

SUBJECT LIAISON'S GUIDE TO THE BACKROOM

What every new liaison needs
to know about technical
services processes



*Krista Schmidt
&
Tim Carstens*

Collections Advisory

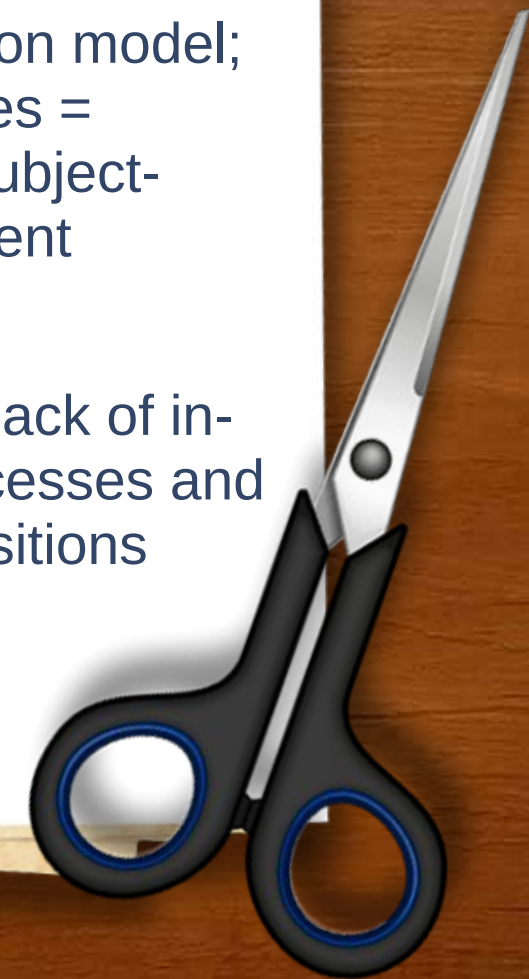
BACKGROUND

Tim = Department Head: Technical Services

Krista = STEM Liaison

Hunter Library uses the liaison model; liaison primary responsibilities = reference, instruction, and subject-specific collection development

Recurring issues related to lack of in-depth understanding of processes and procedures related to acquisitions



IMPORTANCE

Collection development often an elective in degree programs; usually focuses on philosophical issues rather than technical processes.

Even when experienced in other libraries, many new liaisons without practical experience in the technical aspects.

Details of processes are institution-specific

Prioritization of training new liaisons focuses on traditional areas

REASONING

- Increases effectiveness
- Speedier
- More efficient
- Creates informed liaisons
- Sets expectations



Framework

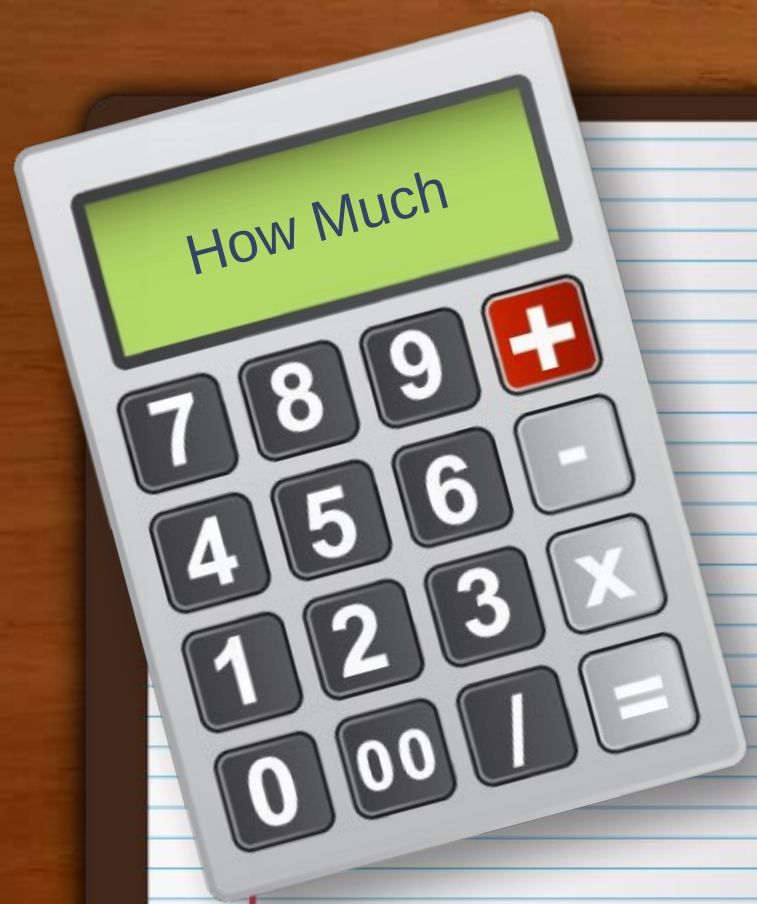


Budget & Fund Structure

Submitting Orders to Acquisitions

Acquisitions Ordering Process

Processes & Procedures for Received Materials



*Budget
& Fund
Structure*

WHY?

