Panel Discussion – Shelf Ready experiences

Moderator: Mary Konkel – College of DuPage

Panelists: Deborah Morris – Roosevelt University
Kavita Mundle – University of Illinois at Chicago
Connie Mead & David Malone – Wheaton College,

1. Why did your library implement shelf-ready services?

RU: lack of staff, cost efficiency
UIC: save time & money; improve workflows and help speed up distribution of materials to branch libraries; improve user experiences
WC: reallocate resources – put staff to better use; reduce exceptions (piece by piece processing); streamline workflow; simplify & standardize practices; embrace ‘good enough’ as a quality standard

2. What aspects were most important?

RU: accuracy & professional appearance of materials
UIC: quality control, timely access
WC: streamline workflow; simplify & standardize practices; accelerate entire “selection to shelf” process

3. What vendors did you consider, and why?

RU: vendors that CARLI recommended
UIC: YBP already in use; not many vendors out there
WC: YBP already in use

4. Did you do a trial first and if so, what kind?

RU: no trial
UIC: no trial; 2 phases in the early 90s; 2010 added an expanded plan
WC: no trial, but instead we underwent a “slow immersion” into shelf-ready

5. Have you managed shelf-ready materials differently than non-shelf-ready materials?

RU: Yes, shelf-ready materials are handled differently. And nothing is ever completely shelf-ready. For example: music scores are not profiled so should not technically be handled by shelf-ready vendor; everything has to be re-done or corrected

UIC: Definitely managed differently than non-shelf-ready; everything has to be checked; not always done adequately, things missing, e.g. name authority and series headings
inadequately controlled or lacking; quality of records varies; great deal of work with reports to check record load; can be time-consuming to check; use the Strawn toolkit to make certain adjustments. Health sciences books do not come shelf-ready. Selectors place orders through YBP's GOBI ordering site. Brief order records are first added to the catalog and then replaced by OCLC's PromptCat/WorldCat Cataloging Partners Records. YBP gets the shipment ready and then ships books directly to all of our health sciences libraries. The WCP full records need editing, as these records do not have complete call numbers. They come with class number, but without the Cutter and the date added (NLM stopped assigning the Cutter and date to the call number since 2010). The people at the health sciences sites add the Cutter and date, check the shelflist, create holdings, and finish shelf-prep.

WC: Found almost every part of the process required adjusting. Opted to have YBP do every step of the physical processing, except for property stamps and date due slips; we are doing these two steps internally for cost reasons and to leverage already available students worker hours.

7. What is the quality of bibliographic records for shelf-ready materials?

RU: depends on quality of each record; if there is no OCLC record, then YBP makes a minimal-level record, which has to be upgraded.

UIC: quality varies depending on level of record available; UIC adds RDA elements that are missing in the record; sometimes receives brief records which have to be upgraded

WC: (most positive answer of the three) – purchased 'best OCLC records available' (from a three tier selection); David Malone strongly recommends that CARLI leverage its strength as a consortium to get YBP to consistently do full level cataloging

8. Do shelf-ready materials affect local procedures and cataloging practices?

WC: local impact has been 100%; still cataloging some non-shelf-ready, but now have time to do in-depth cataloging when warranted, plus time to do special projects; they have been able to move what have been staff-level tasks down to student-worker levels; also went to DePaul to see how they were implementing shelf-ready procedures; Connie explained that WC has 6 different profiles for the different services they want YBP to do on various types of books; Cataloging is a fixed cost; processing is a variable cost (depending on which processing services the client wants)

9. What is the level of satisfaction with shelf-ready services?

RU: rather low – processing has improved greatly; materials look great; cataloging is less than stellar
UIC: no major complaints; nothing has been a big problem they couldn’t resolve. They tweaked their profiles a couple of times, changed what goes in a certain MARC field, etc.

WC: cataloging more streamlined; acquisitions more complex

10. If shelf-ready has been a success in your library, do you see its role expanding to include other vendors, other formats, etc.?

RU: if the success rate were higher, would more than welcome role expanding, especially with processing;

UIC: We would not do SR with special collections; in a sense have been doing outsourcing, but calling it something else – with Serials Solutions

WC: not so much expanding per se, but more projects as a result of more ‘free time’; David Malone recommends finding ways to expand bulk cataloging via MarcEdit, etc. Connie Mead explained that WC has one sub-account for special collections – items are cataloged up to a point, then WC does the rest; Connie also argued against expanding: it took two years from when they started doing their tech specs to when they got their first SR books.

Additional questions, comments from the Roundtable sessions:

Question about costs:

WC: Dewey classification costs more than LC

Question about quality control:

RU & WC: some overlay & discard issues

RU: some labeling problems

WC: Please check Wheaton’s url that they included in their handout for more information on workflow: librarylink.wheaton.edu/shelfready (https://library.wheaton.edu/shelfready)

What tools do you use at Wheaton for batch processing of bibliographic records?

Macro Express to automate repetitive data entry tasks; MarcEdit to make batch changes to bibliographic records and MFHDS; Strawn Utilities to make batch changes to headings; Voyager pick and scan (soon to be significantly enhanced!) to make batch changes to bibliographic records and MFHDS.
Some general discussion on the issue of ‘taking jobs away’ either from students or paraprofessionals

Question about cost analysis:

WC: 80% of records received are at an acceptable level; table of contents is usually what needs to be added locally

Question about ‘change in culture’, attitudes to change in workflow from staff

WC: has varied depending on individual (i.e. some people do not like change in general); getting ‘buy-in’ from staff and stakeholders has initially been slow until the advantages are evident (e.g. time for special projects and work on legacy records)