

## Training Materials for Liaisons



## Boston College Libraries Collection Development: A Basic Outline

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This page lists the basic competencies and activities needed to carry out collection development at the BC Libraries. Please consult this page periodically, e.g., when composing or reviewing your Work & Development Plan.

### 1. Planning

- Prioritizing collection development among other work activities and responsibilities.
- Scheduling sufficient time for collection development.
- Identifying subject competency gaps and planning ways of learning about the subject.

### 2. Collection Development Policies

- Knowing the call numbers for the areas of subject collecting responsibility.
- Knowing the existing strength of your collections.
- Knowing the desired strength of your collections.
- Understanding how to write a policy statement and interpret it to the user community.
- Revising policy statements to reflect the changing nature of the collections.

### 3. Selection and Review Process

- Understanding the criteria for adding an item to a collection.
- Understanding the library-specific procedures for adding an item to a collection.
- Using any number of appropriate tools and methods to identify available materials.

- Developing and maintaining a regular procedure for reviewing newly received material regardless of format or process of receipt.
- Understanding any cooperative collection agreements between BC libraries and between BC Libraries and other libraries and incorporating these agreements into the selection decision process.
- Understanding the policy and procedure for reviewing gifts.

#### **4. Approval Profiles**

- Knowing how to interpret and understand each of the vendor profiles.
- Knowing how to relate the vendor profile to the collection development policy statement(s).
- Understanding how to establish and alter a vendor profile.
- Knowing how to evaluate the quality of the vendor profile in providing the materials needed for your collections.

#### **5. Budget & Fund Managing Process**

- Understanding the basis of collection development budget allocations
- Understanding what information is needed to assist in establishing budget allocations.
- Knowing how to manage your funds throughout the fiscal year.
- Knowing what possible endowment funds are available for your subject areas and what kinds of materials can be acquired with them.

#### **6. Collection Development & Other Library Departments**

- Gaining an overview of technical and other services of the BC Libraries that support or contribute to collection development and management.
- Knowing the priorities, policies, and procedures under which staff members and their departments operate.

#### **7. Marketing, Outreach, and Communication with Constituencies**

- Knowing about the various means of communicating with the user community, including BC Libraries' publicity efforts and various technologies such as e-mail and web pages.
- Developing a library liaison relationship with faculty and students.
- Being familiar with the user community profile.
- Understanding the policy and procedure for accepting gifts.

#### **8. Selector's Knowledge Base**

- Having the subject knowledge needed to accomplish tasks in collection management and development.
- Understanding the structure and publishing patterns in your subject areas.
- Being familiar with the various selection tools.

### **9. Electronic Resources**

- Keeping informed of new electronic resources.
- Knowing how to assess the quality of the resource, its search engine, and other relevant features.
- Understanding the process for selecting, acquiring, and providing access to electronic resources.
- Knowing how to use the indexes, databases, and Internet resources in your subject areas and teach them to the user community.
- Knowing how to identify important free Internet resources for possible addition to the BC Libraries online catalog.

### **10. Collection Assessments and Evaluations**

- Understanding the place of standards as guides and measurements in assessing collections.
- Understanding the various methodologies which can be applied in collection assessments and knowing which methodology should be applied in any particular situation.

### **11. Transferring/Weeding**

- Understanding the current space constraints in O'Neill Library and the remote storage options.
- Knowing what items or types of material are the best candidates for transfer or discard.
- Establishing and revising retention policies for serials and superseded editions.

### **12. Conservation/Preservation**

- Understanding the role collection evaluations play in the preservation of your collections.
- Understanding your role in making preservation decisions regarding the disposition of material due to deteriorating physical conditions, its retention, replacement, or changed format.
- Understanding the various preservation priorities for the library and how to incorporate preservation into the selection process.



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**\*CD MANUAL HOME**

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## Collection Development Manual *arts & sciences libraries*

### Subject Liaison Responsibilities | PDF version

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**Subject Liaison Responsibilities**

**Description:**

Faculty outreach is an essential part of the university library mission. As departmental liaisons, subject specialists are instrumental in seeing that the library's resources, services and policies continue to provide appropriate support for research and teaching at UB. The liaison role is an opportunity to help promote and develop the full spectrum of library resources, and goes well beyond the mere selection of resources. Subject specialists represent the library to the wider university; reciprocally and dynamically, they communicate faculty needs and concerns back to the library, and are thus important agents in the evolution of the library. The better a subject liaison understands his or her academic constituencies, the better and more rewarding liaison work will be.

The goals outlined below provide a potential structure to the working relationship between subject liaisons and the teaching/research faculty at UB. These goals are not meant to be linear; although goals two through five are preparatory and inward-looking in their emphasis on information gathering, obviously none of this can go very far without the creation and maintenance of active, personal contacts. Goal one, then, must come into play from the very beginning and throughout the process. The possible approaches listed below are meant to be suggestions rather than prescriptions, a continually growing menu from which individual librarians can choose the tools most appropriate to their own circumstances. Given the diverse institutional, historical, political and personal dynamics of departments, programs, and schools that the subject liaison is going to encounter, there is no single blueprint for success.

**Goals:**

Goal One: Establish and cultivate lines of communication between faculty and the library in order to promote the use of library resources and services as well as to learn about faculty and student

<http://libweb.lib.buffalo.edu/aslstaff/liaisonresponsibilities.pdf>

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### **Goals:**

Goal One: Establish and cultivate lines of communication between faculty and the library in order to promote the use of library resources and services as well as to learn about faculty and student information needs.

Goal Two: Understand the schools, departments, and programs relating to your subject throughout UB.

Goal Three: Understand the full range of curricular offerings relating to your subject.

Goal Four: Understand the research interests of faculty and graduate students relating to your subject.

Goal Five: Understand faculty and student use, expectations and perceptions of the library's resources and services.

Goal Six: Understand the library resources in your subject, collection policies, budgetary processes and limits, as well as other library policies and services relevant to your constituency.

### **Training:**

**Goal One:** Establish and cultivate lines of communication between faculty and the library in order to promote the use of library resources and services as well as to learn about faculty and student information needs.

Approaches:

Mechanisms for maintaining regular communication with users vary among librarians-- mechanisms include meeting with departments, chairs, individual faculty and students; email; memos; newsletters; library web publications and guides; university web publications and guides; university newspapers; student and faculty web portals (MyUB); and more.

Keep a list of faculty contacts and interests (faculty-contact database project).

The following suggestions are intended as examples only and are by no means comprehensive. They are in no particular order.

- Send letter introducing yourself as the library's subject specialist to individual faculty members
- Initiate meetings with department chair, liaison to library, secretary or administrative assistant, individual faculty members, graduate student representative or associations
- Offer to introduce yourself at a full faculty meeting
- Tour the department
- Have your name put on the department's mailing list
- Ask for a mailbox in the department
- Look at departmental bulletin board, newsletters, web pages etc.
- Ask that a link to library web guides be placed on appropriate departmental web pages
- Work with faculty to add library resources to course web pages
- Attend department-sponsored lectures, colloquia, performances etc.
- Attend departmental social functions
- Audit a course in the department
- Attend meetings of pertinent scholarly professional societies locally or nationally
- Ascertain the research and teaching needs of new faculty. Take a new faculty member to lunch. Set up a meeting in order to inform new faculty about library resources and services.
- Personally notify individual faculty of new resources, services or other matters of particular interest to them
- Demonstrate ways in which information-literacy activities can help support or achieve program/department goals or accreditation standards
- Write reports summarizing recent additions to the collection (including electronic resources) and outlining your plans for the period ahead
- Send memo at the beginning of each year giving overview of library resources and services pertinent to your subject
- Consult periodically with faculty to discuss major issues and developments of mutual concern to the department/school and the library (new electronic resources, expensive purchases, new subscriptions or cancellations, retrospective acquisitions, etc.)
- Visit each member of the faculty to discuss her/his research interests, professional activities and information needs
- Discuss the library's selection and acquisitions processes with faculty to help put their requests in perspective and to help define your collecting priorities
- Use the collection development policy statement as a focus for discussion and as a way to elicit faculty concerns and priorities for the collection
- Send new acquisitions lists to department
- Send information sheet about new resources to all faculty and graduate students
- Meet with new graduate students at orientation
- Seek out doctoral students, teaching assistants, and research assistants for specialized library instruction
- Work with faculty to develop information-literacy assignments and assignment sequences
- Work to establish an email distribution list which includes faculty members from several departments with an interest in your subject
- Share your best liaison practices with your colleagues
- Attend group discussions/workshops re issues, projects, techniques for effective liaison work
- Educate faculty about the variety of ways to access library resources
- Offer assistance in planning and coordinating student information-literacy assignments

<http://libweb.lib.buffalo.edu/aslstaff/liaisonresponsibilities.pdf>

- Keep in contact with graduate advisors and theses/dissertation directors in order to become aware of ongoing research
- Visit with deans and/or department chairs to discuss funding, program priorities, trends and plans
- Get to know departmental secretaries
- Monitor assignments: examine implications of assignments for use and promotion of library resources--maintain an assignments record
- Contact faculty to offer assistance with future assignments, and urge that assignments be sent to library instruction coordinator
- Examine course listings to determine courses in which library instruction seems particularly appropriate
- Offer assistance to department in showing the collection to faculty being interviewed for positions
- Make regular contributions to the departmental newsletter
- Put library-related items on the agenda for faculty meetings
- Offer to teach sessions for specific courses
- Offer orientations for new graduate students, research assistants, or teaching assistants
- Communicate your willingness to provide bibliographic assistance for individuals, particularly for graduate students working on theses and dissertations
- Create newsletters directed at specific user groups or research centers
- Work with the etc in teaching faculty the appropriate new technologies for their research and instructional needs
- Offer workshops to demonstrate the use of new electronic resources and services
- Offer to go to individual faculty offices in order to demonstrate the use of new electronic resources and services
- Attend student organization meetings
- Obtain lists of grant-funded projects in order to offer research support (grants which are not funded as well...)
- Promote upper-level and graduate bibliographic instruction, and develop new approaches to such instruction.

