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

Heath Martin & Ashley Tussing
University of Kentucky Libraries

"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

		IVIO	onthly Fund	Balance Ro ber 2010	eport	
			Insert Lia	aison Name Here		
onog	graph Funds					
	Fund Name	Allocation 🔽	Committed 🔽	Expended 🔽	Remaining Balance	% Used 🔽
	KED1 Education M	\$1,928.00				88%
	KHP1 HithPhyEdRe	\$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 HtthPhyEdRe	\$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%
prov	val 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%
ets:	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

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

	■ NEWEST 3rd floor to storage_COLLDEV COPY [Read-Only]													
4	A	В	С	D	E	F	G	Н	1	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 PERIODICALsent				
3	Voprosy i a zykoznanii a .	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: Lituanistica, 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 BibsHistorish 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			
20	Tewish affairs ✓ ► ► Question Marks Count=20+ Cour	insert CM name nt=10-19 Coun	20 t=5-9 /	Count=2	Umised 4 Cou	1960-1980 nt=1-1.5	DS101 S69	2.2.A	No	Ш	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

- Click on the SEARCH Tab
- Click on "Library Activity"
- Uncheck "Open Orders"
- 4 Check "Invoiced"
- 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)
- Choose the appropriate fund code(s)
- 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

4	А	С	G	К	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+I	
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+I	
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	

Usage statistics compiled for collections review

1	Journal Usage for FY10													
						Total FY10	July	December	January	June				
2	Title	Publisher	Platform	Print ISSN/ISBN	Online ISSN	Usage	2009	2009	2010	2010				
	AACE International Transactions	American Associat	ProQuest			1	0	0	1	0				
10080	Society & Animals	Brill Academic Pub	EBSCOhost	1063-1119		104	0	19	2	5				
10081	Society (Springer)	Transaction Publisl	EBSCOhost	0147-2011		371	19	26	19	2				
	World Policy Journal	The MIT Press	Project MI	0740-2775	1936-0924	0	0	0	0	0				
13774	World Politics	Cambridge Univers	Project MI	0043-8871	1086-3338	175	2	18	8	7				
14157	World Journal of Biological Psychiatry	Informa Scandinav	Informa Ph	1562-2975	1814-1412	3	0	0	1	0				
14158	Xenobiotica	Informa Healthcar	Informa Ph	0049-8254	1366-5928	117	12	4	16	17				
14349	Kybernetes	Emerald	Insight	0368-492X		25	0	1	0	3				
14350	Leadership & Organization Development Journal	Emerald	Insight	0143-7739		70	5	3	0	5				
14353	Library Consortium Management: An International Jou	Emerald	Insight	1466-2760		0	0	0	0	0				
25881	AJIC: American Journal of Infection Control	Elsevier	Ovid	0196-6553	1527-3296	41	2	1	1	0				
25887	American Journal of Clinical Oncology	Lippincott Williams	Ovid	0277-3732	1537-453X	163	9	13	24	4				
25888	American Journal of Community Psychology	Kluwer Academic F	Ovid	0091-0562	N/A	6	1	1	0	0				
29564	Diamond and Related Materials	Elsevier	ScienceDir	0925-9635		5	0	0	0	0				
30680	Tetrahedron Letters	Elsevier	ScienceDir	0040-4039		3716	358	219	249	338				
30681	Tetrahedron: Asymmetry	Elsevier	ScienceDir	0957-4166		689	66	40	47	54				
30682	The American Journal of Cardiology	Elsevier	ScienceDir	0002-9149		1854	132	136	126	104				
31289	Systems, Man, and Cybernetics, Part B: Cybernetics, IE	IEEE	IEEE Xplore	1083-4419		31	3	0	1	0				
31290	Systems, Man, and Cybernetics, Part C: Applications an	IEEE	IEEE Xplore	1094-6977		19	1	0	1	0				
31291	Technology and Society Magazine, IEEE (1988 -)	IEEE	IEEE Xplor	0278-0097		18	0	3	0	1				
35362	World Journal of Microbiology and Biotechnology	Springer	MetaPress	0959-3993	1573-0972	122	4	7	16	3				
35363	World Journal of Pediatrics	Springer	MetaPress	1708-8569	1867-0687	9	0	1	1	0				
35600	Journal of Rheology	SOR	Scitation	0148-6055	1520-8516	18	4	0	5	4				
35601	Journal of The Electrochemical Society	ECS	Scitation	0013-4651	n/a	1028	35	74	115	86				
	Joint Commission Benchmark	Joint Commission F	_			96	1	2	1	17				
37178	Joint Commission Journal on Quality and Patient Safety					391	27	22	18	20				
37179	Joint Commission Perspectives	Joint Commission F	IngentaCo	0277-8327	<u> </u>	194	22	10	5	8				
37180	Joint Commission Perspectives on Patient Safety	Joint Commission F	IngentaCo	1534-5181		101	11	5	4	8				
37181	Joint Commission: The Source	Joint Commission F	IngentaCo	1542-8672		82	10	1	5	7				
37608	Novel: a forum on fiction (Brown Univ., Providence, RI)	Novel, Inc:⊡	Literature	0029-5132		114	7	17	0	5				
37710	Virginia Quarterly Review: a national journal of literatu	University of Virgir	Literature	0042-675X		49	19	3	1	5				
37728														
37729														V
14 - 4 →	Journal Usage-Counter Journal&DB Usage-N	onCounter 📈 eB	ook Usage-	Counter 🦯 eBook U	sage-NonCount	er / Color Co	de Key	₹ 214			Ш		•	

