries, or firms, for specific narrow reasons, such as to see an automated system. No attempt was made to arrange visits in order that an overall perspective could be obtained. Again there were a number of replies indicating that no assessed work was required from students, although the topics that were assigned in some schools were again extremely varied ranging from "reference exercises" to "practical cataloguing".

As far as the future was concerned, only one school positively reported that it was planning to offer a serials option in its revised degree course, in addition to extended coverage in existing courses. Despite the grim immediate prospects, slight glimmers of hope can be determined from the comments made by a number of schools - "given the demand, continuing education courses will be provided", "there is clearly room for considerable improvement in training". In fairness there were others of a mysterious nature - "very important for school librarianship", and "is there a paying market at present?"

Short Courses

This question was aimed to obtain information about short course involvement by schools and to co-relate this with knowledge of the UKSG and its activities and stated requests for courses as revealed in the returns. Thus a market could be determined which could be of assistance both to schools and the UKSG in planning future schedules. However once again the majority of schools appeared not to be involved and had no intention of becoming so. This was in stark contrast to the stated demands from libraries as will be seen later. An identical situation was evident in those foreign schools which have reported so far.

So, as far as the library schools are concerned the outlook is not good and standards of coverage look like continuing at a low level. The present state of syllabi clearly reflects local individual opinion and attitudes, although blame is placed on external bodies on occasions, perhaps as a scapegoat. For instance the CNAA is blamed, although I understand that its attitude is now much more flexible as reflected in the new course which is to be introduced as already mentioned.
Now let us take a look at replies from libraries - what are their views, are they getting the right people, or have they the prospect of doing so, from our educating institutions.

Libraries

This questionnaire was designed to:-

a) find out something of staffs in post, the time they've been there and their salaries
b) discover if they regarded certain named categories of literature as 'serial'
c) discover the extent of any specialist education and training to equip them for their present position, and any related views on its necessity.

with the aim of:-

a) assessing current state of education and training
b) gaining opinions of areas needing coverage
c) correlating those expressed needs from the education given in schools
d) assessing the awareness of the UKSG and its activities
e) obtaining any other relevant data.

Staffing

Not surprisingly there was no standard job title (although a serials librarian per se was more often found in academic libraries than elsewhere), neither was there any correlation between salary and type of library, post holders being almost equally divided into the following three salary scales - £5-7000, £7-10,000, in excess of £10,000. Again it transpired that more staff members in academic libraries than elsewhere were concerned wholly with serials, rather than having to divide their time with other duties. Almost three times as many post holders had a degree and professional qualifications, than those who had a professional qualification only.

To those questions aimed at throwing some light onto the educational programmes at school respondents generated pointed comments, but in summary

a) in a large majority of cases a few hours in toto was allocated to serials rather than a more lengthy period which would allow for more concerted treatment of the subject
b) to a question aimed at discovering any treatment bias at school concentration appeared to have been on bibliographical aspects, indexing and abstracting, and cataloguing, with much less attention being given to what can be called housekeeping - acquisition methods, agents, automation etc.
c) related questions asking opinions as to which areas were NOT adequately covered revealed, in order of occurrence - acquisition methods, selection, management aspects, 'all areas' (viz), practical exploitation etc. In other words the 'basics'.
d) finally those areas treated at school which was felt to have helped the post holder in their duties revealed - 'knowledge that serials were never straight forward', reference work, use of agents, 'none helped' (viz). A few
cogent comments were also made, two of which were -

"I don't think library school taught me much of practical use"

"None of it was ever mentioned on my course".

As for time in post, over half the respondents had occupied their position for a period of three years or less, with the remainder in periods ranging to over ten years.

Budgets

This question unfortunately was answered in various ways but after analysis of those useful replies the average spent on serials in

Special libraries was 58.25p
Academic libraries was 40.5p
(Average 49.37p)

In this latter field it was noticeable that non-university and polytechnic libraries reported a significantly smaller periodical percentage.

Management aspects

The general idea with a succession of questions in this context was to discover areas of work with serials falling under the control of the serials librarian, whether any supporting staff were involved, and to obtain some idea of the diverse treatment of certain categories of fringe information.

Very few librarians had complete overall responsibility for serials but many had one or a combination of the following duties to perform - staff supervision, acquisition, binding, automation, reference, selection, display, cataloguing, current awareness, in that order of importance. It was difficult to determine whether supporting staff were employed whole or part time in serials work but the greatest number of staff in serials sections appeared to be overwhelmingly in the 1-5 category, eight times as many as in the 5-10, or over 10 categories.

In addition to the quoted areas of responsibility certain other duties were specifically quoted which one would have thought would have been quite obviously under the librarians control, but apparently not so - finance, exchange, circulation, back issues, renewals.