None of this precludes informal interactions with any member of the faculty--take advantage of serendipitous encounters!

**Goal Two:** Understand the schools, departments, and programs relating to your subject throughout UB.

Questions:

1. Which UB schools have departments or programs in your subject?
2. Who are the faculty? Their ranks? How long in department? Administrative responsibilities? Any endowed chairs? Visiting professors? Vacant positions?
3. Number of undergraduate majors and minors? Graduate students? Post-doctoral? Who are teaching assistants, research assistants or fellows? Their responsibilities?
4. Who is departmental secretary or administrative assistant?
5. Grants or other outside funding? Any affiliated research institutions? Publications under auspices of department? Departmental library? Other collections, special facilities or resources? Direct departmental or faculty involvement in gifts or purchases for the library?
6. History of your subject at UB? Present strengths and weakness of department? Its stature regionally and nationally? Professional awards to faculty? Past faculty or students of note? Further trends and prospects?
7. Formal faculty library committee or liaison within the department?

A Few Approaches:

1. Study UB catalogs and bulletins
2. Meet with department chair, administrative assistant or department secretary, department's library liaison

3. Consult VP Research pages, grants and awards registers, Directory of American Scholars, other resources pertinent to your subject
4. Check published guides to colleges and universities
5. Track publications and professional appointments of Ph.D. recipients

**Goal Three:** Understand the full range of curricular offerings relating to your subject.

Questions:

1. Degree programs and requirements?
2. Courses, seminars, colloquia?
3. Designated courses for undergraduate majors, graduate students, general students?
4. Interdisciplinary programs involving your subject?
5. Courses in your subject in other departments or schools?
6. New courses or programs being planned?
7. Present ones being phased out?

A Few Approaches:

1. Study course descriptions and schedules
2. Examine course web pages
3. Look at current and recent reserve lists
4. Look at syllabi and course reading lists
5. Visit bookstores to examine required and recommended texts

**Goal Four:** Understand the research interests of faculty and graduate students relating to your subject.

Questions:

1. Subjects of publications and conference papers by faculty?
2. Ongoing and planned projects?
3. Editors or members of editorial boards?
4. Members or officers in professional societies?
5. Topics of graduate seminars?
6. Topics of recent and in-progress dissertations?

A Few Approaches:

1. Obtain list of faculty publications from department, or compile one (check catalog to make sure our holdings are complete and up-to-date)
2. Meet with individual faculty to discuss their interests and work
3. Examine web pages of Office of Vice President for Research
4. Read campus publications
5. Consult catalogs and course descriptions
6. Survey recent UB dissertations in your field
7. Ask graduate advisors or the students themselves about current student research

**Goal Five:** Understand faculty and student use, expectations and perceptions of the library's resources and services.

(Note: please discuss these questions with Margie Wells and Austin Booth before approaching departments)

Questions:

1. Materials for courses or research normally on hand when needed? (If not: Not in collection? Checked out? Missing and unaccounted for?) Use other libraries? How often, for what kinds of materials?
2. Awareness and use of (and satisfaction with) access and policies? Reference, bibliographic instruction, interlibrary loan, other services? Special collections? Catalog? Web? Other?

<http://libweb.lib.buffalo.edu/aslstaff/liaisonresponsibilities.pdf>

3. Any special requirements or unmet needs?
4. General degree of satisfaction with resources and with library overall? Satisfaction increasing or decreasing over time?

A Few Approaches:

1. Review library's BI statistics
2. Review circulation and interlibrary loan statistics
3. Talk with other librarians or with administrators knowledgeable about the history of your faculty's involvement with the library
4. Send out questionnaire or discuss with faculty in person

**Goal Six:** Understand the library resources in your subject, collection policies, budgetary processes and limits, as well as other library policies and services relevant to your constituency.

A Few Approaches:

1. Thoroughly familiarize yourself with the library's collection development policy statement for your subject
2. Thoroughly familiarize yourself with the library's electronic resources and web guides relevant to your subject
3. Look at the RLG conspectus report for your subject
4. Obtain or compile a list of journal subscriptions and series standing orders in your subject
5. Begin to take you own measure of the collection by checking the standard bibliographies, or other assessment techniques
6. Discuss the collection development policy, the budget process, and other collection-related issues with director of collection and research services
7. Become conversant in the specialized reference and instructional resources offered by the library in your subject
8. Meet with librarians in other departments to learn about the range of policies and procedures in public and technical services that affect the library resources and services in your subject

## METHODS OF LIBRARY OUTREACH & LIAISON

Prepared by:  
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March 28, 2002

### **Key Players: Partners & Constituents**

1. Tenure-track faculty
2. Lecturers & Adjuncts
3. Visiting Faculty - short & long term
4. Emeriti
5. Post-Docs
6. Graduate Students
  - Teaching Assistants
7. Undergraduate Students
  - transfer students
  - upper division vs lower division
  - returning students
8. Academic Unit Support Staff - have annual meeting with pc for demo
  - Academic personnel director - challenge is to maintain current lists & demographics of unit
  - Development director or contact
  - receptionists
  - secretarial staff
  - business office
  - counseling office - for Grad & UG advisors & staff
  - systems support
  - peer counseling
  - mail room - get on distribution list for all info from school
9. Relevant Library Colleagues

### **Public Relations Calendar**

1. Academic Year drives contacts
  - 3 quarters plus 3 summer session terms for courses
  - recruitment cycle for new faculty - most active between Nov-March
  - arrival for new faculty - most active between July-Sept but all year
2. Federal Grant Applications - Feb 1, April 15, May 1, July 1, Oct 1, Dec 1
3. Orientation/Welcome
4. Instruction
5. Research
6. Ongoing Issues & Interests

**Communication Methods - always need current info**



1. for faculty - be able to send messages on School/Dept Faculty listservs - can't receive - must add/create additional list for lecturers; mail copies to those who don't read eMail - send major messages in Week 9 for next quarter reminders; and updates of my schedule; relevant activities
2. Dean or Director - at least one annual meeting
3. Department Chairs - at least one annual meeting; frequent communication by eMail when needed
4. Library Committee - if there is one - I convene at least 2x/ yr - most communication done via eMail
5. for graduate students - listservs; via Coordinators
6. for undergraduates - posters; via Coordinators
  - UG Mentors
  - UG Residential Houses
  - Professional Society Student Chapter - ie) ERDA, APA, IEEE, ACM
7. bulletin boards - for new materials & promotion of new services - try to change quarterly
8. add contact information to all School/unit publications - for Liaison Librarian

**Activities & Topics Covered**

1. most intense about library services: ie) Reserve, Classes, reference activities and research consultations, programs, collection shifts, DDS/ILL & CDL MELVYL Request, A&I resources, eJournals, EndNote support, ILC/MRC services, library hours, how to search ANTPAC & MELVYL & transitions, GID materials and organization, GIS
2. update about new materials
3. making recommendations for materials
4. specialized resources
5. introduction to relevant consortia - ie) CRL
6. introduction to GID - major area of interest to my units

**Preparation for Faculty Interview**

1. Obtain CV from Faculty or AA
2. Look for personal website if available
3. Review list of publications and research interests & what research group they will be a part of - who will be their closest colleagues? - maybe run a Citation search and JCR search - demonstrating good data results
4. Learn what courses they may teach - what levels
5. Determine whether it is best to meet in their office or at Library
6. Make sure that they are registered, authenticated, have ID - know what system/browser they use, what software, etc
7. Develop Information Packet - collect appropriate brochures and make copies of relevant library homepage content
8. Check out that recent books are on bookstore "Faculty Publication" shelf
9. Leave business card
10. Begin outline of interview form



11. Begin list of follow-up action items - what was promised, what information do they need?

**Requests made of Faculty**

1. Course syllabi
2. Preparation for new courses
3. Selection of new textbooks and readers; use of coursepacks
4. Awareness of copyright practices
5. Research directions & changes
6. Update on relevant professional activities, ie) conference attendance, grant writing, leadership roles, society memberships
7. Ways that I can support their work - partnerships, collaboration

**Examples of nontraditional liaison activity that has been rewarding and fun**

1. Program support - conference work - preparing of bibliographies, running of book fairs, sales; bookstore readings & promotions
2. Course content integration
3. Utilizing media in the classroom
4. Support for research lab staff
5. Introduction to other faculty working in same areas - promote interdisciplinarity
6. Information sharing about grants, conferences, local news, exhibitions, etc
7. Work with faculty & community users to evaluate gifts/exchange resources
- 8.

