

R2 Implementation Team Recommendations – Part 1 – Approval and Next Actions, 2/22/07

For full descriptions of each category and the text of all recommendations, please see the original document: *Report on Streamlining the Management of Physical Materials – Part 1*, December 18, 2006. The numbering below corresponds to the numbering used in the *Report*.

2. Reducing the Volume of Incoming Print Journals and Serials

2A. Inform the MIT Community via an email from a member of Steering Committee about our plans to move to e-only subscriptions when titles reside in a TDR.

Action → Recommendation to create communication plan accepted. Marilyn is currently working with Anna and Heather on this. Additional details will be forthcoming.

2B. Review about 500 print subscriptions from Wiley, Taylor & Francis, Sage and Oxford. Consult with faculty during the spring semester. Complete the cancellation decisions by summer 2007 for implementation in fall 2007.

Action → Recommendation accepted and CMG has already begun working with Kim to coordinate this effort.

2C. Adopt the Guidelines for Maintaining Electronic and Print Subscriptions and use them to make dual format cancellation and subscription decisions.

Action → Guidelines have been accepted.

2D. When a cancellation project with a particular publisher yields savings of \$10,000 or more, the savings should be moved to M-TEC-BKFL for back file purchases. Savings below \$10,000 should be recovered in the ZNEW funds of the appropriate libraries.

Action → Recommendation accepted.

3. Handling of New Print Receipts

3A. Adopt changes as suggested in the Short Guide for Processing New Materials including:

- Eliminate date due stamps and replace with email notification.
- Eliminate use of round property stamp.

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Action → Implement changes in Short Guide for Processing New Materials – winter /spring 2007.

Action → BAG asked to investigate the use of date due receipt printers at service desks with the goal of deploying printers and eliminating the use of date due stamps no later than August 1st. Findings will be communicated to PSLG.

Action → Use of round property stamp will be eliminated effective March 1st.

3B. Follow-up on other high impact items needing further review.

- Possible elimination of the “new book” flag.
- Possible elimination of the penciled in call numbers.

Action → Complete all recommended follow-up on high impact items – winter/spring 2007:

- Attempt to eliminate “new book” slip (Charlene and Processing Supervisors)
- Attempt to eliminate penciled-in call #'s (Preservation Services)
- Attempt to eliminate printout of bib. slips for SERMS (Kim and Rebecca)

Action → Revise all outdated forms by appropriate staff in SerAcq, CAMS, GovDocs and LSA, as noted on the master inventory – winter/spring 2007.

Action → Preservation Services should complete an investigation and make recommendations for types of labels, tape, dots, reserve flags to be used system-wide and provide documentation and training to staff – spring 2007.

3C. Charge a group with reviewing the Inventory of Stamps Used by Divisional Libraries and Branches for the purpose of streamlining and standardizing processes in all Public Service departments.

Action → ASG will begin a review the “Inventory of Stamps Used by Divisional Libraries and Branches” and develop a strategy for streamlining and standardizing their use in local units – spring/summer 2007.

3D. As changes are implemented, staff, patrons, and/or donors need to be notified, as appropriate, about the replacement of the date due slip with email notification and the cessation of the use of generic “Gift to the MIT Libraries” bookplates

Action → Recommendation accepted with modifications – further investigation underway regarding what might replace date due slips.

4. Barcode Placement

4A. All units should begin using the proposed Barcoding Guidelines for Book Formats including:

- Placing barcodes on the front cover, upper left corner.
- Placing call number labels (that had previously been affixed to the upper left corner, front cover) on the front cover, lower left corner.
- Piggyback barcodes for paperbacks will be moved to the recommended standard location once the book reached the local unit.

Action → Recommendation accepted and to be implemented as of March 1st.

4B. Investigate costs and feasibility of barcode duplicators.

Action → Preservation Services should investigate costs and feasibility of barcode duplicators and report findings to DLG/TSAC, spring 2007.

