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UST Libraries Collection Management and Services Annual Report 2008-2009

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**Annual Report
Collection Management and Services – CMS
2008-2009**

Human Resources

Personnel:

Linda was out for an extended period. Everyone continued to make a contribution to the department and library. My special thanks goes to Dani who served as Acting AD while I was out.

While Dan and Deb arrived near the end of the last fiscal year, it was during this fiscal year that they started to fly! They have become full members of the staff and have taken on responsibilities and learned Millennium, OCLC, EXCEL, Blackwell's Collection Manager and have made themselves valuable colleagues.

Special personnel kudos:

Cindy Badilla-Melendez has been working at the Main Reference desk and has been participating in the work of R&I.

Dani Roach, was named to the National Information Standards Organization's Cost of Resource Exchange Working Group [CORE]. This group of nationally recognized experts from libraries and vendors was charged with developing standards that will facilitate the exchange of cost, fund, vendor and invoice information among integrated library systems, business systems, electronic resource management systems and other interested parties, such as subscription agents. The standards are intended to promote seamless linking among these systems to minimize duplication of data entry. The committee had three goals: define and develop a list of data elements exchanged among these systems; create transport protocol useful for moving the data elements among these systems; and develop "use cases," which will aid users in understanding the capabilities of the protocols. The selection process for membership in NISO committees is competitive. This committee completed its work, the standard is in draft review and Dani presented on that work at NASIG.

Projects and Activities:

The following will be grouped in either the whole of Collection Management and Services, when the work involved members of CMS and others, and then by the units which together make up CMS. For emphasis, it should be remembered that these are projects in addition to all of the day to day work of getting resources into the library and then in the hands of our users as quickly and accurately as possible.

ACROSS Collection Management and Services (& with others)

Created a display at OSF for **Banned Book Week**

During the fiscal year members of the UST library community gave countless hours to **CLIC** with energy and intelligence. If UST's financial contribution were decreased by the number of hours put into CLIC, CLIC would owe UST money. Including but not limited to providing leadership to improve catalog efficiency and enhance catalog access to library materials.

- Led **CLIC catalogers Task force** examining new record browse display
- CMS staff were full participants in the evaluation of Encore **Discovery** layers and then active in the testing after implementation.
- Celebrated implementation
- Participated in the evaluation of the III **enhancements** list, and sent one in.

- Participated in CLIC **Executive Director** interviews

Databases maintenance requires intense work to insure better access for our users.

Everyone participates in database clean up. Some systematic work was completed by identifying generalized problems, creating queries and lists and then revising the database as necessary (e.g.): identifying order records without cat dates (note that UST staff did over 53,000 database fixes

Began the implementation of **Kindle** into library purchasing.

Participated in the **Library Open House**

Attended **Library Retreat**

Participated in **Library Week** activities including setting up for and selling at the Book sale

Created a new method for managing **new book lists** and items on the shelf.

Space issues

- Participated in the reference room move – 3 days, 4 meetings.
- Making room for the elephant statue

Continued to select books in honor of graduating **senior student staff** including sending parents letters of congratulations

Administrative

Many activities support the administrative work of the department and libraries.

Instituted book selling through **Alibris**. (\$1,035.00)

Hired **Chad** to come in and reconfigure MACROExpress and worked with Lizabeth. Others in the department have also implemented the product for use for their work. Not quite where we'd like to be, but it's improving.

New **computers** were installed and Ill was upgraded. Had to reinstall and reconfigure ConneXion and other programs and settings.

Collaborate with **DI** as they develop priorities and procedures with new staff and evaluate roles and responsibilities related to e-resource management.

Developed and updated an **e-resources** procedure and attending documentation.

Participated in the **interviews** for the new business librarian and for the new webmaster.

Letters of reference for current and past employees

Participated in **Library Cleaning day**.

Supporting **OCBs** purchase of several business datasets.

Implemented **Office 2007**

Developed draft **theses** and dissertations guidelines for the University Libraries as regards library handling and removal from the collection requests.

Year end spending and budgeting for 09 fiscal year

Collection Management

Collection Management is not necessarily a CMS operation. The work of assuring that we own or provide access to the appropriate resources is spread among the entire staff. It is included here because several of us provided support for this essential work.

Completed!!! the process of evaluating books remaining in the collection without **barcodes** indicating they are not in III. Withdrew, moved to another library or arranged for cataloging so that, with rare exception, all held items are in the catalog.