**Ongoing Homework I engage in to support liaison activities:**

1. Attend departmental, school events, especially lectures, forums, programs, etc
2. Perhaps audit classes or lectures
3. Visit local bookstores often
4. Communicate new resources that arrive that may be of interest - in all formats
5. Read publishers catalogs - even when not in buying mode
6. Determine what professional societies are most important - learn about publishing output so that I can convince faculty about advocacy on various issues
7. Read relevant conference literature; spend time in CPR and actively browse online
8. Attend relevant professional conferences that are in local area from San Diego to LA - OC attracts a lot - many have worthwhile trade shows; sometimes justifies trip to San Francisco - puts yourself in role of the academic
9. Show up at social events when invited
10. Send congratulatory messages to faculty when they are recognized - always present service oriented attitude
11. Be prepared to take down book requests & check out info whenever it is relayed - at sporting events, social encounters, grocery store, movie lines, etc
12. Copy LT on all relevant information - ask before you promise; keep Lib Admin in the information loop so things don't come back to haunt you.

9/27/06

**BEST PRACTICES IN FACULTY/ DEPARTMENTS OUTREACH AND LIAISON ACTIVITIES [Best practice=things that we observed that work well]\*\***

**Sheila Smyth  
Pauline Manaka**

It is part of the subject research librarian's responsibilities at UCI to cultivate good relationships with faculty, students, the academic departments, and staff who are impacted by the services of collection development, reference and library instruction. The process to cultivate these relations takes time and is unique according to each constituency. However, research librarians are expected to meet certain basic practices regardless of discipline and department. The following are some examples of core activities, according to librarian function:

**A. Instruction**

Reach out to new faculty, graduate students and teaching assistant especially at the beginning of each school year; introduce library instruction and information literacy. Remember that newer professors are more amenable to having their classes participate in Library Instruction sessions.

Offer Library Orientation sessions for new graduate students in your departments. Teach a library session to new Teaching Assistants. Provide your departments and school an opportunity for you to teach library sessions in as many courses with Teaching Assistants as possible.

Bring your business cards to BI sessions. Students are more likely to ask for your help in the future if they can easily find your contact information.

If possible, get involved in the Research Methods courses in your subject areas and create BI sessions for them. If departments put a class online try to have the library involved in the course, if possible.

Offer office hours after BI sessions for research intensive classes. This will save the whole class from ending up at the reference desk with the same questions.

When teaching upper division classes, teach students both how to find information, and how to think critically, like a researcher in that particular field.

Be prepared to create library exercises whenever professors request them.

Create evaluation forms as a way to help you improve your teaching skills.

Remember to emphasize the unique features of databases like Web of Science - citation mapping- to help users figure out what are the seminal articles.

Remember that you can make the BI sessions learnable moments for professors by having a quick demonstration of something useful that the teachers are not likely to know.

**B. Teaching Statistical Data**

Spend more time learning the sources for statistics/data in your subject areas. Add a section on statistics in your BIs because of the importance of quantitative literacy skills at UCI.. Remember that showing students basic statistical sources such as Census Data, Statistical Abstracts, or other major government statistical publications is very effective because of the interdisciplinary nature of these resources.

**C. Effective Liaison Endeavors**

Seek invitations and attend all orientation functions in the departments you serve, including lecture series, to make yourself known to everyone.

Make sure to set up meetings with new hires and visiting scholars at the beginning of the year or as needed.

Target professors who are library-shy by informing them of something unique to their need, such as eScholarship Repository, “Alerts functions” of the CSA databases, etc. in order to have an effective impact on them.

Keep up to date with departmental website changes in your areas to better inform yourself and the Library.

Always be ready to talk with your faculty and students no matter where you meet them e.g. café or shops. Be ready to write down requests.

If you have time audit a course or sit in on a session or two for a class in your department(s) on a topic that you are not familiar with. The faculty will like this, it makes you more visible, and it’s useful for collection development.

Update faculty on new developments, information resources, etc. that the Library acquires.

Join relevant disciplinary associations, such as the American Sociological Association, attend conferences and, when possible, actively participate in committees.

#### **D. Reference/Instruction**

Always introduce students from the BI sessions to Reference, electronic and in person. Advances in technology lead many students to think using library resources is really simple, when it is actually becoming more complex.

When doing the reference interview, try to emphasize use of critical thinking skills to students.

Show students in reference transactions and BIs how to assess the quality of articles to determine authority, accuracy, currency, and objectivity.

Listen carefully in order to help students focus on critical thinking skills, such as the research method or the theoretical approach, and what they are required to do for their research project.

Collaborate with other colleagues for information that is unique to their areas. The UCI campus is very interdisciplinary and requires librarians to learn more about other areas and acquire knowledge of core resources and databases in numerous subjects such as . business, statistics, government information, film, religion, and wome'sn studies.

#### **E. Collection Development**

**See details/specifics in the “Baseline Standards...” & the “Methods of Library Outreach ...” documents**



## SSH Cluster Collection Development Toolkit

- ☰ Introduction
- ☰ Duties and Responsibilities
- ☰ Tips for Developing Subject Expertise
- ☒ Collection Development Practices and Procedures
- ☰ Collection Groups: Organization and Structure
- ☰ UC-Wide Collection Development Resources
- ☒ Formats
- ☒ Funds
- ☰ Approval Plans and Vendors
- ☰ Gobi2
- ☰ Approval Room
- ☒ Cataloging
- ☒ Off-Site Storage

Download the entire toolkit

Search the Toolkit.

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### Collection Manager's Duties and Responsibilities

Collection Managers are responsible for all aspects of collection management and development for their assigned subject area, including selection of information resources; storage, preservation, and retention decisions; liaison activity with faculty and departments; specialized instruction and consultation; ongoing collection evaluation; and budget responsibility.

The following bullets describe various competencies that should be developed over time and which may vary depending on the subject area.

#### Selection of Information Resources

- Know the subject area and be aware of current trends within the discipline.
- Develop a working list of selection tools.
- Select materials in a variety of formats.
- Review incoming materials in the Approval Room to see new titles and to flag materials for special locations such as "Reference" or for faculty notification.
- Review the approval plan profile for each of your subject areas.
- Identify and fill in gaps in the collections.
- Identify emerging areas of interest, based on publishing patterns, and UCSD faculty research and instructional activity.
- Collaborate with other librarians to develop collections in areas of overlap.
- Review gifts for possible addition to the collection.
- Solicit gifts to enhance particular subject areas.
- Identify book dealers and publishers specializing in the subject.
- Encourage suggestions for additions to the collection



<http://sshl.ucsd.edu/sshbib/toolkit/duties.html>

from library users.

- Identify and enter online resources into Sage.
- Identify online resources that should be sent to the Metadata Services Department for cataloging.

### **Collection Management: Storage, Preservation and Retention**

- Consult with appropriate staff concerning receipt, cataloging, and binding.
- Identify needed additional copies, replacement copies, or new editions.
- Identify materials needing preservation.
- Identify low-use materials for transfer to SRLF or for withdrawal.

### **Faculty Liaison Activities**

- Establish and maintain open communication with departmental representatives.
- Inform yourself of the department's plans, recruitment of new faculty, and introduction of new courses.
- Offer to meet with potential new faculty during the library portion of their interview day. Take this opportunity to suggest they ask for new faculty start-up funds to enhance the library's collection in their areas of interest.
- Become familiar with the research and instructional activities of the faculty.
- Meet with new faculty members to offer a specialized overview of the library's resources and services
- Remain informed about the composition of the department, including the number of full-time faculty, lecturers, majors, teaching and research assistants, and graduate students.
- Offer to attend faculty department meetings to update them on library issues.
- Inform the department about library resources and services
- Maintain current "new items lists" in Roger, as appropriate
- Discuss expensive items with faculty to gauge interest and potential use before purchasing.
- Offer to provide library instruction for classes that have a research component.

- Provide research consultation for faculty and students, as needed.

### **Collection Evaluation**

- Know the collection strengths and areas of distinction within your subject areas.
- Conduct an evaluation of discrete parts of your subject areas every year
- Undertake major assessments of significant portions of your subject areas every 3-5 years
- Conduct use studies

### **Budgetary Management**

- Manage your funds for assigned areas
- Know the current trends in discipline related costs for different types of materials
- Know the current trends in exchange rates and other costs associated with acquiring materials
- Predict the impact of costs on funding requirements
- Develop written justifications for special purchase proposals
- Establish and apply priorities for spending allocated funds
- Monitor spending and adjust spending patterns, as needed

### **Resource Sharing**

- Know existing UC resource sharing agreements and their effect on selection decisions at UCSD
- Consider potential resource sharing agreements and their effect on UCSD's collection development activities
- Coordinate acquisitions with other library collections and UC Libraries
- Coordinate acquisitions with national and international consortia such as the CRL Global Resources Program
- Recommend materials for UC-wide acquisition
- Volunteer to serve as a Database Monitor for UCSD electronic resources.
- Volunteer to serve as a Resource Liaison for CDL resources.
- Identify other resource sharing possibilities to discuss with other Collection Managers

## Chapter 5

### Liaison

Liaison is our term for bibliographers' development and maintenance of relationships with faculty. Effective liaison work is critical to the success of the MSU Libraries' mission; it is also central to the effectiveness of any bibliographer. Knowing the user community's needs for and use of information in any format assists a bibliographer in making good, useful selections. This knowledge is also helpful in weeding, serial cancellations, removals to remote storage, preservation, and other collection related matters. The goal is mutual and timely information exchange between the academic units and/or faculty members and the librarian/Libraries so that our collections in all formats meet patrons' needs as well as we are able to afford to do.

