

Tailoring Technical Services Data to Fit the Changing Needs of Academic Liaisons

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“New liaison roles are not emerging *de novo*, but rather in continuity with established roles.”

-Karla Hahn
Assistant Executive Director
Research, Teaching, and Learning
Association of Research Libraries

Liaison responsibility areas where reporting can help

- Selecting resources and tracking funds
- Working with emerging formats
- Managing print collections
- Maintaining approval plans
- Reviewing collections

Selecting resources and tracking funds

Personalized fund balance reports

- Regular tracking of balances, encumbrances, and expenditures
- Monthly reminder to busy liaisons
 - Liaisons appreciate the help
 - Can lead to better order pacing across the board
- Refresher on funds and allocations
 - Avoid surprises at the end of the year (hopefully!)
 - Keep the spotlight on lower-profile funds

Personalized liaison fund balance report



University of Kentucky Libraries

Monthly Fund Balance Report

December 2010

Insert Liaison Name Here

Monograph Funds

Fund Name	Allocation	Committed	Expended	Remaining Balance	% Used
- - - KED1 Education M	\$1,928.00	\$0.00	\$1,706.23	\$221.77	88%
- - - KHP1 HlthPhyEdRe	\$3,000.00	\$577.78	\$1,422.87	\$999.35	67%
- - - LED1 Education M	\$18,000.00	\$6,363.07	\$6,532.57	\$5,104.36	72%
- - - LHP1 HlthPhyEdRe	\$2,500.00	\$0.00	\$138.86	\$2,361.14	6%
- - - LJU1 Juvenile Mo	\$1,000.00	\$0.00	\$0.00	\$1,000.00	0%
Total	\$26,428.00	\$6,940.85	\$9,800.53	\$9,686.62	63.35%

Approval Funds

Fund Name	Allocation	Committed	Expended	Remaining Balance	% Used
- - - KED9 Educ Grad A	\$12,000.00	\$0.00	\$8,565.38	\$3,434.62	71.38%
- - - LED9 Educ Grad A	\$0.00	\$0.00	\$0.00	\$0.00	
Total	\$12,000.00	\$0.00	\$8,565.38	\$3,434.62	71.38%

Targets:	10/29/2010	12/17/2010	2/18/2011	2/18/2011	3/18/2011	4/15/2011
	Monograph funds 25% expelled for FY11	Monograph funds 50% expelled for FY11	E-book packages from new vendors/platforms due	Monograph funds 75% expelled for FY11	E-book packages from approved sources due.	Monograph funds 100% expelled for FY11

Notes: These numbers reflect your accounts as of December 13, 2010 and do not necessarily show account activity since then.

Working with emerging formats

- Ebook collections and usage
 - Ebook usage statistics compiled as part of collections review
 - Integrated with process for harvesting e-journal usage statistics
 - Intended to inform future purchases and continued investments in publisher and subject area collections

Working with emerging formats

- Streaming audio and video
 - Non-COUNTER compliant usage statistics also harvested as part of collection review
 - Integrated with process for harvesting e-journal and ebook usage statistics

Managing print collections

- To address physical space needs, an increasing need to work with liaisons to evaluate orphan and underused print periodical collections
- Circulation and technical services data considered together to make withdrawal and storage decisions