Budgeted for, supported the library liaison assigned with improving the **Canon** literature collection and spent \$2000 to replace tattered or ugly editions of classic works

Created Library **Liaison Tool Kit** and established it as a key resource.

Cindy Badilla-Melendez, Cathy Lutz and Linda Hulbert served as **liaisons** for, respectively, Modern Language and Theater, Music and Political Science. In those roles they evaluated collections for additions and deselection and taught classes and Cindy and Linda maintain their web presence.

Continued to weed the OSF **music** book collection. The music reference collection was thoroughly weeded (with Susan Price) in August 2008. No work was done on the circulating collection.

Initiated discussion on **recalling** books after two weeks loan. Brought the issue to the Library Faculty Advisory Committee and got their approval to proceed. Working through the details with CLIC. We intended to implement in the Spring of 09 following lengthy promotion during the fall of 08 however, CLIC asked us not to do it. We've acceded to their wishes unless we hit financial problems going forward.

Coordinated the planning and implementation of the **streaming audio** trials. Cathy led this process and worked with Conie Borchardt and Susan Price to publicize the trials to music faculty and students; coordinated the trials with the larger library/IRT streaming media project; worked with John Heintz and IRT staff to test bandwidth and other technical aspects; evaluated the products.

Acquisitions

Insure that fund **codes** and material types and formats in III correspond for statistical and financial reporting.

Completed the **fiscal** year roll. Completed final fund report

Instituted new major vendor for children's books – **Junior** Library Guild after fiasco with Borders.

Initiated a **Leisure Reading** – rental collection using McNaughton books. Not without difficulty 312 books now in the collection; none returned yet to McNaughton; renewed for 2009-10 – collection well used.

Monthly **reconciliations** to insure matching Millennium to Banner

Binding

Cataloging

Not only did we do all the new things coming into the library, but we went back for retrospective conversions in several collections without backlogs forming. Daily work now includes adding or reviewing metadata for the archival photos in ContentDM. In addition the work done to support the online catalog database insures access to information – including fixing spelling errors, and improving indexing and the management of the various fields.

Created list and deleted authority records for **ACLCSH** juvenile headings

Created and updated documentation on load profiles intended for **Batch Load** website.

Explored implementation of **Blackwell's shelf-ready** services. Led by Jane, Cathy, Lizabeth, Dan E., Deb and Cindy considered the wisdom of getting shelf-ready books from Blackwell. While the committee recommended against it and Linda carried that recommendation to LMT, there was real value in the exercise. Time saving ideas were born from the project.

Documented routine **database maintenance** procedures (create lists).

Evaluated and purchased **detection strips** from a new vendor

Prepared for **leisure reading** collection. Investigated the options associated with automating the downloading of the records from McNaughton into III. Despite all efforts, this failed to materialize due to limitations within the III software that does not allow several different load types to be used against the Extended Approval load table.

Participated in library digitization projects (**metadata**). Developed guidelines for the Ireland Native American, Temperance, and Holy Card collections and for the Special Collections Reuterdahl collection. Edited metadata for these projects and revised older metadata on other collections as needed. Arvid Reuterdahl papers digital collection: reviewed and approved metadata for images in ContentDM and standardized forms of names; drafted specific metadata guidelines

Complete general metadata standards for digitization projects. The draft document outlining core standards and guidelines for **metadata** that should be applied to any UST digital project was worked on throughout the summer and fall; however, no work has been done since December 2008. The document is nearly completed.

OPAC display issues:

- Keffer theses
- 2007 OPAC implementation
- Unicode implementation (provided test records)
- Serials Solutions MARC records in Unicode

Revised cataloging and withdrawal **procedures**

Reference Resources Search – implemented new service. To do so: set up new location codes, worked with Ben on layout and functionality; created test records, tested; rapid/global update of item locations and bibliographic subject headings.

Reviewed **Release 2007** documentation for new features to implement

Accepted the **Rush** CDs and cataloged them.

In an effort to improve the quality of the **Serials Solutions** bibliographic records, created spreadsheets of their records with 7XX linking fields lacking |t or |s and sent to them

Implemented new **spine** labels

Globally **updated 856** |z for free websites in CLICnet per CLIC catalogers.

Media Center (for more detail see the Media Center report)

Collaborated and pursued **Licensing** for Public Performance Rights for festivals and forums from several departments of the university and collaborated with the organization and promoting the activities

Continued the process of **replacing** VHS's titles with DVD's.

