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Managing In-Kind Gifts with GIST's Gifts and Deselection Manager

Abstract

Unsolicited gifts exacerbate existing space issues and backlogs, staff workflows, and collection policies. As the scope and needs of libraries continually change, the positions that might have typically managed these donations, such as gift librarians or paraprofessional staff, are no longer automatically replaced as they become vacant. In the University of Mississippi Libraries, recent technological developments such as the Getting It Started Toolkit (GIST) Gift Deselection Manager (GDM) have helped to streamline workflow by generating data that can be shared with subject librarians as well as administration.

1. Introduction

Both welcomed and dreaded, in-kind gifts can be a boon to a library's collection as well as a drain to its resources. Donors who offer their treasured books to their favorite libraries sincerely believe that they are doing a good deed, while serving their own need to clear a personal space such as an office, home, or even a single shelf. Their gift, they reason, saves a book from destruction. As librarians, we should be grateful to receive these free books, only they are never really free. Unsolicited gifts exacerbate existing space issues and backlogs, staff workflows, and collection policies. And as the scope and needs of libraries continually change, the positions that might have typically managed these donations in the past, such as gift librarians or paraprofessional staff, are often seen now as redundant and are often eliminated as they become vacant. Bishop, Smith and Sugnet (2010) discuss a project at Colorado State University that limited future gifts-in-kind to materials for Archives/Special Collections, that is to say, only unique and valuable items (115), after a consultant's study revealed that they were adding fewer than 20% of the gifts accepted for review (117). "Libraries," they write, "are questioning

the value of general gifts-in-kind acquisitions” (116). As Canevari de Paredes points out, while academic libraries are “always looking for potential collection enhancing treasures, and gifts-in-kind can be the source for those unique items which distinguish collections, [the reality] is that the average gift-in-kind is often just average and, more often, not required” (55-56). Recent technological developments such as the open source Getting It Started Toolkit (GIST) Gift Deselection Manager (GDM) can help to streamline workflow, thereby avoiding some of the space issues that managing gifts can cause, with a minimum of our most precious resource: time.

2. Background

At the University of Mississippi Libraries (UM), gift books had become a bit problematic. While the process of gift evaluation had always been time consuming and, in the absence of a Gifts Librarian, Gift Room, or even Head of Collection Development, the preferred disposal method of unaccepted gifts was a sizeable donation to a local group’s annual on-campus charity book sale. However, this solution had also proved problematic, and had to be discontinued: there was a continual fear of unwanted gift items comingling with accepted or archival items, some donors did not appreciate seeing their prior gifts in the charity sale and, finally, it raised questions about state property that were difficult to answer – including unselected gift books as well as the disposal of items deselected from the collection – resulting in a backlog of books cluttering up already limited space in Technical Services. Furthermore, the paraprofessional assigned, among her other duties, to triage gift books – comparing a gift copy with the existing shelf copy (if a duplicate), searching the catalog for duplicates and/or alternate editions, distributing the gifts to the appropriate subject librarians, where they would linger in cubicles for weeks, months, and sometimes years – was not replaced when she left the institution. Meanwhile, the gifts kept coming, and a solution was desperately needed. Through our relationship with the RAPID-ILL program, we discovered the GIST Gift Deselection Manager which, along with a discussion of and

changes to collection policies, inspired a conversation about how to tackle an increasingly untenable situation. The first decision: books without an ISBN, unless very unusual or collection specific, would no longer be accepted, as they likely contained older content and/or were in deteriorating condition which we no longer wished to add. The next decision, related to duplicates, was that duplicates would not be added unless the total circulation count was higher than 5 checkouts or renewals since 1994, when our library first adopted an ILS. Duplicate gifts would not be physically compared to items already in the stacks, but could be used to replace lost or missing items as identified by Access Services/Circulation. The final decision was an affirmation of previous policies: that neither textbooks nor items in poor condition (including excessive underlining or highlighting) would be added, and past issues of print journals could only be used to fill in existing print subscriptions.