Strategic

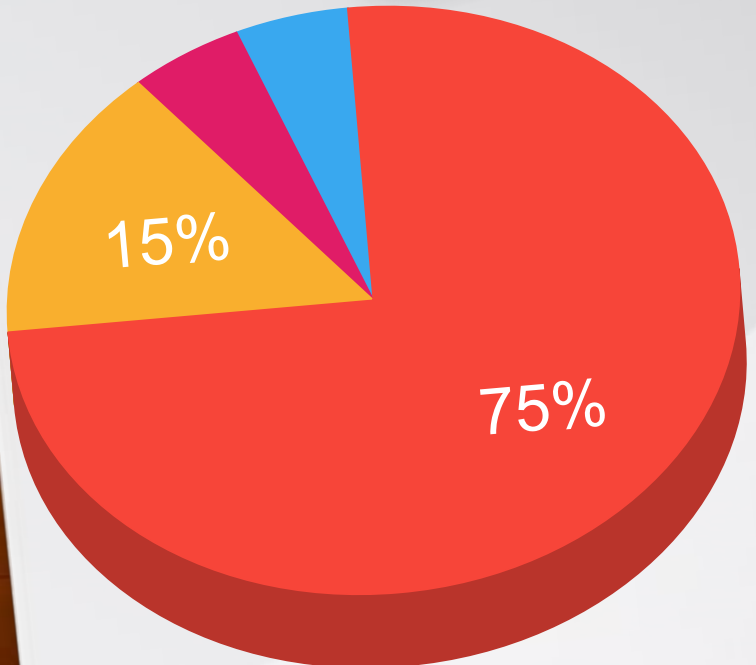
Planning for cuts, changes, additions to budget, and resource needs

Speaking the same language

Explaining in terms understood by all

Context

Framing requests, questions in appropriate budgetary context



- Contin...
- Monog...
- Audio/...
- Replac...

Budget & Fund Structure

How Much? Collections budget, liaison budget?

Who? Individual, departments, committees?

How? Allocation models, historical precedent?

Updates? How often issued, details included?

Dates? Allocations, revisions, rollovers, cutoff?

Sources? Main sources, EOY, one-time, grants



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Processes?

Format, mediation, default settings, approval plans, DDA

Information?

Publication info, codes, justification (especially continuing funds), platform

Special or unusual situations

Standing orders, unusual formats, replacement copies



Acquisitions Ordering Process

When and how?

- Submissions weekly, daily?
- Average turn-around time?
- Process for submission?
- Special information or processes needed for certain resource types?

Updates?

- Status, delays.
- Notification routines.

Problems?

- Out of print, out of stock, invalid format, price problems, duplicates.
- Decision-making processes.

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ITEMS

books

DISC	UNIT EXT	TOTAL EXT	ISBN
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0.0	472.50	472.50	9781414498843
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0.0	19.47	19.47	9781118143957
0.0	61.56	61.56	9781444337938
0.0	48.75	48.75	9780935875287

761.48

**RECEIVED
MATERIALS:**

**PROCESSING &
CATALOGING**

Sort, stamp, bug
Collection selection

Set-up



PROCESSING

Who does what how
often?

Different processes by
type.

Location(s)?

**RECEIVED
MATERIALS:
PROCESSING &
CATALOGING**

A - Z List
090 vs 050
Table of Contents
Subject Headings

Cataloging

*Who and what?
Regular/specialty/automated*

*How long?
Normal/Rush /Special Cases*

Records Customization

Location and routing

Notifications

**Liaison
Notes**

***I wish I
knew***

WISHLIST

I wish I'd had more conversations with collection development and acquisitions about known 'problem' publishers

I'm still getting the feel of what is appropriate to ask for, like how many items per semester is it reasonable to ask for as a rush?

I was surprised by the number of people involved in the processes.

Timing for acquisition of new serials can be very confusing since there can be a long time between request, approval, and access

I'm still working on understanding the default settings for ordering and when/how exceptions are made

Wish I'd asked more about how often things were updated in our ILS at the end of the year

What is the chain of command? Who notifies me for any given issue?



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**THANK
YOU!**