This chapter addresses both the art and the science of liaison, that is, tips about the manner of conducting liaison relationships, and the activities, which might be done to institute, improve, and maintain relationships with any given MSU patron group. That said, 'what to do' and 'how to do it' vary depending upon the personalities and characters of both the librarian and the patron group, the particular academic environment and its politics, the subject, discipline or area, the size of the patron group, the amounts and kinds of library information and materials needed, and the amount of time available for this job function. In some situations the Library assigns a librarian as a formal liaison to a unit, center, department, or college. University units may appoint a specific faculty member to interface with the Library or appoint a library committee. Aside from these assignments, in our library system bibliographers have a free hand in developing and maintaining their liaison relationships. We do what works for us and for the patrons.

### The Science of Liaison, or, What to Do

Get to know the faculty, graduate students, research associates, post-docs, and secretaries in your collection area(s) on an individual level as much as possible. At the end of this chapter there is a series of interview questions useful for learning their library needs for teaching and research, and for the library needs of their undergraduate students. It is wise to take notes and type them up afterwards as an aid in remembering people's interests and needs.

Learn about your patrons by studying their entries in

- Community of Science database (COS) at <http://expertise.cos.com/cgi-bin/exp.cgi>
- MAGIC <http://magic.msu.edu/>
- Dissertation Abstracts <http://www.lib.umi.com/dissertations/gateway>
- OCLC WorldCat
- Periodical indexes in their fields
- MSU's home page, *e.g.* under "Academics" <http://www.msu.edu/academics/index.html>, in the course schedule book, descriptions of courses, and via their unit, their individual web sites

Request to introduce yourself and your purpose in formal unit meetings, if permitted to do so. Mentors, supervisors, and liaison predecessors may introduce you to department chairs and individual faculty members.

Ask to be placed on the unit's print and/or e-mail mailing list to receive information about seminars and department news.



Maintain this knowledge and keep up to date with changing individual research and teaching interests by meeting people for coffee or lunch, examining web pages, following the courses they teach in the course schedule book, looking at the materials used in classes and placed on reserve, attending seminars in the units, attending formal meetings (if allowed to), examining their publications, listening to local radio, reading the *MSU News Bulletin* (<http://newsbulletin.msu.edu/>), *State News* (<http://statenews.com/>), *The Research News* (<http://www.msu.edu/unit/vprgs/newsfeatures.htm>), the newsletter of the VP for Research and Graduate Studies, and participating in the social life of the unit, if possible. Just keep your ears and eyes open to new developments and rearrangements

Learn and keep up-to-date your knowledge of the programs, courses, units, departments, and colleges whose members use the materials you collect. Your collection policy and collecting priorities need to reflect changes as they occur. Keep abreast of the numbers enrolled or researching in the area. Utilize components of MSU's web site.

Be an advocate for library materials and services for your patron group. Remember, originally, it was the faculty that performed the campus library's collection development. They delegated the responsibility to us. We work for them in this function. Try not to be wimpy within the library, assuming that the answer will be no to some expensive monograph, set, database, etc. Be willing to hear 'no' time and again on behalf of your patrons.

Maintain regular contact with your patrons, keeping them informed of new print and electronic resources, library services and policies, and changes in the Libraries by speaking at meetings, meeting annually with department chairs, sending out print or e-mail newsletters, creating exhibits, providing library instruction and tours, utilizing space in department, unit, center, or college newsletters or listservs, arranging to offer regular office hours in the department, walking the halls and speaking with people informally in the unit, meeting people for lunch or coffee, obtaining names of new faculty and graduate students from secretaries, or whatever works for you and for them.

If you choose to use your own private e-mail list:

- Work at keeping the mailing list up to date.
- Be brief and concise.
- Use short paragraphs, one topic per paragraph.
- Do not use it too often.
- Rewrite, rewrite for clarity. Consider sending a draft to yourself, letting it sit a day or so, and revising before sending.
- Be sure URLs work before sending them.
- Do not merely forward internal library or vendors' messages; rewrite them for your audience's comprehension and to make them more concise.
- See the Library from the users' perspective; convey information that users appreciate, which is pertinent to them (spatial rearrangements, new copiers, as well as collections information).
- If your private e-list is long, put the name of the group on the bcc: line, so people do not have to scroll through the list of members' names. Send the messages to yourself.
- Offer specialized reference appointments.
- Offer library instruction. Offer to help plan and refine library assignments.
- Let patrons know about online databases, e-journals, primary resources online, useful free web sites, e-books. Offer point-of-use-instruction in person.
- Let patrons know about purchase of expensive resources.

- Solicit input for expensive purchases as well as for monographs not expected on approval.
- Explain the approval system.
- Solicit input for serial cancellation decisions.

Take advantage of serendipitous encounters with patrons in the library, at lunch, and elsewhere. Hear reference questions, within and behind conversations, that do not present themselves this way initially.

Offer electronically generated and distributed new book/new resource lists in your collection area. If you do not do new book lists, when you see new books on the approval or new acquisitions shelves that would be interesting to particular individuals, let them know by e-mail.

Inform your constituency about expensive purchases acquired in any format.

Work with faculty when collection policy statements are revised because of changed collection depths or foci, or because of reduced or increased funds. Keep them apprised of changes.

When patrons bring access or cataloging issues in your collection areas to your attention, work with Technical Services and Systems to improve the situation.

Offer to assist with accreditation reviews by preparing or helping to prepare the grist about the Library or providing tours of the library for the accreditation team.

Offer to assist with learning or use of new online resources. Refer problems with access (*i.e.* the proxy server) to Distance Learning Services. Encourage patrons to let you know about progress and resolutions.

Offer a tour of the Libraries and hands-on introduction to online resources for new faculty and graduate students in your collection area.

Offer to assist with grant applications by providing the basic information required about the Library and its collections.

Survey your constituents to learn about their library usage and information needs.

Develop useful research guides and other web resources to help various levels of your constituency use the library more effectively.

If a unit or department has a library committee, meet with this body regularly.

Keep abreast of intellectual trends in your collection area by having the major scholarly journals routed to you or by reading/scanning them online. Attend scholarly conferences in the subject, discipline, or area either for continuing education for yourself or to present papers on new library resources, or both. Join appropriate scholarly organizations; you will receive your own copies of the journal and newsletter.

Offer library instruction. Offer to assist faculty in developing assignments utilizing library resources. Provide feedback to the faculty member on how the assignment goes and possible ways to improve it.

If you have the academic credentials and the faculty will permit it, teach credit courses at the undergraduate or graduate levels on research methods in the field.

Offer LCTTP courses on aspects of your collections and research methods for the MSU community. Instruction, well done, gives you visibility. People will recommend you to their colleagues and friends.

Offer a course on collections and research methods in your collection area in the MSU Evening College or East Lansing Recreation and Arts programs, geared for the general public.

Find out if there are *ad hoc* discussion groups in the unit or on campus that meet to read and discuss books, present their scholarship in progress to each other, or study issues in your collection area. If the members will allow you, join them for a meeting, or even as often as you can. Doing so can help you learn the field and bring you in contact with faculty and/or graduate students.

Become well enough known in the unit to be invited to social functions. Go to them. If you are invited and are unable to attend be sure to explain why something else is more important at that time.

Develop your own scholarly life in some aspect(s) of your collection area, by researching/reading, writing, and publishing in print or online bibliographies, reference works, web sites, or research guides.

Pursue further formal education here at MSU in your collection area, or arrange to sit in on, or officially take, or retake, certain pertinent courses. This increases your knowledge of the field and the faculty. There is nothing more respected by academicians than pursuit of the knowledge of their field.

Offer to collaborate on grant funded research projects with faculty or graduate students.

Subscribe to one or more scholarly electronic discussion lists in your collection area, or at minimum, the electronic discussion list for the librarians in your collection area, by consulting, for instance, the Directory of Scholarly Electronic Journals and Academic Discussion Lists (<http://db.arl.org/dsej/index.html>). Watch these lists for developments in the online world and publication (either print or electronic) of resources outside our approval system. Notice the directions scholarship in the field is taking by monitoring the discussions. Here is a source of expert help with hard reference questions.

Be sure to congratulate faculty on their new publications, as you learn about them. Encourage them to participate in the Faculty New Books Reception. Deliver the memento to them personally if they are not able to attend the event.

Keep records of your liaison activities as required by your Library unit. Keep your files on individual faculty members' research and teaching expertise up to date. Keep other records of your activities with which to assist yourself in helping the same person again on a different topic, or a different person on the same or similar topic. Keep copies of paper or electronic newsletters you send; sometimes people mislay the information and ask you to re-send.

### **The Art of Liaison, or, Tips on the Manner of Doing It**

Having good listening skills is important in liaison work. Whatever medium a communication exchange takes place in, listening requires commitment and involvement. It is active, not passive, although it may look passive. One has to want to listen and hear people's needs; there are no short cuts. Take your time. Be patient. Ask your questions slowly; be prepared to listen to what an individual has on his/her mind without at the same time planning in your head how you would like to, or intend to, respond. People can think four times faster than they talk. Do not be unnerved about periods of silence in conversation. Some people need time to think before responding. Give the person that time. Give yourself that time, too.

