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
BACKGROUND

- 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 bottle necks 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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