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Group Therapy -- To Check-In or Not to Check-In

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**GROUPS:** Submitted by Rick Anderson (Director of Resource Acquisition, University of Nevada, Reno Libraries)

Since we eliminated routine periodic check-in at my library, I’ve heard from others who have been considering doing the same thing. If there are libraries that have done so (or taken significant steps in that direction), could you tell us what your experience has been? Has it worked better or worse than expected, and have there been unforeseen consequences — either for good or ill? Did it lead to any other changes that you might not have otherwise made in your processes and practices?

**RESPONSE:** Submitted by Daniel M. Dollar (Associate Director, Collection Development and Management Cushing/Whitney Medical Library Yale University)

For 2006, we implemented reduced journal check-in at the Cushing/Whitney Medical Library. We created a core list of 189 leading biomedical and basic science journals to retain in print with check-in, binding, and claiming. These journals were derived from Abridged Index Medicus, ISI Impact Factors, the now-defunct Brandon-Hill list of medical journals and with faculty input. In addition to the core list, we continue to check in 40 history of science and medicine journals received by our Historical Library, and a small number of information science journals routed to our staff. (I hope to eliminate most routed journals this year; with email and RSS alerting services there should be less need for routing, especially since it can take months for the typical issue to make the rounds.)

Outside of the core list, we continue to receive 137 journals with no online equivalent or where the online access does not meet our guidelines. An example would be online access only available via a full-text aggregation (i.e., EBSCOHost Academic Search Premier), where content is not part of a subscription and can be pulled without warning. These “print only” journals receive a property label and security tag, and then shelved with their bound counterparts in the journal stacks (we organize our journals alphabetically). For titles outside the core list, where online access is considered adequate, the print is discarded on receipt. We continue to evaluate our collection and move to e-only subscriptions when they become available, to minimize the number of issues discarded.

A usage study of our journal collection provided the data to justify check-in reduction by showing that just over half the current print collection received no use; results of the study were published in *Library Collections: Acquisitions and Technical Services* (29:2, June 2005, pp.169-179). In addition, the library brought in consultants last year to create a roadmap for the reorganization of technical services (now re-named Collection Development and Management). They recommended that we focus on the resource formats our patrons are using, and shed print-related functions, such as journal check-in, so staff can devote more time to electronic resource issues, such as electronic shelf-reading, troubleshooting, and maintaining our SFX Knowledgebase (OpenURL Revolver).

**RESPONSE:** Submitted by Pamela Bluh (Associate Director for Technical Services & Administration) and Jerri Shahverdi, (Library Technician II, Serials Team), Thurgood Marshall Law Library, University of Maryland School of Law

Streamlining workflows to create a more efficient environment is always desirable, but giving up serials check-in — until recently that would have been considered a cardinal sin. However, in 2003, major staffing changes in technical services, coinciding with the migration to a third generation integrated library system, provided the impetus to recommend that we discontinue check-in of all daily and weekly periodicals, cease check-in of titles designated “current year only retained,” stop checking in advance sheets for law reporters and stop claiming issues that were not going to become a permanent part of the collection. While while we were at it, we suggested that we stop labeling bound volumes of continuations in the federal and state collections and that we arrange to have basic call numbers printed on the spines of commercially bound materials.

It wasn’t difficult to convince the staff of technical services that these changes would save us time and improve our work lives — they were on board with the plan immediately. We were able to persuade the staff in other library units that the changes would not have a negative impact on service but would finally allow us to attend to a number of tasks that had been neglected, overlooked or completely abandoned.

The impact of the changes was immediate. We were finally able to concentrate on time-sensitive tasks such as filing looseleaf services, investigating and resolving problems, database management and binding (yes we still bind our periodicals!) For the first time in several years we felt confident about taking on new assignments such as radio frequency tagging parts of the collection without worrying whether we could do the tasks justice. Morale improved and we were inspired and encouraged to review other procedures and consider additional modifications. We “retired” the ubiquitous property stamp — the one with the date that had to be changed daily — in favor of a self-adhesive label which serves as a surrogate “property label.” We bought the 3M™ Tattle-Tape™ application system which greatly improved the efficiency with which we sensitized materials and, as an added bonus, the processing area is much tidier because we don’t have all those little green plastic strips sticking to everything!

In addition to the immediate benefits of freeing staff to handle essential tasks and reducing backlogs, there were other, unanticipated positive consequences as well. A team approach to processing evolved, which empowered the staff to become actively involved in decision-making. The “serials team” consists of three staff members. Rather than each member of the group constantly handling one or a few specific tasks, as had been the norm, the three began to share responsibility for a wide variety of tasks on a rotating basis. Over the past 18 months, working harmoniously together, they have continually adjusted the schedule so that responsibilities are equitably distributed.

The rotation has proved to be a great way to evaluate the effectiveness of each task and al-
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allows each team member to self-monitor his/her work flow. Some tasks rotate on a weekly ba-
sis, others rotate bi-weekly and still others ro-
tate less often. As each staff member moves to
ew assignments, he/she is motivated not to pass
on a backlog to a colleague. The tedium of the
more boring tasks such as opening and sorting
mail or labeling is eased because responsibility
for these tasks changes more frequently.

In any organization, change is difficult. The
decision to discontinue serials check-in for cer-
tain categories of material served as the cata-
lyst for a vigorous, ongoing process of review
and evaluation. The staff embraced the need
for change and viewed the changes as an op-
portunity to hone existing skills and acquire new
skills, while simultaneously creating a flexible
organization that adjusts more readily to con-
stantly shifting requirements.

