

1-1-2008

## Collection Development & Technical Services Department : Annual Report : 2007 - 2008

Nelson Poynter Memorial Library.

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### Scholar Commons Citation

Nelson Poynter Memorial Library., "Collection Development & Technical Services Department : Annual Report : 2007 - 2008" (2008). *Library Department and Committee Reports*. 40.  
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## COLLECTION & TECHNICAL SERVICES

### ANNUAL REPORT 2007-2008

Patricia Pettijohn

Statistics (all statistics as of 30 June 2008)

Periodicals Titles (with MS)	462
Serials Titles:	119
Total	581

Periodical Titles purchased, without MS or electronic	329
Electronic Titles purchased	113
Total Per. Titles purchased with elec.	442
Total Per + Serials, without MS	561

Periodical issues received:	3,474
Serials volumes received:	189
Claims placed:	242
Claims received:	58
Books repaired:	94

Microforms (Total)	919,510
Microfiche (Total)	907,705
Microfilm (Total)	11,805
Eric (Microfiche)	569,600
Sets (Microfiche)	138,606
Periodicals (Total)	203,028

Periodicals/Serials (Total)	203,217
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Monographs	
Volumes Held	227,733
Volumes Added	4,683
Volumes Withdrawn	185
Total Volumes Held	232,231

The onset of the 2007-2008 fiscal year marked a turning point in the development of the Collection & Technical Services Department, as the department gained full responsibility for previously outsourced technical service processes and procedures. Project planning identified staff training as a key element in a successful transition to full autonomy in library acquisitions and cataloging, as well as requiring extensive documentation of processes and procedures. Training and documentation was developed for ALEPH modules in acquisitions, cataloging and serials management, as well as for use of OCLC PromptCat, and vendor databases, such as EBSCO and YBP's GOBI. A series of staggered training sessions were arranged through

varied sources: Staff met for brief training with key USF Library personnel, and basic and advanced training of staff in cataloging was achieved through attending TBLC workshops throughout the year. Weekly training for all staff was developed, initially using online training materials developed by ALEPH, before establishing a regular schedule of staff training, developed by David Cipris, Library Operations Manager. Key staff members received training in the USF finance and accounting system, FAST.

Through a series of conference calls and electronic communications, with FCLA, USF Tampa, and vendor representatives, Poynter Library established the following new protocols:

## SERIALS, CONTINUATIONS, MICROFORM, & PERIODICALS

- **Serials Review**

All active orders for serials, standing orders and continuations were reviewed before being reestablished with vendors, as orders formerly handled by USF Tampa required new reference numbers and new accounts had to be created. In many cases inactive orders were forwarded to vendors as part of system order reports generated by USF Tampa during the transition, requiring title level review of older orders.

- **Electronic orders, renewals and electronic invoicing**

Processes and procedures for downloading subscription renewals and invoices through Ebsco, our major periodicals vendor, were not functioning by the time of the Fall 2007 renewal, but were in place by the Spring 2008 renewal. This involved extensive trial and error to perfect. All vendor reference numbers had to be checked and corrected in ALEPH to allow data overlay, on a title by title basis. At this time, an additional review of periodical titles for potential cancellation was completed.

- **Weeding Project Review**

In preparation for a large-scale weeding project planned for Summer 2008, periodical holdings were reviewed and compared with holdings in JSTOR and Project Muse, and identified for weeding.

- **Microform Cancellation Project**

During the annual microform subscription renewal, titles were reviewed, and titles that had become available online were cancelled. When budget considerations required large cuts be made later in the fiscal year, after review with the Library Dean, all microform subscriptions, with the exception of the St. Petersburg Times, were cancelled. Having come after the initial

renewal, these cancellations required considerable oversight to ensure that credit refunds were obtained.

- **Periodical Retention Project**

Retention policies for all frequently issued and popular periodical titles were reviewed with the goal of freeing space in the periodicals stacks. Retention policies were reviewed for all titles where microform was cancelled, as this had been the archival format of choice in the past, and JSTOR does not provide access to recent issues. With the cancellation of microform beginning with 2007-2008, the most recent five years of print will be retained.

## MONOGRAPHS

A busy year for monographic acquisitions, during which time the department not only took on autonomous ordering, invoicing and cataloging of books, but revised the YBP approval profile, rewrote the YBP specifications, and managed the transition to electronic batch-loading of orders, invoices, and bibliographic data.

Staff participated in TBLC training in Library of Congress subject headings and classification, copy cataloging, advanced cataloging, cataloging of sound recordings and media, MARC21, Dewey classification, and

### Staffing

The new Sr. Clerk position this year, a transfer from another campus department, needed an extended training and evaluation period. This was completed before the end of 2004.

### Government Documents.

There is not a separate government documents collection at the library therefore no separate statistics have been kept. Both monographs and serials are included in the regular counts for those types of materials. Our serials for documents are handled through Bernan.

Orders for individual titles from GPO are handled through a Deposit Account. In the past several years the number of titles ordered this way has decreased significantly, primarily due to the major decrease in publishing by the GPO and the availability of some information in online form only. A larger number of print titles were available for purchase this year. 24 individual titles were ordered.

## Book Repair

118 books were repaired this year.

## Aleph Implementation Team

This team was active this year. Much of the change to the new Aleph LMS will have an impact on this Department. Activities in the summer and fall were based on decisions about how the database will be constructed ( and how it may differ from NOTIS) and in overview training.