Informed decisions: Usage stats in collections review

Co	ompiled Serials Decisio	ns													
			А	С	G		K	L	M	N					
			TITLE	ISSN	PRIORITY	PUB	LISHER	XC CODE	Intended Loc	NOTE	ES .				
1	AIDS education and pre	venti	ion	0899-9546		3 GUILFORD PUB	ICATIONS INC	~Print + E~	Young						
19	Alba education and pre	venti	on.	0899-9940		J GOILI OND FOD	LICATIONS INC		Periodicals						
78	Economic history review	v [ele	ectronic resource].	1468-0289		3 WILEY/BLACKW	ELL	~E-Journal~	INTERNET						
79	Economics & politics [e	onic resource].	1468-0343		3 WILEY/BLACKW	ELL	~E-Journal~	INTERNET							
	Merrill-Palmer quarterly.			0272-930X		3 WAYNE STATE U	INIVERSITY PRESS	l	Education						
169	Quarterly journal of spe	ech		0033-5630		3 TAYLOR & FRAN	ICIS	~E-Journal~	Library INTERNET	Format cha	ange				
217	Quarterly journal of spi	eccii.	•	0033-3030		J IAILON & I NAN	icis	L-Journal	INTERNET	in 2011	unge				
218	Rationality and society	[elec	tronic resource].			3 SAGE PERIODIC	ALS	~E-Journal~	INTERNET						
262	Wood science and tech	nolo	gy [electronic resource].	1432-5225		3 SPRINGER		~E-Journal~	INTERNET						
	World politics.			0043-8871		3 CAMBRIDGE UN	IIVERSITY PRESS	~E-Journal~	INTERNET	Format cha	_				
264										2011. Also Project MU					
	Animal biotechnology.	al biotechnology				TAYLOR & FRAN	ICIS	~E-Journal~	INTERNET	Format cha					
284		man stocker moregy.				2				2011					
	Applied mathematics a	4	A			В	С	D	E	F	G	L	M	R	4
		Applied psycholinguis 1 Journal Usage for FY10											_		
	Applied psychological						-1.0	<u>Print</u>		Total FY10		December	January	<u>June</u>	
	Feminist review [electr		<u>Title</u>			<u>Publisher</u>	Platform	ISSN/ISBN	ISSN	Usage 118	July 2009	2009	2010	2010	_
342	Freshwater biology [el		AIDS Education & Prevention				Guilford Publica EBSCOhost		0899-9546				6	6	
	Geophysics.	_	The Economic History Review			Wiley	Wiley Interscie			5	1	0		1	_
1405		_	Economics & Politics			Wiley	Wiley Interscie	0272-930X	1468-0343	01	. 0	0	0	0	
	Journal of molecular s	-	MerrillPalmer Quarterly Quarterly Journal of Speech			Wayne State Un National Comm		0272-930X 0033-5630			7	9	7		
	Philosophical quarter		Rationality and Society (Subscriber	·ID• 107015\		SAGE Publicatio			1461-7358	22		3	1	0	_
3168	Zeitschrift fur physika	_	Wood Science and Technology	10. 10/013			MetaPress	0043-7719	1432-5225	26		1	1	3	
3100			World Politics			Cambridge Univ		0043-8871	1086-3338	175	_	18	8	7	7
		_	Animal Biotechnology			Taylor & Francis	-	1049-5398	1532-2378	6	0	1	0		2
	-	12 Applied Mathematics and Computatio		ation		Elsevier	ScienceDirect	0096-3003	1202 2010	207	16	13	-	8	
	-	_	Applied Psycholinguistics			Cambridge Univ		0142-7164	1469-1817	0	0	0	0	0	
			Applied Psychological Measuremen	nt (Subscriber ID		SAGE Publicatio			1552-3497	132	. 14	8	4	3	3
		15 Feminist Review			Routledge, part	_		1466-4380	0	0	0				
		16 Freshwater Biology			Wiley	Wiley Interscie			56	i 4	2	1	9)	
		17 Geophysics			SEG	Scitation	0016-8033	n/a	49	1	2	6	0)	
		18 Journal of Molecular Structure				Elsevier	ScienceDirect	0022-2860		348	44	28	22	19)
		19	The Philosophical Quarterly			Wiley	Wiley Interscie	ence 0031-8094	1467-9213	31	. 12	0	0	1	L
		20 Zeitschrift für Physikalische Chemie				Oldenbourg Wis	Atypon Link	0942-9352		39	3	2	6	1	L
		21	•												

Academic liaisons and scholarly communication

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

Thank You!

 Heath Martin hmartin58@uky.edu

Ashley Tussing
 Ashley.Tussing@gmail.com