Listen for the patron to express the situation/problem, its symptoms, source(s), his/her needs, and his/her preferred solution(s). Ask for clarification on these points, if needed. To do this ask questions that begin 'What', 'Where', 'When', 'Why', 'Who', or 'How.'

Face the patron directly and maintain eye contact.

Let go of the outcome. Consciously try to set aside your own judgments and evaluations of the person and his/her problem or issue as you listen. At the very least, be aware of your own beliefs, biases, filters, and frames of reference. In addition, try not to let past encounters with the patron and/or past problems color new requests. The past, or a person's appearance, behavior, dress, and way of speaking can be off-putting, but we should try not to let these things bias us.

Accept that the patron is always right within his/her perceptual world.

Listening with empathy involves placing yourself in the other person's situation without losing yourself in the process. Patrons can be irritated to enraged about any manner of library issues. Just listen. If you come from a family background in which people did not display their displeasure verbally, experiencing it can be quite unnerving. Remember that expression of feelings is actually healthy; it gets the feelings out of the individual. And, you learn where you stand from the faculty member's point of view. Refrain from saying "I know how you feel," because no one can ever know exactly how another person feels. You may think you do know, you may indeed know, but to tell the other person this is presumptuous.

It is important to pay attention to and to read both the verbal and the non-verbal messages. To be sure you have understood correctly, it is wise to reflect back, repeating what you have heard and asking, "Is this what you mean...?", "Do I understand X correctly...?", "Please elaborate on...", "Please say more about...", or "You're saying..." repeating what you have heard. This gives the faculty member an opportunity to clarify his/her verbal message and reduces the possibility for misunderstandings.

Listen for everything, beyond the words, in a faculty member's conversation. Take in the feelings the person expresses. Listen for his/her thoughts, ideas, attitudes, opinions, prejudices, and perceptions. Listen for patterns, recurring themes, contradictions, consistencies, and inconsistencies. When we do this accurately we are more certain to really 'get' the depth of feelings, prejudices and so forth. If you are not sure you are reading these aspects right, try to ask a question to find out how deeply she/he holds her/his feelings, ideas, opinions, etc.

What does the faculty member's body language and posture say as you engage in conversation? Notice voice tremors or modulations, breathing, gestures, sighs, facial color, muscle tension, and posture. Some individuals may speak more loudly with body language or gestures than with words. If you are not sure you are reading the non-verbal component accurately and/or it does not seem consistent with the words, try to ask a question to find out whether the body language is consistent with the words and feelings.

Listen also for what the person does not say, does not address. This, too, helps fill out one's picture of the individual and his/her problem with, or impression of, the Library.

When interviewing faculty members about their library needs for teaching and research 90% of the conversation should be this person talking. Only 10% of the conversation should be the librarian talking. Telling faculty about our services is important, but listen to their needs first.

Remember that you seldom have to solve a patron's problem on the spot or commit yourself to a particular course of action. Buy time if you need it. Do not make things black and white. Be able to see



and deal in gray. Help the faculty member to do this also.

If you can not say 'yes' to a faculty member say "I'll ask my boss" and then go and discuss the matter with your supervisor. Supervisors who cannot say 'yes' to their staff members with problem situations should discuss the matter with their own supervisors. If need be, solving a problem may have to go all the way up the line to the Director. Weighty, divisive issues such as retention of print serial subscriptions in the electronic era may end up being decided at the highest level. Keep the faculty member informed of progress on their issue.

If you do seek commitment from the patron, ask questions which require a 'yes' or 'no' answer.

Remember that faculty may say or demand a particular end (what they want), but this may not always be what they need (from our perspective). We may know of resources or ways to resolve, or help resolve, a faculty member's problem that is more appropriate than what they say they want. If/when a faculty member is rude or rants excessively, inform your supervisor. Fear, anxiety, insecurity, and mistrust can cause patrons to be rude, cold, hard, critical, judgmental, and difficult to work with.

Keep relationships with the patrons in your collection areas on a professional level because we do have to say 'no' to some requests. The hardest people to say 'no' to in one's life are people we feel sorry for and people we care a lot for.

Minimize use of library jargon to prevent misunderstandings.

Try to prevent distractions when interviewing or meeting with faculty. It is good to meet with faculty members in their offices initially. On their own turf, faculty may be more expansive verbally, plus this gives us an opportunity to view their book collections, or some of it, as well as their computer set-ups. Later on in the relationship, when dealing with problems or issues, it is wiser to meet on your own turf, or in a more neutral spot for both parties, such as the Cyber Café. In any case, privacy is important.

Remember that unless the patron is new to campus, his/her relationship with MSU Libraries seldom begins with you. It has been shaped by the manner and activities of your predecessor, by the patron's relationships with librarians and libraries at previous institutions, and possibly also by friends and relatives who work in libraries. For instance, patrons with librarians for spouses, friends, or relatives may have higher expectations of us because they know more about what librarians can do. Someone may have had a particularly good, or particularly difficult relationship with the library/librarian at a previous institution or right here at MSU in the past.

Remember that patrons' attitudes towards us are affected by their respect for us, and their estimation of our abilities. If you suspect, or know, that a patron does not respect you it is uphill work to gain, or to regain, this respect. Becoming more knowledgeable about your collection area helps, as does being genuinely concerned about their needs, and showing genuine concern about their perceptual world. Actively practice the communication tips in this chapter. Work on your outreach efforts. Discuss the problem with your supervisor. Encourage disgruntled patrons to speak with your supervisor. A patron may tell a supervisor things they are not able to confront you about.

Always do a superb job in all you do for patrons, answering reference questions, following through with purchase requests, and providing instruction for classes, because one's reputation gets around in a community the size of ours. To be an effective liaison one must be trusted and respected both personally and intellectually. We earn the patrons' trust by our work for them. Be as confident, calm, open, welcoming, and secure appearing as you can manage. This is not easy when one is young, new on the job, introverted, and/or not well educated in one's collection area, subject, or discipline. If one gives off

an aura of capability and approachability, the clients will be more likely to seek you out with their library needs and questions.

**LIAISON WITH FACULTY: INTERVIEW QUESTIONS**

Before the interview it is wise to find information about the faculty member and his/her works by exploring the sources mentioned in the Liaison chapter of the Bibliographer's Manual.

1. What are the faculty member's name, degrees, school, and present academic rank?
2. What languages does the person read? Write? Speak?
3. What courses does the person teach? Will he/she share syllabi?
4. What are the person's current research interests? Previous areas of expertise? Topics of interest? Authors of interest?
5. Is or has the person's research been funded by grants? From whom/where? What is/are/were the projects? Employ student assistants? How many?
6. Does the person have graduate students? How many? What are their names? What academic level are they? What are their research/thesis/dissertation topics?
7. Does the individual read voraciously in his/her own, or any other field? Favorite authors?
8. What are the five scholarly journals most important for his/her research? Teaching? Does the person subscribe or rely on the Libraries' copies? Read them in paper or online?
9. How does the individual use e-mail? A lot? A little? Subscribe to and/or moderate any scholarly e-lists? Which one(s)? Are there e-lists the person regards as ineffective?
10. Glance at the office computer set up. Ask what the person uses his/her computer for. Does the person have/use another computer at home?
11. Does the person use full-texts online? What are they? For teaching? For research? Both? Does the person create online texts? For what purpose? Are they available to others?
12. Does the individual create web sites? For classes? For an organization?
13. Does the faculty member use ANGEL or other course software?
14. Does the faculty member use the Libraries' collections for primary source material? For teaching? For research? Do we own or offer access to what is needed? What about use of print sets, microforms, online resources, Special Collections, other resources?
15. Does the faculty member use the Libraries' web page and its offerings? If not, offer to show the person how.
16. What are the most important trade, university, and association publishers for his/her work?
17. Is the individual on the editorial board of any scholarly journal? Which? Is the publication print, electronic, or both? What is the person's role on the board?
18. Does the person run a blog? Named? For?

19. What professional organizations is this individual a member of? Officer? What conferences does he or she typically present papers at?
20. What directions are the person's own teaching and research taking at this time? What about the field or discipline? What about the directions of his/her unit at this time? What projects does the person envision for the future? New courses planned? New courses being developed or offered by others in his/her unit?
21. What is the faculty member's current relationship with the Libraries? In the past? What librarians has he/she worked with?
22. What is the person's current impression of the Libraries' collections in his/her area(s)? Strengths? Weaknesses? Would he/she like to suggest any works to be added today?
23. Does the individual's campus unit have an appointed person to communicate unit concerns with the Libraries? Who is it? Is there a Library Advisory Committee? Who are the members? Has the person approached the committee with concerns about the Library in the past? With what result?
24. How could we meet this faculty member's library needs better?
25. For faculty with graduate students, is/are there special reading lists for these students? Does the person use it/them? Will the person share copies?
26. Does the person require any library use, work, or assignment in his/her undergraduate classes currently? In the past? How did/does it go? What is the assignment? Short paper(s)? Term paper(s)? Book review(s)? Group projects? Other? Describe. Will the person share copies of the assignments?
27. Is there anything else this individual would like me to do immediately for him/her with regard to the Libraries?
28. What is/are the best way(s) for me to keep up with this person's activities? The unit's activities?
29. How would this person like to be kept up to date about the Libraries' collections and services?

