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Adapting & Evolving: Mapping New Routes

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Adapting & Evolving: mapping new routes

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Expenditures for electronic resources account for 25% on average, of ARL institutions’ library materials budgets.

ARL libraries reported spending more than $228 million on electronic resources.

ARL libraries reported a total of $21,470,716 in additional funds spent on their behalf through a centrally funded consortium for purchasing electronic products and services.

Expenditures for electronic serials have increased by 171% since the 1999-2000 survey and by more than 1800% since they were first reported, in 1994-95.

In every year since 1992-93, average expenditures on electronic resources have increased at least twice as fast, and in some cases more than six times faster, than average library materials expenditures.

http://www.arl.org/stats/annualsurveys/sup/index.shtml
What’s new?

- Electronic journal management
- Licensing agreements
- E-books
- E-reserves
- Vendor data loads
- OpenURL link resolvers
- Counter compliant use statistics; SUSHI
- Archiving and data management issues (Portico; LOCKSS)
- Digital rights management
- Cataloging (RDA, FRBR)
- Metadata (EAD, METS, MODS, Dublin Core)
- Federated search engines
- Institutional repositories
Recent Positions

- Digital Resources Cataloger
- Assistant/Associate Dean for Collections and Scholarly Services
- Digital Collections Coordinator
- Digital Projects and Catalog Management Librarian
- Head of Information Acquisitions & Management (medical library)
- Digital Services Librarian
- Metadata/Cataloging Librarian
- Metadata Librarian, Cataloging & Metadata Services Department
- E-Learning Services/Reference Librarian
- Metadata Services Manager
- Assistant Dean for Digital Futures and Technical Services
- Digital/Tangible Media Cataloger
Examples of workflow changes

- Merging acquisitions and copy cataloging
- Creation of a separate electronic resources unit
- Creation of a metadata cataloging position or unit
- Teams to deal with implementation of link resolvers and federated search engines
- Changing from printed theses and dissertations to electronic versions including systems and cataloging changes
- Increased collection development collaboration
- Closer working relationships between electronic resources, serials, bibliographic access, and public services

- Workflows that cross traditional departmental or division lines

- Workflows with added complexity

- Processes that include the need for more people and systems involvement

- Evaluated and re-designed procedures and policies
Skills and expertise

- Ability to analyze data
- Data loading and management in large quantities
- Independent judgment and decision making skills
- Statistical assessment
- Project management skills
- Knowledge of current metadata schemas, standards, and protocols
- Knowledge of OpenURL link resolvers
- Knowledge of electronic resources management systems
- Ability to work within and across departmental lines
- Creativity
- Advocacy
- Sense of adventure and curiosity
- Willingness to experiment
- More and varied information technology skills
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EXPERIENCE
Prior to reorganization the process had been decentralized.

Complicated form used to attempt to track an electronic resource from point of order through cataloging

This was not working for us
Changes

- Reporting lines
- Form made more usable
- Positions added
- Workflows clarified
Reporting Lines

- New structure – Acquisitions, Collection Development and Cataloging for all areas except Medical Center and Law reported to one person
- Medical Center licensing, some invoicing and cataloging handled centrally
- Easier to disseminate information, update procedures, coordinate activities
Electronic Resource Form

- Simplified to the essential information to get a requested started
- Compliance made mandatory
- Form once completed goes to single person to be recorded and start the process
- Covers trials, wish items or items with identified funding
Position Changes/Additions

- Electronic Resource Coordinator
- Senior Library Technician
- Student Budget resources allocated
- Time from other staff as appropriate
  - Acquisitions person works 2 hours per week checking links from list
Workflows

- Recognition that this is not a linear process
- Close cooperation from all parties involved is needed
- Need to be adaptable and alert to ways to prevent bottlenecks or items disappearing into black holes
Workflows

- Electronic resource form
- Vetted by ER coordinator and IT if from new source
- Purchased approved by Collection Advisory Committee
- Licensing issues handled between ER coordinator and Associate Dean
Workflows - Continued

- Purchase order created in Voyager
  - Mini bib suppressed until link is active
  - Full level record suppressed until link is active
- Item set up in SFX and local database
- When URL active, information passed to Database Integrity for final cataloging in Voyager.
Workflow

- Database Integrity updates electronic record
- If a print journal record is present in Voyager, 776 linking field added
- If print is replaced by electronic, then print is closed out.
- Database Integrity reports close out to Senior Serials Technician in Acquisitions
Workflow - Continue

- If packages are purchased they follow a similar model, except the purchase order is usually on package level record and a spread sheet of the individual titles goes to Database Integrity

- MARC records may also be purchased and loaded if appropriate and are currently handled by Head, Acquisitions.
Future Developments

- Transitioning print staff to handling electronic as our print needs decrease
- Effective and routine handling of the purchase of e-books
- Local database phased out in favor of Electronic Resource Management system and SFX A-Z list
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