Several members of the library attended an introductory session in Feb.

Functional training is expected in May with a STP (Switch to Production) date sometime in June.

## Retirements

An important aspect of the activities in the department this year revolved around the expected retirement of the Librarian and the Sr. LTA within a week of each other at the end of spring semester. This will result in the loss of 40 years combined experience in the department and a great deal of institutional memory. Procedure manuals have been updated as much as possible.

However these are of necessity NOTIS intensive, and with the change to Aleph, most of the procedures will have to be changed anyway.

## Assessment

In the fall semester, the procedure involving periodical cards was analyzed. We have been maintaining a holdings record for periodicals since the card catalog was discarded. This was discontinued, partly due to the recognition that the information was seldom used now that the online catalog and other access information to electronic journals is so good, and partly because of the need for space to extend the computer terminals in the reference area would have caused the card file to have been moved anyway. As a result a great deal of time previously used in maintaining this no-longer-used resources has been saved.

In the spring semester the procedures used for claiming periodicals was considered.

Up until this year it was the normal procedure to begin the process of claiming a missing or late issue by keying in a sumi code on an M statement in Notis. This would generate a claim report that would print out in Tampa and then be forwarded on to St Pete. For years this was done in a timely fashion and claims could be done expeditiously and within the time frame allowed for claims.

Beginning this year the claim reports were not sent to St Pete on a regular basis and in some cases by the time the claim report was received, the time limit for claiming issues had expired. Due to the range of information available on Ebsco's online claiming service, it was decided that it was no longer necessary to generate a claim report. It is much more efficient to have staff members who discover missing issues or lapsed subscription situations print the portion of the opr that contains the missing or lapsed issues, make a note of what issues need to be claimed, and give the printout to the LTA in charge of claiming. Then the LTA could immediately go online and claim the issue.

This has resulted in more efficiency in the claiming process and better response to claims from the publisher.

## DISASTER RECOVERY PLAN

## ASSESSMENT OF MONOGRAPHS PUBLISHED BEFORE

USF Graduate School of Library & Information Sciences fieldwork internship

## GIFTS & ACQUISITIONS

With budget cutbacks we added gifts that we had been unable to process, such as the John M. Phelps collection. Donated in 2005, this gift of approximately ? books, while focused on the

history of World War II and Holocaust studies, included a number of titles focused on Beat generation authors.

Through the generosity of ?, the ? collection of Africana studies

The Spanish stuff

the Cunningham collection of materials supporting the study of semiotics in education, with a number of titles by and about the work of Peirce

YBP

Revised approval profile

Revised specifications

EBSCO

First successful EDI transactions, downloading renewals and invoices into ALEPH.

MEETING, APRIL 22, WALKER GRODIN, EBSCO

Cancellations

Withdrawal project for Summer 2008, project plan created Spring 2007, to identify titles where perpetual access to digital content is ensured through purchase, rather than licensing, of content.

STAFF TRAINING & DEVELOPMENT

DAVID CIPRIS

USF TAMPA ALEPH TRAINING

JULY 20, 2007

JULY 25, 2007

USF TAMPA FAST TRAINING

AUGUST 21, 2007

ANNE KILLENBERG

USF TAMPA ALEPH TRAINING

AUGUST 16, 2007

TBLC

BOOK BLITZ III

MARCH 4-5, 2008

MARC21 In Your Library March 3, 2008

PATRICIA PETTIJOHN

USF TAMPA ALEPH TRAINING

AUGUST 21, 2007

AUGUST 28, 2007

SOLINET TRAINING

AUGUST 31, 2007

TBLC ?

OCTOBER 18, 2007

MEET WITH DR. ALEXANDER, INTERN OCTOBER 25, 2007

OCLC WORKCAT COLLECTION ASSESSMENT

OCTOBER 25, 2007

LIBRARY FOCUS GROUP 1

DECEMBER 5, 2007

LIBRARY FOCUS GROUP 2

APRIL 10, 2008

TBLC LIBRARY FUNDRAISING

Library Fundraising: Creating New Streams of Revenue for Your Library

FEBRUARY 14, 2008

Patricia Pettijohn, you are signed up for Allocating Space in Your Library to Meet Changing Needs on 2007-10-16

TBLC Collection Development & Acquisitions SIG meeting

OCTOBER 18, 2007

FEBRUARY 27, 2008

AFRICANA STUDIES WORKSHOP 7/16-7/17/07

ANNE KILLENBERG

USF TAMPA ALEPH TRAINING

AUGUST 16, 2007

ALEPH TRAINING

Occurs every Wednesday effective 5/30/2007 until 7/25/2007 from 10:00 AM to 11:00 AM.

### **BIBLIOGRAPHIC INSTRUCTION**

Cultural Anthropology, Weedman, September 6, 2007, Sept. 6, Davis 103, 50+ students.

African Diaspora in America, Weedman, Anthro, October 2, 2007

Social Work Research, Susan Allen, CAS, SW, January 24, 2008

Magic and Religion, Weedman, Anthro, January 28, 2008

OBSERVATIONS 10/21/07-10/26/07

OBSERVATIONS 3/2/08-3/7/08

KAY FRANCES MARSHALL

DEWEY DAYS, TBLC MARCH 6, 2008

MARC21 In Your Library, March 3, 2008

JUST FOR COPYCATS, JUNE 9-10, 2008

SOLINET CONSULTANT MAY 13-15, 2008