Thank the faculty member for his/her time.

Explain the Libraries' collections and services in this person's area if you have not already done so.

Offer to put the person on your private e-list or to do for him/her whatever service(s) you offer others.


Reiterate what you will work on when you return to the Library. Follow up.

Size up the person's book collection.

Leave your business card. Encourage the faculty member to contact you when he/she needs your help.

Several days later, write the individual a thank-you note.





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**AskUsNow!**

This Selection Manual is an indepth overview of selection at the University of Tennessee, Knoxville Libraries. Some of the material in this manual may be duplicated in the Selection Manual for New Subject Librarians and the Library Representatives Manual; however, there is other vital information contained within, and it should be used in conjunction with these manuals and fact sheets as sources of information to assist in the selection process.

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## Research Services Division

# Bibliographer Manual

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## VII. Appendix, *continued*

### Orientation Checklist

#### 1. *Research Services Division*

Lindsey Schell, Jo Anne Newyear, Merry Burlingham

- <http://staff.lib.utexas.edu/divisions/cird/>
- Collection Stewardship and Assessment Groups (CSA) and related projects
- Information Resources Budget
- Distribution of material by CIRD staff: sample serials, purchase requests; serial reports/projects, Faculty Newsletter
- Bibliographer Annual Report (by department/fund); Annual Report (Personnel); Bibliographer subject pages for UTLOL
- CIRD/RS Staff Web: Collection Development Policies, tools for bibliographic verification, forms, lost/missing reports, ILL reports, Fund Activity Reports (FAR), Blackwell quarterly reports, collection development issues: <http://staff.lib.utexas.edu/divisions/cird/>
- UT Web: Colleges and Departments - identify faculty research interests, courses offered, special departmental programs/units, departmental publications, links to other Web sites <http://www.utexas.edu/depts/>
- Departmental liaison activity: meet official liaison and key faculty, head of graduate student groups, departmental e-mail lists, notification of lectures/symposia
- Library Catalog, <http://utdirect.utexas.edu/lib/utnetcat/>
- Blackboard and Sharepoint

#### 2. *Monographic Acquisitions*

Anita Farber

- Overview of Acquisitions on Division web pages: <http://staff.lib.utexas.edu/divisions/tsod/acquisitions.html>
- European language approval/selection plans (Aux Amateurs, Casalini, Harrassowitz, Touzot), Blanket order plan for UT/A&M Presses
- Endowments
- In Process Control (INPC)-Acquisitions and Binding
- NetLibrary

#### 3. *Approval/Selection Plans (2 hours)*

Glen Worley

- BNA Collection Manager: <http://cm.blackwell.com/>
- Set up personal logon, initial exploration of sub-profiles to be managed, using CM to identify exclusions and set-up of e-notes
- Using CM for ordering
- Weekly review process: sign slips, identify processing priorities (flags), URL flags, added copy routines, PCL New Books
- Desktop Innopac and auto-login set up

#### 4. *Firm Orders*

Carol Lockett

- Collection Manager orders
- OCLC WorldCat e-mailed orders to [neworder@lib.utexas.edu](mailto:neworder@lib.utexas.edu)
- INNOPAC: Placing provisional orders; <telnet://innopac.lib.utexas.edu>; using to track monograph orders and receipts; rush and priority designations on orders; online orders using credit card; administrative reports
- Acquisitions web order form: [http://staff.lib.utexas.edu/divisions/tsod/new\\_order\\_form.html](http://staff.lib.utexas.edu/divisions/tsod/new_order_form.html)
- Using vendor exclusion slips for orders
- Vendor selection and state contracts: When exceptions are permitted
- Out of print orders - both CIRD and Online Books pages include links

#### 5. *Serials Acquisitions/PCL Periodicals*

VII. Appendix

- [Contacts within the Libraries](#)
- [Policies](#)
- [Orientation Checklist](#)

Jill Emery, Kim Wallace, Janina Hurtado; Jo Anne Newyear-Ramirez

- INNOPAC serial records: Check-in and claiming routines; procedures for new titles/cancellations/cessations/lapsed; fund transfers; Distribution of professional journals; CIRD Serials info: <http://staff.lib.utexas.edu/divisions/cird/Credits/credit.html>
- Serial, Monographic E-Resource Action Request form (SMEAR): <http://staff.lib.utexas.edu/divisions/cird/Credits/serialorder.html>
- Serials Acquisitions web page: <http://staff.lib.utexas.edu/divisions/tsod/serials.html>
- INNOPAC ID/password
- Periodicals Room

6. *Electronic Resources/Consortia*

Ronda Rowe, Lexie Thompson-Young

- Identifying electronic journals or online resources, procedures for adding electronic journals and online resources [free or paid]; SMEAR form; statistics
- SFX; MetaLib
- Vendor relations
- Set-up Choice Online Reviews log-on
- Licensing issues and procedures
- Consortia: UT System/TeleCampus, TexShare, AMIGOS, Greater Western Library Alliance

7. *Cataloging/Copy Cataloging/Catalog Maintenance/Serials Cataloging*

Tim Strawn, Loretta Acevedo, Jim Holmes, Al Rogers, Alan Ringwood

- Monographic search and hold routines
- In Process Control (INPC) -- Expedited cataloging; material on hold
- Transfer procedures; form at: <http://staff.lib.utexas.edu/divisions/cird/Forms/forms.html>
- Serials cataloging
- Internet cataloging
- Mincat
- OCLC Outsourcing
- Analytics for serials
- Migration issues for ILS

8. *Access Services/Reserves and EReserves/PCL Microforms (1.5 hours)*

Suzanne McAnna, John Ramage, Missy Nelson

- Overview of PCL, Collections Deposit Library (CDL), Library Storage Facility (LSF), microforms and space management issues
- Reserves and Circ Desk
- \*LLHIST, \*LLREPT functions; what can be generated by bibliographer and when to contact Warren Wilson-Reiner for special reports
- Other ICS functions to assist collection development
- Replacement book procedure and approval
- Tour of CDL and LSF
- Surplus
- Special Users: TexShare, Visiting Scholars, Library Guests

9. *Interlibrary Services*

Catherine Hamer, Wendy Nesmith, Kristin Walker

- Overview of Borrowing/Lending
- Obtaining reports from ILLiad - 2 week lead time
- Reciprocal agreements: AMIGOS, TexShare, Greater Western Library Alliance, Research Library Cooperative Program, CRL, Stanford/Berkeley - how it may affect your faculty and students
- Subsidized borrowing and document delivery
- D-DOC
- Buy on Demand project
- Document Express
- SFX links

10. *Library Instruction and Information Literacy Services (LIILS)*

Michele Ostrow, AJ Johnson, Meghan Sitar

- <http://www.lib.utexas.edu/services/instruction/index.html>
- Reserving rooms in PCL, FAC and other buildings--form: <http://staff.lib.utexas.edu/reservations/> - keys, reporting statistics
- Online calendar, online library instruction request form, online statistics form
- Class of the Day, Faculty Refresher, etc.
- Instructor listserv

11. *Gifts and Preservation/Conservation*

Jennifer Lee, Bob Wolfkill

- Review shelves and procedures within PCL; as appropriate, will include branches and special collections
- Surplus
- Binding of gift titles:  
<http://www.lib.utexas.edu/admin/cird/policies/subjects/attach2.html>
- Reformatting/binding issues and costs:  
<http://staff.lib.utexas.edu/divisions/tsod/bindingguidelines.html>
- Tour of book repair/conservation area
- Emergency procedures: <http://staff.lib.utexas.edu/emergency/index.html>
- Preservation Services (Staff Web site):  
<http://staff.lib.utexas.edu/divisions/tsod/preservation.html>

12. *Digital Library Services*

Rue Ramirez and Aaron Choate

- DLSD vs. ITS
- Digital projects workflow and unit organization
- Current projects
- Digitization center
- Contract services and pricing lists, Cost recovery and reinvestment in library projects
- Texas Digital Library, UTOPIA
- Bibliographer input on projects
- Web Authors
- Personal workstations

13. *Library Accounting and Bookkeeping*

Jim Doherty, Jeff Stuenkel, Aggie McAlester

- Credit cards
- Travel
- Reimbursements
- Invoices

14. *Listservs:*

- Cird-news (Jo Anne Newyear)
- Lib-pro (Alison O'Balle)
- Webauthors (Becky Schaefer)
- DBGL (Glen Worley)
- Instruction (Michelle Ostrow)
- Ref (Bill Kopplin)
- Eref (Joe Dobbs)
- CSA group

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## VI. Bibliographers and Their Role in the Institution

The bibliographer has a key evolving role in the life of the institution as a two way channel of communication between the library with all of its resources (collections, staff, services, knowledge, skills, abilities) and the faculty, staff, and students who benefit from these library resources. The bibliographer channels library resources to users, and channels user knowledge and needs back to the library. The bibliographer teaches library users, and the bibliographer learns from library users. The bibliographer brings books, journals, and other resources to the attention of users, and in a new and emerging role, recruits user-created content for the library's institutional repository, UTOPIA, and the Texas Digital Library. It is through interactions with its users that the library's collections are built and through interactions with its users that the library as an institution learns, grows, and evolves. This is what makes the library "the most powerful paradigm for the organization and management of knowledge ever invented."