Liaison report for print periodicals project

	A	B	C	D	E	F	G	H	I	J	K	L
1	Title	CM	Count	Shelves	Reason	Years	Call No.	Range	Divide?	Notes	n	
2	Annual report - Carnegie Foundation for the	insert CM name	93	1	Unused	1934-1995	LB 2334 .C5	51B	No	STORAGE PERIODICAL--sent		
3	Voprosy i' a' zykznaniia'.	insert CM name	38	2.25	Unused	1965-1997	P 9 .V6	52B	No			
4	Lietuvos TSR Moksl akademijos darbai. Serija A	insert CM name	35	1.25	Unused	1955-1989	AS262 .V422	9B	No	Split into: Lituianistica, and: Filosofija, sociologija.		
9	Giornale italiano di filologia.	insert CM name	22	1.75	Unused	1955-1996	P 9 . G55	52B	No			
10	Historisch-politische Bl tter f r das katholische	insert CM name	172	9	Unused	1838-1923	D 1 .H4	16A	No	3 Bibs--Historish Politische	Storage	
11	Revue historique.	insert CM name	146	8	Unused	1866-2008	D1 .R6	16B	1920	current sub -- to remain in		
12	Radio Free Europe research.	insert CM name	113	4	Unused	1978-1990	D847 .R330	18A	No		Storage	
13	Archaeological journal.	insert CM name	39	5	Unused	1844-2008	DA20 .R86	18B	1959	current sub -- to remain in		
14	Krasny arkhiv.	insert CM name	36	2	Unused	1922-1941	DK1 .K7	20A	No		Storage	
15	New York Historical Society quarterly.	insert CM name	31	1.25	Unused	1946-1980	F116 .N638	25B	No		Storage	
16	Mo ambique, documentario trimestral	insert CM name	30	2	Unused	1940-1956	DT453 .M6	23B	No	Ceased publication?	Storage	
17	Publications of the Buffalo Historical Society.	insert CM name	29		Orphan	1953-1980	F129.B8 B88	25B	No	Ceased with vol. 42, no. 1.--	Storage	
18	Revista do Instituto Histórico e Geográfico	insert CM name	28	2	Unused	1959-1972	F2501 .I59	28B	No		Storage	
19	Aus Politik und Zeitgeschichte.	insert CM name	26		Unused	1982-1989	D839 .P2510	18A	No		Storage	
20	Revue roumaine d'histoire.	insert CM name	23	1	Unused	1962-1974	DR201 .R49	21A	No		Storage	
21	Archiv orientální : journal of the Czechoslovak	insert CM name	22	1	Unused	1953-1978	DS1 .A47	21A	No		Storage	
22	Nigeria magazine.	insert CM name	22		Unused	1960-1977	DT515 .N47	23B	No	7 vol need item records	Storage	
23	Revue d'histoire de l'Amérique fran aise.	insert CM name	22	1.25	Unused	1958-1978	F1001 .R45	27B	No		Storage	
24	Alabama news magazine.	insert CM name	22		Unused	1973-1979	F216.2 .S6	26A	No	15 vols need item records	Storage	
25	Historiallinen aikakauskirja.	insert CM name	21	1	Unused	1927-1976	D1 .H663	16A	No		Storage	
26	Zeitschrift f r schweizerische Archæologie und	insert CM name	21	1	Unused	1939-1980	DQ30 .Z4	21A	No		Storage	
27	Chinese repository.	insert CM name	21		Unused	1831-1851	DS701 .C750	22B	No		Storage	
28	Heimat.	insert CM name	20		Unused	1959-1979	DD491.S6 H4	19B	No	Publication suspended Mar.	Storage	
29	Heimat.	insert CM name	20		Unused	1959-1979	DD491.S6 H4	19B	No		Storage	
30	Jewish affairs	insert CM name	20		Unused	1960-1980	DS101 .S69	22A	No		Storage	

Maintaining approval plans

- Continued reallocation of subject monograph funds from firm orders to approval plans
- Creation of new approval plans involving liaisons less familiar with profile maintenance
- Managing evaluation of undergraduate and interdisciplinary approval plans
- Changing curriculum and access needs

Example of facilitating liaison self-service reports

Generating a List of Approval Titles Shipped

1. Click on the SEARCH Tab
2. Click on "Library Activity"
3. Uncheck "Open Orders"
4. Check "Invoiced"
5. Leave Sub-Account as is, put in an Invoice Date Range (make sure it's the Invoiced on, as the other two won't work for this)
6. Choose the appropriate fund code(s)
7. Click 'GO'

This should give a title level search of everything shipped on that fund(s) during the specified period of time.