4C. Review different types and styles of barcodes and uses.

Action → ASG should discuss the variety of barcodes and their uses to determine if we can eliminate any categories. They should also create a document inventorying the types of barcodes, when to use them, and where to order them – spring 2007.

Action → ASG should review the implementation of the guidelines and recommend changes if needed – fall 2008

5. Check-in of Monographs

5A. Continue monographic check-in in local units.

Action → Recommendation accepted.

5B. If we do decide to receive shelf-ready books from YBP, we will need to look again at our monograph workflow.

Action → Recommendation accepted.

6. Check-in and Claiming of Print Journals and Serials

6A. Streamline check-in as detailed in Process for Streamlining Journal and Serial Check-in.

6B. Reduce and streamline claiming as detailed in Process for Reducing and Streamlining Journal and Serial Claiming, including:

- Do not claim individual issues of titles that are not bound.
- Do not claim a title once the decision to cancel is made.

Action → Recommendations 5A and 5B accepted.

Action → Implement the new procedures and update existing documentation for check-in and claiming – winter/spring 2007.

Action → Kim Maxwell and Lisa Harrington will meet with all staff who perform check-in and/or claiming to discuss the changes to our procedures and implement them – spring/summer 2007.

7. Binding Standard Print Formats

7A. Adopt the Guidelines for Binding Standard Print Formats which apply to all titles regardless of their electronic availability. Reasons for titles not to be bound include:

- Limited print retention.
- Also received in microform.
- Received in more than one library – only library of record should bind.

Action → Recommendation accepted.

Action → ASG should determine where to store binding decision at the title level (database and field) – spring 2007.

Action → Using the lists of duplicate print journal and serial subscriptions from Kim Maxwell, CMG should determine the library of record for binding responsibility and determine limited retention policy for others – winter/spring 2007.

Action → Local processing should record binding decisions for all titles (using CMG decisions as well as a list of print journal and print serial subscriptions that are also received in microform from Kim Maxwell) in the appropriate database – spring 2007.

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Action → Ann Marie will work with ASG to investigate alternatives to commercial binding and to create guidelines for when to use various types of preservation techniques – FY2008.

7B. Reinvest binding savings from print cancellations to bind more new print monographs and repair older items in active use.

Action → Recommendation accepted.

8. Missing Issue Backordering and Binding

8A. Adopt the Procedures for Backordering and Binding Incomplete, including:

- Do not backorder issues of journal titles that are available electronically to MIT (excluding aggregators); bind them incomplete instead.
- Do not backorder issues of journal titles that are not bound.

Action → Recommendation accepted.

8B. Monograph Acquisitions and the local units should discuss the status of long outstanding backorders.

Action → Monograph Acquisitions will continue its review of the backorder process and meet with the local units to see if the process can be further improved. These groups should also meet to discuss communication methods, specifically in relation to older pending backorders – spring 2007.

Action → All local processing, Monog Acq, and Ser Acq staff should be in communication about the plan so that every individual who does backordering or binding is aware of and understands the new procedure and the new limits – spring 2007.

Action → These new procedures will be incorporated into existing documentation.

8C. In most cases, bind incomplete volumes three months after backorder has been placed. Rebind volume if backorder is eventually successful.

Action → Recommendation accepted.

9. Record Maintenance Authority of Local Processing

9A. Adopt Expanded Local Records Maintenance Authority Guidelines

Action → Recommendation accepted.

Action → Consult with Rebecca and Beth to determine earliest possible date for implementation – winter/spring 2007.

Action → Communicate with all local processing staff and all central technical staff who will be affected by them – winter/spring 2007.

Action → Update current procedures to reflect this new policy.

Action → Serials Cataloging will set up a training plan for updating local processing skills in creating NISO compliant holding statements – spring 2007.

Action → Rebecca and Beth will evaluate the revised responsibilities to determine if additional changes are needed. If so, Rebecca and Beth will communicate with staff and determine if a longer review period is needed – spring 2007.