- Effective libraries form communities and relationships built on credibility and integrity. Building these communities and relationships is the foundation upon which the library rests. Creating shared understanding with library customers and partners is the best path to a secure and fulfilling organizational future.
- "Quality academic libraries are both physical institutions and sets of services." Libraries serve a variety of purposes and some of those purposes can only be met through physical libraries and high quality informed human interaction, while other purposes can only be met through the delivery of digital information. Both the physical and digital libraries are critical components of meeting the library mission.
- "Libraries matter and librarians need to build from strength. The goal should be to improve and diversify from what libraries do well," to stay connected to those values that make us unique, and to evolve to satisfy emerging needs and behavior patterns.
- "We will continue to see revolutionary predictions based on oversimplification, bad economics, infatuation with technology, and failure to appreciate people. Librarians who fall prey to such predictions will suffer as will their users. Librarians must be ready to challenge unlikely projections, analyze faculty economics, and assert the importance of both the past and the present."
- Libraries must recognize and understand the differences between fundamental environmental change, current challenges and problems, and mere situational exigencies. The old idea of library progress was based on extreme predictability. Building a great library was like building the Great Wall of China - you simply put one stone (or book) on top of another. The environment was one of stability and predictability. The emerging idea of library progress is based on a dynamic ability to respond creatively to an ever-changing information landscape. It requires an effort of imagination to escape from the somewhat misleading, conceptually traditional, and familiar library of yesteryear. The library of today is neither stationary nor easily understood. No single concept or idea will organize everything, interpret everything, or unify everything. We are condemned or privileged, depending upon your point of view, to a professional life of change and complexity. All librarians, no matter what their role in the organization, will have to deal with informational uncertainty and increasing complexity. It is this complexity that separates the library from the corner bookstore and the common website. Change, unpredictable and unforeseen consequences, and complexity will continue to be the bed of ambiguity upon which we sleep each night. This is what will make our jobs interesting, and what makes the library future rich with possibilities. Appreciating complex libraries, complex resources, and collections of distinction, is what separates us from the simple-minded slogans and beliefs of the uninformed, and what lies close to the heart of the central purpose of higher education.
- Libraries cannot take refuge in unexamined verities or call upon comforting clichés if they expect to stay relevant while the world changes around them. "Libraries must serve users - but all users not just today's primary users. There's a difference between being

**VII. Appendix**

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user-oriented and pandering, and it's a difference libraries need to understand," if they are to continue to forge a unique, lasting, and effective role that differentiates them from their competitors and that maintains libraries' special credibility and social compact. The animals don't run the zoo, the patients don't run the asylum, the students don't run the class, and the users don't run the library - but they are the reason libraries exist.

- Print books will survive, but like the rest of the library they must continue to be critically evaluated and to demonstrate their usefulness vis a vis other demands on the library's scarce financial resources.
- The untrained, uninformed, and inexperienced don't know what they don't know. They are blind to information options, possibilities, and context. Part of the bibliographer's job is to supply the informational context and explain the universe of options and possibilities that do exist. To do this some of the bibliographer's most important jobs are to learn, to know the user, to know the library, and to know enough about their subject areas and tools to be able to place queries, issues, and problems within their proper context.
- The faculty and students at UT are already a success. They got where they are today without our help. One of our jobs is to make these already intelligent and effective people, more effective and more efficient, by providing them with a well conceived scholarly information environment to supplement the information environments that they are already familiar with.
- The bibliographer tree: The bibliographer's roots are in the earth of the collection, their trunk is their knowledge of the library, their leaves are the interactions with library users (that keep the library growing and that insure relevance and funding) and the bibliographer's fruit is the services and information the library delivers to users.

*Acknowledgement: credit for some of the above quoted passages and observations drawn from Crawford, Walt, Cites and Insights: Crawford at Large, August 2005, 5(9). (<http://cites.boisestate.edu/civ519.pdf>)*



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## V. Functions and Activities, *continued*

### D. Faculty Liaison

The importance of this role cannot be overstated. The bibliographer is the main human channel through which information about library resources flows to faculty and students, and through which information about student and faculty needs flows back to the library. Only through a thorough knowledge of the department - its research, its degrees, its faculty, its courses - can the bibliographer anticipate the collection needs of that department and be ready to provide whatever library assistance the department needs.

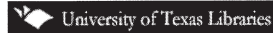
It should always be top priority to establish and maintain good communication with a departmental chair, library liaison and other interested faculty of the teaching departments. The departmental administrative assistant can be very helpful in obtaining the latest program review, names of new faculty, and listservs or email addresses for the faculty. Through the convenience of email it is possible to maintain contact with the entire faculty as well as the department's graduate students in order to solicit requests as well as gain advice concerning expensive items or important changes related to collection development. Also, information concerning access such as changes in the Library Catalog or materials newly available may be easily distributed in this manner. Email communications to the entire department should be sent judiciously and in line with the culture of the department. Distribute library information such as your name and how you can be reached, brochures, instructions for putting materials on reserve, how to request the purchase of new materials, etc., to all new faculty and inform all faculty on possibilities for library instruction/information literacy support for students. The bibliographer may also offer his or her assistance in planning and coordinating student library assignments. The subject bibliographer's work as liaison is an important component in building academic partnerships with the Libraries as well as building the collection.

In recent years the bibliographer's traditional roles and responsibilities, and the expectations that go with those roles, have begun to change. The library no longer sits comfortably and serenely alone at the center of either the faculty or student information universe. The Web has altered how people seek and use information.

The individual bibliographer's long-standing role as an information gatekeeper, the bibliographer's control over the collection, and the bibliographer's ability to know what information their user's can be expected to have access to, have been eroding for the last dozen years. There are many reasons for this change, but the primary reasons are the influence of the Internet, inadequate budgets, state and local consortia purchasing, new technologies such as SFX, OpenWorldCat, Google Scholar, Metalib, blogs, etc.; and changing user information behavior. As the environment in which bibliographers have traditionally functioned continues to evolve -- the activities and opportunities for bibliographer/faculty liaison are changing. New technologies, new library resources, and the changing role of the library on a modern university campus are opening up opportunities to work in different ways with faculty, students and researchers.

The three traditional major liaison activities: ordering library materials, reference assistance, and classroom instruction will continue, but these tasks will be joined over time by an enlarged menu of potential bibliographer tasks. As the nature of the library and of librarian's jobs shifts in response to the changing information environment, bibliographers will assume an expanded role as a liaison between the full range of library resources (Institutional repositories, metadata creation, RSS subject feeds, digitization, database creation and support, content management systems, Blackboard support, open access journals publishing, etc.) and University faculty and students. This wider range of activities will require training and support and some organizational re-engineering, but it also positions the library to better respond to changing campus needs, evolving information ecology, and helps to insure that the library will remain a critical and relevant part of the vital activities of the University.





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#### V. Functions and Activities, *continued*

##### D. Faculty Liaison, continued

A sampling of these bibliographer liaison roles (some of which will require assistance and/or training from other units) are listed below.

- Ordering books
- Ordering subscription journals & databases
- Reference assistance (both in person and through intervening technology)
- Integration of subject specific library content, contact information, and information literacy material into Blackboard and other faculty or department course-related tools
- Assistance with customer electronic access issues & the resulting internal follow through:
- Assistance with resolving traditional library customer access issues
- Both traditional and E-reserves information & assistance
- Assist customers with Library policy questions
- Maintain and discuss with faculty as appropriate both potential serials cancellations as well as a serials/database want list and a major one-time purchase want list (serial backfiles, one-time cost databases). These lists can be used to solicit departmental funds for the library, used for other development opportunities, or simply used to help define future strategic directions.
- Share general library news with the faculty (with careful regard to the departmental culture and the amount of information they want to receive about the library). Distribute appropriate library information such as new book lists, information about new databases, explain how the new ILS and federated searching works, the new coffee shop, conduct brief 1-2 question surveys, and reiterate to the faculty and department what useful library resources and services exist (ILL, computer workstations, wireless, SFX-ILL, Document express, UTOPIA, Alerting services, EndNote, the Texas Digital Library Institutional Repository, etc.) as ways to engage faculty in overall library directions.
- Keep the faculty up-to-date with library strategic directions and trends both generally and in the subject area, so that faculty are informed of actual and potential library directions (again without becoming a pest or an annoyance). Provide graduate orientation services, and faculty education (Eres, Open Access, IR, UTOPIA, MetaLib/SFX, Google scholar, etc.)
- Institutional Repository content recruitment, promotion, and support to further the provision of local faculty research to the world. This is a future area of bibliographer outreach once the Texas Digital Library is up and running, and once we have determined strategies for its construction and population.
- Multi-channel collection/discovery/access/ development i.e. work to insure that library resources are available and discoverable through multiple channels i.e. not just the OPAC, library Web pages, SFX, Metalib, Google Open Worldcat, RSS feeds, Google Scholar, etc. - but also through resources that the students and faculty use, whether that is course specific, department specific, or as simple as using IM and promotional posters/handouts on dept bulletin boards, or using the departmental faculty or graduate student listservs, etc. We want to make library resources available in an effective and efficient manner at the time and place of need.
- Student library support i.e. what type of student support would the faculty like to see? Course specific content for Blackboard? Course specific handouts? Librarian appointments? Librarian E-mail and IM accessibility? Classroom Instruction? A course Web page? Subject-based RSS feeds? Set librarian office hours? Library tours?
- Assist with library development opportunities.
- Subject Web pages & pathfinders (which are serving as an interim step on the path to more effective multi-channel delivery of this type of information in the future through a content management system, integrating the library more fully into course management modules [Blackboard, etc.], and making full use of future iterations of metasearching, OpenURL capabilities, RSS, etc.)
- Classroom instruction. This has long been a particularly effective means for initiating departmental liaison activities and getting to know faculty and graduate students. Bibliographers should however, be careful not to over-commit themselves to instructional

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activities to the point that instruction commitments have a detrimental effect on other areas of responsibility.