Streaming video pilot project (20+ titles) is up and running (digital licenses acquired, videos tested, videos cataloged, added to Library's catalog, media page and database page).

Serials and Electronic Resources:

Periodicals

Implemented **Counter** Statistics from Serials Solutions (ERMS). Implemented, tested, failed the testing; reimplemented; reimplemented; reimplemented.... Huge support from Dani, Carolyn, Lisa and Dan E.

New **Database** evaluation tool developed, tested, launched.

Managed **desiderata** process in as open and transparent method possible

Implemented **ELM** revisions

Withdrew **library science** journals

- a. 96 titles withdrawn
- b. 1667 volumes withdrawn
- c. 3 microfilm titles withdrawn
- d. 17 reels withdrawn
- e. 13 titles changed to Limited Retention

Sent to St. Kate's

7 titles (3 full runs, 4 partial titles or single titles)

34 vols. sent

Packed periodicals for last Minitex pickup.

Revised and updated EBSCO invoice loading to III instructions and shared with CLIC

Science Direct UTL revision discussion

Continued evaluating **short** dead runs evaluated for preceding or continuing titles; evaluated for possible withdrawal

Tested new III order record pricing which permits better downloading of serials payments over time via text based system.

Standing Orders

Went through and identified which standing orders were **alive** and dead. Closed appropriately and claimed appropriately.

Identified **costs** by year using a new reporting capability from III and updated database to include those numbers to improve collection development decisions.

Continuing Education Taken and given

Authority training from Minitex and CLIC
Captivate
Cataloging from Minitex
Collection Management and Services Retreat
ContentDM User Group meeting
ContentDM webinar on changes in version 5 upgrade
Copyright sessions to the faculty
Dan on routine database maintenance including create lists.
Dan on cataloging support for videos
Deb on cross training in cataloging
Enhancing Quality Staff
JING training
Library retreat at the MCBA
Lisa D. and Dan on implementing Counter statistics
Lizabeth on authorities for handling author first time use list
Midwest Technology Conference (MAC)
Minnesota Library Association meeting
Minitex ILL conference with Marshall Breeding
Minitex/OCLC users group meeting
MNIUG
NASIG
National Media Market conference
OCLC Expert Community webinar
OCLC User Group Meeting on technical services workflow
Office 2007 tips and tricks
Orientations: Ben Durrant, John Heintz, Ryan Carter,
Paddy Satzer on Serials Solutions and Counter
Serials Solutions E-Book webinar
Sharepoint (by Brian Hill)

Teaching and liaisons:

Comparative religion class
International class
Latin American culture and civilization
Modern Language
Music and music education departments
Spanish 300
Theatre

CLIC Committee Membership

Acquisitions Committee
ASA
Authorities (COI)

AV (COI)
Batch Loading (COI)
Catalogers Committee
Cooperative Collection Development (COI)
Digitization COI
E-journals
MARC from Serials Solutions proposal
Executive Director search
MART
OPAC
Serials committee

University/Library Committees

All Staff Council
Banned Book week
Budget Meetings to reconcile III to Banner/financials
Collection Management
ContentDM
Digital Asset Management (Uber DAM)
Digital collections committee (Library)
Diversity Working Group
Supported French Film Festival
HART
Holiday Party committee
Info Fair staffing
International Students
Intranet/Sharepoint committee
Liaisons meetings
Library Week

- Book Sale
- Faculty author reception
- Planning committee

Millennium Module Support Team (MMoST)
New student orientations
New student worker orientations
Preservation
Reorganization
Library Retreat
Sacred Arts Festival
Senior Citizen Tour
Space committee
SSLRT
Staff development committee
Student supervisors
Student orientation for international students
UST booth at the State Fair
Web work:

- investigated UST Portal and where can the libraries be inserted
- Web Advisory Group

State/National service:

MW Chapter liaison to library science program at College of St. Catherine
Midwest Chapter, MLA
Music Library Association (MLA)
Music Users OCLC Group (MOUG)
NASIG
NISO CORE

Publications and other creative activities

Dani did a presentation to **CLIC** on Counter

Dani, Lisa D., Dan E. and Carolyn presentation to the **liaisons** (and others) on Counter

Dani and Carolyn presentation to the **liaisons** (and others) on ERMS

Dani and Carolyn presented at the **Midwest Library Technology Conference** at MAC on implementing an ERMS.

Dani presented at **NASIG** on participating on a NISO committee.