RESPONSE: Submitted by Andrea
Christman (Catalog Librarian, Day-
ton Metro Library, Dayton, OH)

Dayton Metro Library recently decided to
eliminate serial check-in for periodicals received
by our 21 branches, although subscriptions for
the Main Library will continue to be checked
in. In considering this change, Technical Ser-
vices asked for input from public service staff,
including the branch staff. After examining
staffing and reference needs, as well as patron
utilization of the collection, it was decided that
the library community and staff would be bet-
ter served by eliminating magazine check-in for
the branches.

Before January of 2006, all periodicals were
checked in at the Main Library (except for news-
papers). Issues were mailed directly to the Main
Library, where a serials clerk checked them in,
and then they were sent to the branches. Con-
sequently, there was often a delay in receiving
these publications at the branches; this was
particularly noticeable for periodicals with
timely information, such as U.S. News & World
Report. Branch staff indicated that they would rather have the
magazines faster than have them sent to the Main Library
for check-in.

Having the magazines drop shipped to the branches
meant that the branch staff would have to check the
magazines in themselves, or not check them in at all. If they
continued to check-in, they would also have to maintain the summary of holdings
statements by editing them as old issues are discarded.
Branch staff felt that patrons did not rely on the
summary of holdings to tell them what was on
the shelf; the magazines are primarily a brows-
ing collection. Additionally, the summary of holdings did not always accurately reflect
what was physically in the library because circulating
copies are checked out by putting item records
on “dummy” bibliographic records.

Creating item records on the magazine’s true bibliographic record was considered, but most
branches did not want the magazines to be
reservable or to be subject to the wear and tear
of increased delivery. Given the additional staff
and the fact that patrons did not truly use
the summary of holdings, it was decided that
checking in periodicals at the branches could
be eliminated. We know that there are advan-
tages and disadvantages either way and the de-
cision was not unanimous; some branches
wanted to keep periodical check-in.

Several things, however, have not changed.
Most importantly, our catalog will still display
which branches have subscriptions to a
given title; there will also be a general hold-
ings statement, such as “Library keeps current
three years.” We re-
cently migrated to a
new ILS and have not
yet begun automatic
claiming; branches are
to notify our Acquisi-
tions Department if an issue needs to be
claimed. Additionally, issues for the Main Li-
brary will continue to be checked in. The Main
Library staff felt that it was important to have
a listing of what they own since they are
charged with storing and binding the back is-
ues of selected titles for the entire library
system. Although it will take several years
for this plan to be fully implemented (the ad-
dresses on some subscriptions can only be
changed when they are renewed), Technical
Services hopes that both the patrons and the
staff will be better served with this new pro-
cedure.

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International Dateline — Scholarly
Publishing: A European Perspective

by Dr. Peter T. Shepherd (Project Director, COUNTER) <pt_shepherd@hotmail.com>

Two information industry gatherings, both
held in Europe in April, addressed some of
the most pressing challenges facing our industry at this time. At the University
of Warwick, England, a capacity audience of over
600 delegates attended the 29th Annual Confer-
ce of the United Kingdom Serials Group
(UKSG) from 3-5 April. While the leafy
Warwickshire countryside looked its best in
the bright spring sunshine, delegates were not
tempted to linger out of doors for too long, as
winter reminded us that she had not quite lost
her grip, with bracing northerly winds and oc-
casional snow flurries. Inside, we were treated
to a programme of plenary sessions and work-
shops/briefing sessions addressing topics such
as the economic evaluation of the scientific pub-
lishing market, innovations in scholarly com-
munication, the transition to e-only format, digi-
tal archiving, setting up an institutional re-
spository, non-standard licensing models and
journal article versions. A full programme of
this conference is available on the UKSG
Website (http://www.uksg.org/events/annual
conf06/asp), while a new blog, “LiveSerials,”
provides further information on presentations
and discussions at the conference (http://live
serials.blogspot.com/).

Meanwhile, in a two day conference on 4-5
April, another group of industry leaders gath-
ered in Berlin for APE 2006: Academic Pub-
lishing in Europe, the Role of Information in
Science and Society. Jointly initiated by AKEP
(Electronic Publishing Working Group) and
ALPSP (Association of Learned and Profes-
sional Society Publishers), and organised un-
der the auspices of the European Commission
(EC), APE 2006 brought together 160 partici-
pants from 15 countries, and included publish-
ers, scientists, research funding organizations
and librarians. The goal of the conference was
to seek a common language on structural
changes taking place in publishing, and science
communication in the context of society at large.

In her opening remarks to APE 2006, Sally
Morris, Chief Executive of ALPSP, struck an
historic note, by pointing out that the heart of
academic publishing is in Europe and that the
advances in information technology and commu-
nication (ITC), to which European scientists
have greatly contributed, are now of fundament-
ally importance to the publishing industry. This
theme was picked up by Dr. Nicole Dewandre
of the EC Research Directorate General, who
placed academic publishing at the heart of the
European research effort and stressed the high
priority given to research by the European
Union (EU). She stated that, in her view, STM
journals are an essential channel for the diffu-
sion of scientific knowledge. She also drew at-
tention to a study commissioned by the EC that
investigates the perceived market imperfections
of the current publishing system and evaluates
alternatives made possible by the electronic
revolution. This “Study on the economic and
technical evolution of the scientific publication
continued on page 69

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