In the case of fringe literature a very diverse set of views emerged as to the interpretation as serial of a number of named categories. Most appeared to treat government publications as serial, with declining numbers so treating reports, conference proceedings and standards. Some very peculiar types of literature additional to the above were reported as being treated as serial - examination papers, legal encyclopedias, telephone directories etc. This again, I think, underlines the problem - such a wide variation of interpretation, with no accepted standardised treatment.

Only about one third of serials librarians admitted to any form of training or education to equip them for their day to day...
tasks, by far the greatest number of these saying that their training had been in-service, sometimes of doubtful calibre. However, on the other hand, of the two thirds who had had no training, a large majority considered that some previous education and training would have helped them to improve their day to day efficiency.

Short Courses

An attempt was made to discover:-

1) the extent of participation in short courses by both professional and non-professional staff
2) the existence of in-service training
3) suggested topics for future courses
4) preferences for locations of courses.

Almost twice as many professional members of staff reported that they had participated in one or more short courses run either by the UKSG, LA, Aslib, BILD, Circle of State Librarians, or SCONUL, their preferences being for a national rather than local location. A very large majority considered such courses to be an important part of professional life - in fact only two thought otherwise. Suggested topics for short courses were:- automation (by far the majority), current trends, standardisation, agents services, finance, exchange of experience meetings, reader education, classification and cataloguing, AACR 2, European documentation.

There is a considerable body of non-professional (ie. clerical or semi-professional) staff employed in the day to day administration of the serials collection. It became apparent during the early courses run by the UKSG that a latent demand existed for improving basic knowledge and, in so doing, obtaining the chance of meeting their counterparts in other libraries. Equal numbers reported that they either did, or did not, run in house training/induction courses, mainly of two types - general introductions to the whole system or on-the-job departmental training. Similarly an almost equal number of respondents thought this provision sufficient. However of those suggesting it was not so there was unanimity that non-professionals should receive training. Questions referring to subjects also attempted to obtain preferences for place, duration, and topic. With one exception all chose in-house or local venues, rather than having to despatch staff to distant parts with no doubt consequent extra costs involved and disruption to the service. Suggested topics were:- housekeeping routines (by far the majority), definition of serials, supply sources, bibliography, binding, automation etc. The majority preferred one, or at most two day, sessions.

Literature of the subject

Some indication was considered necessary as to whether existing writings were considered adequate. In general there was disagreement, some saying that there was adequate coverage, some the opposite, and some saying too much. A number criticised the American bias of available material, others stressed the individuality of local practice and doubted its value, some had no time to read. BUT the following suggestions for further works emerged:- day to day management manual, handling of micro-
forms, junior procedure manual, agents and back issue dealers, case study collections of UK libraries etc.

On-line

In general just over half the libraries reported some form of system in use, the rest saying quite categorically that they were not even considering it. Of the whole sample some 50% considered that they had been inadequately prepared to make a decision one way or the other. Various data bases were reported as either available or under consideration, in addition to those in-house housekeeping systems with shared, or sole, access.

Some few final comments are worth quoting, from the many contributed, in order to underline the continuing importance of education and related activities:-

"Serials librarians are gradually becoming recognised as a special professional group and the UKSG is helping in this."

"Serials librarianship needs promotion to non-believers"

"Better teaching is required in library schools"

"Serials are an expensive and inefficient form of communication. Perhaps we should be researching into finding a new and better form of communication - indeed a reformation of the whole structure of serial publishing. What then for education for serials librarians - do they merge with information officers?"

So at the end of this interim survey a number of points can be made:--

1) There is a continuing diversity of opinion, perhaps based on parochial attitudes, as to what constitutes a serial.
2) Formal education is patchy, as is on-the-job training. Most pick up expertise as they go along.
3) There is a very clear demand for short courses.
4) There is an abundance of comment throughout requesting better education.
5) It does appear that library schools are, in general, with one or two exceptions, out of step with the needs of libraries.

Although this survey has been reporting primarily on UK practice sufficient information has been gleaned to make it clear that the situation in other countries is similar.

Education is an intangible thing and can be a continuing process in very many ways - one of which is to provide a forum for all interested parties to exchange views and to understand each others points of view. So, in 1978, the UK Serials Group was established. Since then it has gone from strength to strength and has admitted an increasing number of foreign libraries into membership. Not only are librarians, from all types of library, members, but also information workers, publishers, agents and binders and the value of our various activities has now been well and truly proved, so much so that numbers at our annual conference increase each year, as do the number of participating exhibitors. I would commend this type of group to other countries. In fact there is interest already in America and the
Nordic region. Some form of Federation may then be possible in order to jointly consider problems of the moment.

Education is a long and arduous task but hopefully we will convince the doubters of the value of at least serials education in due course of time.