Dani created and uploaded instructions on Cost exchanging to serials solutions for III.

Statistics that everyone wants to know as of June 30, 2009:

Volumes: in the libraries (Item records with ti, tk, to, tm):

Ireland:	108,633	Includes bound serials
Keffer	42,894	Includes bound serials
Law	207,668	
MuRC	7,925	
OSF	302,529	
MeRC	7,036	
OSF bound	59,746	
TZ	<u>93,160</u>	
All UST	829,591	

Titles: in the library (search Bib location ^ with T_ and item location ^ T_)

Ireland:	71,846	
Keffer	30,957	
Law	159,015	
OSF	256,795	
MuRC	6,823	
TZ	<u>93,160</u>	(includes ebooks and e-serials and databases)
	618,596	

Book volumes (mat type b with bib location ^ t and item location starts with ti, tk, to, tm):

Ireland:	87,647
Keffer	30,393
Law	161,970
Music	3,392
OSF	<u>269,705</u>
	553,107

Current Serials purchased – not including electronic

Ireland	410
Keffer	299
OSF	<u>1,156</u>
	1,865 [n. b. can't do law]

All UST **print serial titles held** (Data from serials database and III):

Ireland:	1,186	
Keffer	811	
OSF	5,278	
Law	<u>3,757</u>	(III search mat type = p; i location ^ tl NOT tlweb)
	11,032	serial titles (dead and alive and not database provided)

Electronic resources:

- Databases:** 232 (from Serials Database by format – doesn't match SerSol)
- Electronic journals:** 39,251 (deduped, unique titles to which we all have access)
- Electronic journals that are included above but we are acquiring in electronic format only:** 240 (2007-2008: 217) (2006-2007:153) (2005-2006: 102)
- Electronic books:** 95,037 Call Stephanie at Seminary with these numbers 2-5063 [bib mat type = x and bib location ^ t]

Microforms sheets and rolls

Ireland: 1,249
 Keffer 835,656
 OSF 181,754
 1,018,659

Microform subscriptions: OSF, Keffer, Ireland : 33

Audiovisual pieces (includes CDs, DVDs, Videos, Ips)

Ireland: 51
 Keffer: 214
 Law: 211
 MURC 4,488
 OSF 7,047
 12,011 (2003-2004: 4,423)

Gifts received:

401 Hardback books
 567 Paperback books (and loose issues)
57 Other (includes videos, kits, scores etc.)
 1025 Of this 277 gifts were added. (27%)

Expenditures by format for Ireland, Keffer, Special and OSF

	% increase decrease	2008-2009	% increase decrease	2007-2008	% increase decrease	2006-2007	% increase decrease	2005-2006
Books includes ebooks (typically single purchases) includes external funds	7%	\$249,395	16%	\$232,557	3%	\$199,790	30%	\$193,438
Print Periodicals	4%	\$342,564	6%	\$330,537	-1%	\$312,762	-13%	\$315,425
Electronic Periodicals	39%	\$148,890	48%	\$106,846	26%	\$72,321	33%	\$57,612
Standing orders:	-16%	\$70,918	-35%	\$84,449	-9%	\$129,340	-9%	\$142,357
Microforms:	11%	\$29,865	3%	\$26,809	2%	\$25,967	-8%	\$25,541
Electronic resources (databases & tools)	11%	\$768,236	12%	\$690,769	5%	\$616,265	29%	\$588,104
Audio-visuals	-4%	\$55,749	37%	\$58,100	25%	\$42,408	21%	\$33,934
Binding/Preservation	-19%	\$22,114	10%	\$27,202	0%	\$24,700	-5%	\$24,683
	8%	\$1,687,731	9%	\$1,557,269	3%	\$1,423,552	11%	\$1,381,094

Serials Solutions records in CLICnet as of July 15, 2009

Full records: 20,881 change from 2008: 788
 Brief records: 17,181 change from 2008: -1154
 Total: 38,062 change from 2008: -366

Activity (all formats)	2008-2009	2007-2008	2006-2007	2005-2006	2004-2005	2003-2004
New Titles Added	10,044	8,259	8,293	12,947	14,919	8,431
New Volumes/Copies Added	12,094	11,902	11,831	15,964	22,948	13,736
Titles Withdrawn	1,452	923	1,657	3,004	3,861	716
Volumes/Copies Withdrawn	5,666	5817	2340	2042	884	1030
Database Maintenance	53,435	40,487	99,176	36,451	26,438	14,977