3. Literature review

Literature varies on the best way to accommodate in-kind gifts, with Carrico offering an annotated bibliography of 48 publications from the 1970s through the late 1990s. Some articles, such as Allen (2012), focus on archival collections and deeds of gift, tax issues, and other procedures that often must be endured to add unique items to a collection. Cooper (2010) offers practical advice for public libraries faced with unwanted gifts, including using a library's Friends group to process gifts instead of valuable staff time, and considers the myriad reasons that donors give us their books: some "can't find any place else to discard their old books or they only want a tax deduction," while others are good-hearted but misguided (31). The majority of articles about gifts-in-kind, including Massey (2005), stress the importance of a written gift policy, with little discussion of processing or workflows beyond the addition of a 5XX note in the bibliographic record. Fischer's "Group Therapy" column addressed the question of preliminary screening or filtering (79) of gifts-in-kind. While three of the four respondents stressed the importance of a strongly worded gift policy, including a list of generally undesirable items,

such as book club editions, brittle volumes, etc. in order to keep certain types of items from entering one's building, the fourth respondent revealed that at her library, there is a long-time colleague who does a preliminary screen with a support staff member searching the catalog and WorldCat before sending to the subject librarians for review (79). But what if your library does not have one of those colleagues? Or what to do after that colleague retires?

Some articles do specifically address workflow: Bindle and Boden (2011) write of using digital photographs in the initial assessment of a collection's "suitability for assessment, documentation and the creation of a gift list" (94) when the collection is at an offsite location. Arch (2011) uses a FileMaker database to manage the data entry for gift letters, and culls out both duplicates and items in poor condition before sending to subject librarians for evaluation. Her institution was also flirting with a "consortial threshold" (71), where a gift would not be added if three copies already existed in the consortium, as well as a timeframe for the evaluation process. "Free can be a very good price," she writes, "if managed efficiently" (72). Other articles discuss recent projects and changes at their respective institutions. Wachel (2002) describes a method used at the University of Iowa: unwanted gift books are given to a local book dealer specializing in out-of-print items. The items are placed on consignment for a certain period of time – if they sell, the library receives 40% of the sale price, which can be used to purchase new materials – and if they don't sell, they are returned to the library for its book sales. They are fortunate, however, that this book dealer is local, and there are no shipping costs to consider. Even before our state property questions became too thorny, the book sales in our library presented accounting issues that were not necessarily worth the effort and, invariably, at least one professor, clutching a particular volume, would approach a staff member and ask, "Why aren't you adding this title?," second-guessing the prior decisions of the subject selector.

The arrival of Better World Books (BWB), and in particular, its Library Discards and Donations program, has made the task of getting rid of unwanted gifts much more streamlined. At the time of the 2005 Charleston Conference, BWB directors Holland and Kindregan (2007) reported that “over 325 libraries across the United States” were participating in the program. In 2014, over 3,000 libraries across the United States, Canada, and the United Kingdom have partnered with BWB, including academic, public, and special libraries. They process the books in their warehouse, and list them for sale online. Those that do not sell are recycled. As noted by Tang (2012), “BWB pays for the shipping costs; it is most cost-effective for them if we send a minimum of six boxes in each shipment. The library receives a check quarterly that we use to supplement our book budget.” Between six and twenty boxes can be shipped via UPS, or a private shipping service can be hired to send boxes on pallets. While we enjoy the alternate revenue stream, which conveniently can be spent either with BWB or with their partner Ingram Library Services, we do not depend on it, preferring to look at BWB as a recycling service, which keeps our unwanted gifts out of our own recycling bins and out of the patrons’ field of vision. BWB’s growing “donation box” program in over 25 states, of locally placed steel boxes accommodating up to 800 books at a time, might eventually reduce the number of gift books coming through library doors, but until then, we have to find ways to cope with the influx. Anything we earn with BWB is *lagniappe*: an extra or unexpected gift or benefit, like a 13th donut. But how to decide which items go to BWB? Enter the GDM.