Reviewing collections

- Current importance of collections reviews
 - Budget reductions
 - Format changes
 - Shifting curriculum priorities
 - Communication with faculty
 - Interdisciplinary programs and collections
- Review increasingly focused on electronic resources
- Opportunity to add new subscription resources and access fees

Serials title list with cancellation priorities

	A	C	G	K	L	M	N
1	TITLE	ISSN	PRIORITY	PUBLISHER	XC CODE	Intended Loc	NOTES
27	Annual review of United Nations affairs.	0066-4340	3	OCEANA PUBLICATIONS INC	~Print Only~	Young Reference	Use for PAIS
42	Behavioral and brain sciences [electronic resource].	1469-1825	3	CAMBRIDGE UNIVERSITY PRESS	~E-Journal~	INTERNET	
69	CRC critical reviews in solid state and materials sciences [electronic resource].	1547-6561	3	TAYLOR & FRANCIS	~E-Journal~	INTERNET	
70	Daily independent.	0744-6837	3	ASHLAND DAILY INDEPENDENT	~Microform~	YOUNG LIBRARY PNM COLL	
100	Innovations in education & teaching international [electronic resource].	1470-3300	3	TAYLOR & FRANCIS	~E-Journal~	INTERNET	
101	International journal of coal preparation and utilization [electronic resource].	1939-2702	3	TAYLOR & FRANCIS	~E-Journal~	INTERNET	
102	International journal of computer integrated manufacturing [electronic resource].		3	TAYLOR & FRANCIS	~E-Journal~	INTERNET	
331	George Herbert journal.	0161-7435	2	SACRED HEART UNIVERSITY	~Print Only~	Young Periodicals	
332	Georgia review.	0016-8386	2	GEORGIA REVIEW UNIV OF GEORGIA	~Print Only~	Young Periodicals	
333	Gesamtausgabe der Bayerischen Akademie der Wissenschaften. Hrsg. von Reinhard Lauth und Hans Jacob.		2	FROMMANN-HOLZBOOG E.K. STUTTGART	~MSS/STANDING ORDER~	Young Library	
334	Government periodicals universe [electronic resource].		2	CONGRESSIONAL INFORMATION SERVICE	~Access Fee~	INTERNET	
387	Moths of America north of Mexico, including Greenland.		2	E. W. Classey	~MSS/STANDING ORDER~	Young Library	
388	Mountain geologist.	0027-254X	2	ROCKY MT ASSN OF GEOLOGISTS	~Print Only~	Geol Serials	
453	Yearbook of Langland studies.	0890-2917	2	BREPOLS PUBLISHERS	~E-Journal~	Young Per a+l	
952	Chronicle of higher education.	0009-5982	1	CHRONICLE OF HIGHER EDUCATION	~Microform~	Young Per D Microfilm	
2124	Lexington herald-leader.	0745-4260	1	LEXINGTON HERALD-LEADER	~Print Only~	Agric Serials	
2288	Mutual Fund Ownership Current & History [electronic resource]		1	THOMSON REUTERS	~Database~	INTERNET	
2397	Optics letters [electronic resource].	1539-4794	1	OPTICAL SOCIETY OF AMERICA	~E-Journal~	INTERNET	
2755	Science of the total environment [electronic resource].		1	Elsevier	~E-Journal~	INTERNET	
2998	Transactions / Johnson Society.	0306-5375	1	JOHNSON SOCIETY/HON LIT SEC	~Print Only~	Young Per a+l	
3146	Youth & society [electronic resource].	1552-8499	1	SAGE PERIODICALS	~E-Journal~	INTERNET	
3153	Zeitschrift fur physikalische Chemie.	0942-9352	1	OLDENBOURG, MUENCHEN	~Print + E~	Chem/Phys Serials	

Academic liaisons and scholarly communication

- Understanding faculty research & publishing venues
- Recruiting institutional repository content
- Serving as intermediaries in data curation

Thank You!

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