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

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

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

Since we eliminated routine periodical 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 renamed 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. And 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 sensitize 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

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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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lows each team member to self-monitor his/her work flow. Some tasks rotate on a weekly basis, others rotate bi-weekly and still others rotate less often. As each staff member moves to new 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 those tasks changes more frequently.

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

RESPONSE: Submitted by **Andrea Christman** (Catalog Librarian, Dayton 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 Services 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 newspapers). Issues were mailed directly to the Main Library, where a serials clerk checked them in, and then they were sent to the branches. Consequently, 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 browsing 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 time 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 advantages and disadvantages either way and the decision 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 holdings statement, such as "Library keeps current three years." We recently migrated to a new ILS and have not yet begun automatic claiming; branches are to notify our Acquisitions Department if an issue needs to be claimed. Additionally, issues for the Main Library 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 issues of selected titles for the entire library system. Although it will take several years for this plan to be fully implemented (the addresses 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 procedure. 🐾



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 Conference 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 occasional snow flurries. Inside, we were treated to a programme of plenary sessions and workshops/briefing sessions addressing topics such as the economic evolution of the scientific publishing market, innovations in scholarly communication, the transition to e-only format, digital archiving, setting up an institutional repository, 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](http://www.uksg.org/events/annual)), 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 gathered in Berlin for **APE 2006: Academic Publishing in Europe, the Role of Information in Science and Society**. Jointly initiated by **AKEP (Electronic Publishing Working Group)** and **ALPSP (Association of Learned and Professional Society Publishers)**, and organised under the auspices of the **European Commission (EC)**, **APE 2006** brought together 160 participants from 15 countries, and included publishers, 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 communication (ITC), to which European scientists have greatly contributed, are now of fundamental 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 diffusion of scientific knowledge. She also drew attention 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

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