As recounted by Pitcher et al (2010) and Pitcher (2011), the open source Getting It System Toolkit was developed and implemented at SUNY Geneseo as a way to integrate workflow in interlibrary loan, acquisitions, and collection development. Using ILLiad with “data from various Web application programming interface (API) services with user request parameters,” (224), they developed a request interface that would help the librarians decide if it is easier to purchase a requested item or more cost effective to go ahead and purchase it. Because UM started using GIST in our patron driven acquisitions program (PDA), we soon learned about the GDM, a tool “developed to help library staff save time

through a thoughtful workflow based on criteria that would otherwise take them a great deal of time to compile” (Riley, 2012). The tool combines batch analysis, APIs, and a “weighted and fully-customizable collection-building profile (based upon the OCLC Conspectus) that provides a recommendation for each and every item,” and can also be used to generate donor letters.

4. Workflow using Gift Deselection Manager to process in-kind gifts

GIST’s GDM is a free, open source download from their website (gistlibrary.org). Setting up a profile includes an institution’s OCLC code and cataloging authorization, as well as API keys for Google Books, Amazon and WorldCat. With an ILS-generated list, it can be used for any number of projects from weeding in specific call number ranges to checking for overlap within a consortium or in Hathi Trust. After a bit of trial and error, this is the workflow that has worked best for us: working in batches that can fit on one book truck, make a list of ISBNs. This can be tasked to a student worker using a barcode scanner or a standard keyboard’s number pad. Save the list as a text file, with a date specific file name (Gifts-mm-dd), and upload as a batch to GDM. This action will then generate a spreadsheet that includes: author, title, ISBN, OCLC number, its price on Amazon, and its availability on Google Books or in Hathi Trust. Within an institution’s profile, if consortia are entered using OCLC institution codes, the spreadsheet will also indicate if the book is held by partner libraries. After saving the spreadsheet as an Excel file, take the column of OCLC numbers and save as the same text file as previously created, overwriting the ISBN file. Process as a batch file in OCLC to see what is held at your institution, as the spreadsheet results can sometimes be inconsistent. When duplicates are found, we do not add the item unless those “held” are actually on search or missing, or if circulation statistics indicate that a second copy would be likely to be needed. The decision of whether or not to add a duplicate is made without the involvement of the subject librarian. If not a duplicate, therefore not in the catalog, we notify the appropriate subject selectors, based on the item’s call number, as indicated by the GDM, by sending a

modified version of the spreadsheet to interested parties while keeping the items themselves on a designated shelf in Technical Services. Selectors are asked to evaluate the items, and make a decision by a 5-week deadline to either add or discard. A friendly reminder is sent via email one week before the deadline. If they do not make a decision by the given date, even after the reminder notice, the items are not added to the collection, and are routed for disposal with our current disposal service, Better World Books (BWB). Like all of our vendors and services, BWB submitted a bid through our Procurement Office in compliance with laws of the State of Mississippi and University policies.

5. Results

The adoption of the GDM at UM has been nothing short of successful. Our processing shelves are no longer cluttered with unsolicited materials, leaving space for larger projects as well as a designated area for gift evaluation. Subject librarians are pleased that these materials are no longer cluttering their personal workspaces, and many appreciate being able to work from a portable spreadsheet that they can work with at their own desk, a service desk, or on a mobile device. Materials are evaluated faster, and therefore processed faster, and donors are pleased to find their gifts listed in the online catalog. Because we can send shipments to BWB as soon as we fill up a minimum of six boxes, we no longer have to wait for that annual book sale, by which time we were drowning in heavy boxes which would have to be moved by student workers or staff. Patrons do not see us throwing books away in recycling bins or, worse, dumpsters, and they no longer go behind us at the book sale to question our evaluation decisions. Funds generated by the sale of our discards can be used to purchase replacement items, whether out of print books available from BWB or new titles available through Ingram. And the reports generated by GDM help us keep track of what was donated, when it was processed, and how often it circulates.

6. Conclusion

There's no such thing as a free lunch, nor a free book. Despite their best intentions, the unsolicited gifts-in-kind we receive from patrons can create a logjam in processing. In an era when libraries are looking closely at the percentage of their space devoted to shelving, and the allocation of resources to support existing collections, each book added to a collection – whether a gift or a title purchased with firm order funds – needs to have been added thoughtfully, with both current and future patrons in mind. Many librarians are reluctant to make the difficult decisions of which books can come in and which ones cannot, but open source tools such as GIST and GDM can make those decisions, and the discussions that go with them, a little bit easier.

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