- Faculty and department strategic planning - avail yourself of opportunities for strategic discussion of departmental trends relating to faculty research and recruitment, students, publication trends in the field, promotion and tenure, and how the library fits into these developments. It is important for the bibliographer and the library to be aware of the different departmental cultures, trends, and strategic developments on campus, and to be on the look out for realistic collaborative opportunities.
- Open Access Journals - promotion, recruitment, support. The Texas Digital Library (IR) can host and archive Open Access journals edited or supported by the faculty (the policies on this are to come). Open Access journals are part of higher education's future, and the library will actively participate in their hosting and provision.
- Promote the library as a potential repository for faculty produced learning objects or assistance with faculty/department digital projects. This is more of a future liaison activity than a current one, though the library has always worked with different bibliographers and departments on faculty digital projects. As our IR, Utopia, and digital capabilities evolve, this is expected to be a bigger part of our future.



[V. Functions and Activities: Faculty Liaison](#)



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## V. Functions and Activities, *continued*

### E. Information Literacy

It is a library goal to reach students effectively and efficiently with library information, preferably at the time and place of need. Because the University has over 3,500 full-time instructors, over 20,000 courses, and the time of student need is frequently 3 a.m. -- and because the library has only 45 or so staff to provide instructional services -- it is preferable to use technological means to meet these instructional needs as much as possible and when appropriate. The ultimate goal is to have the capability of delivering library instructional information through multiple channels such as Blackboard, a Content Management System, Metalib subject portals, an RSS subject assistance feed, etc., in addition to traditional classroom instruction. The library does not expect bibliographers to become technicians or programmers. The intention is for Library Instruction Services, in collaboration with the Division of Instructional Innovation & Assessment, to put in place an appropriate workflow to assist bibliographers in delivering technology-based instruction, thus giving bibliographers more ways to reach their users and more channels to provide student and faculty support.

Bibliographers are encouraged to engage their faculty in discussions about how the library can best provide student library support. Many options, beside classroom instruction exist. As always, in any interactions with faculty (see the liaison section above) the goal is to further the liaison relationship and to engage the faculty in areas of mutual interest. Requests for classroom instruction have traditionally provided fruitful groundwork for developing deeper faculty/bibliographer relationships that can serve as a useful bridge to the development of class Blackboard modules, information literacy curricula, Metalib subject portals, and even faculty contributions of content to the library's institutional repository.

As we attempt to shift away from the resource intensive provision of face-to-face classroom instruction towards greater use of technology, we do not intend to shut the door on classroom instruction, which remains the Rolls Royce of our instructional offerings, but merely to shift our emphasis as to what is the most efficient, effective, routine, and practical means to use in order to convey useful skills and information about the library. To that end bibliographers should be fully capable of providing subject specific library instruction and information literacy classes for courses in their academic departments, but they should also be aware of other options for conveying this information. Faculty who assign undergraduate and graduate level research assignments have traditionally requested face-to-face instruction sessions, and you can certainly prudently advertise these services to your departments. Library classrooms with computer facilities are available for you to reserve for these sessions, or you may be asked to teach the session in a department lab or classroom. Paper or electronic handouts are usually made available by the bibliographer for the students who attend the session. Support is available for librarians from Library Instruction Services: <http://www.lib.utexas.edu/services/instruction/teachindex.html> This office can provide consultations for class content, assignment creation, teaching tips, handout templates, and advice on the full range of instructional options that you might want to consider. Library orientations are another component of information literacy that you may be called upon to provide. These sessions are usually for incoming graduate students and may be stand-alone sessions or incorporated into the department orientation. Orientations are an excellent way to get to know these students who will likely be spending several years at the University and to promote your services to the department. An underlying goal of all bibliographer instructional activities (beyond the ostensible delivery of information to users) is the broadening and deepening of the relations between the academic department and the library.



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#### V. Functions and Activities, *continued*

##### F. Web pages

Bibliographers are encouraged to work with WebCOG (the Web Content Group currently chaired by Jo Anne Newyear-Ramirez) and Research Services on the creation of Subject Research pages. The subject pages are expected to evolve and to eventually be joined by similar information provided through a content management system, MetaLib subject portfolios, RSS feeds, Blackboard modules, and other technologies. As these new technological options emerge, appropriate training and assistance will be provided.

Bibliographer web pages are currently placed in ÒResearch by SubjectÓ on the Libraries' home page and all these pages are created using a template. To set up a new web author account or have existing pages transferred to your account, contact Becky Schaefer in Digital Library Services: [rschaefer@austin.utexas.edu](mailto:rschaefer@austin.utexas.edu). Becky is also available for consultations about your web pages and regularly offers workshops for UT Libraries web authors.

##### G. Collection Evaluation

Evaluation projects are administered by the Research Services Division and may include statistical analysis of the collection in whole or part and/or comparisons of the collection to peer libraries. Bibliographers may be called upon to assist with some projects by providing detailed collections information and personal analysis such as collection strengths and weaknesses, prioritization of gap areas and identification of expensive materials to acquire. Bibliographer Annual Reports (BARs) are an evaluation tool sometimes required by the Associate Director for Research Services, and usually administered in the summer months. You may view BARs from previous years in the Research Services Division office, PCL 3.310. Another regular summer project is the Lapsed Serial Review (biennial). Bibliographers are asked to evaluate all serials on their fund code(s) for which there has been no financial activity for two years (payments or invoices). You may for example discover new contact information for the serial or that it has been suspended. Any information you can provide along with a decision to continue or cancel is best.



[V. Functions and Activities: Information Literacy](#)



[VI. Bibliographers and Their Role in the Institution](#)

### Examples of Liaison Services – from Wendi Arant-Kaspar and Judy Hart

Liaison is the relationship between the librarian (or library) and an identified customer group. It is the communication and interaction between them. As such, it is inextricably intertwined with other activities such as collection development, reference and instruction.

Attend lectures in the departments – show interest.

#### Communication

- Act as liaison to English department and departmental programs.
- Build a profile of the department, for both faculty and staff. Include their contact info, educational background, areas of research, classes taught and publications.
- Go to departmental meetings to promote library services and keep familiar with their concerns.
- Meet with and offer orientation for new faculty, and updates for department.
- Spend regularly scheduled time in the department (one afternoon every week). Also, have schedule office hours in the library.
- Set up and maintain departmental newsletter (By the Book) and distribute regularly.
- Use English@english.tamu.edu for broadcasting messages.
- Make appointments with faculty to discuss research, especially with new faculty.
- Obtain a syllabus and assignment description for classes (require it for any classes seeking library instruction).
- At the beginning of the semester write the faculty a letter describing the resources, new services in the library. Try to get on the class syllabus.
- Go to Orientation for students.
- Create a web page for the department, including specific resources and helpful links.
- E-mail faculty at the beginning of each semester to keep them up-to-date and remind them about scheduling instruction and ordering books.
- Hand out a faculty research survey to find out what they are doing.
- Attend departmental events and prepare special bibliographies related to these events.
- Go to faculty meetings.
- Go to meetings of the English Graduate Student Association.

#### Collection Development

- Purchase materials published by faculty in the Department of English and related programs.
- Verify that there are two copies of any book or material for required curriculum use in English; one for circulation, one for reserve.
- Buy any book or resource, including databases, multimedia or audiovisual, needed for faculty research in English - if items or funds are not available, find alternative access, i.e. via interlibrary loan or database access.
- Make valuable databases and tools available in the library, remotely or in a departmental computer lab if possible.
- Using a profile of faculty within the English department, order materials within their research or curriculum interests, and notify faculty when materials arrive.



- Seek out new sources of funding to support specific projects within specialist departments, e.g. Shakespeare, Judaica, Women's Studies, African American Literature.
- Maintain humanities reference section, weeding out-of-date items and updating pertinent materials as well as keeping them accessible.
- Ask input from departmental faculty in maintaining subject collection and putting together vendor profiles (Blackwell North America, Baker & Taylor).
- Contact professors or graduate students regarding new tools or publications in their areas of interest.
- Send a list of latest reference books to faculty; also, send list of specialized new materials to faculty based on their areas of interest.
- Market trial subscriptions and get feedback.
- New book lists sent to faculty.

#### Reference and Research Assistance

- Answer reference and research questions from departmental faculty through e-mail, by phone, or in person, making every effort to meet their needs.
- Do specialized research for faculty and students in English.
- Staff reference desk and electronic reference area as required, providing information and research guidance to faculty and students.
- Request syllabi requested on a regular basis. Encourage faculty to discuss class assignments with the librarian. Place books orders based on material in syllabi.

#### Bibliographic and Library Instruction

- Offer one-on-one instruction of library resources or information tools for faculty, both in-library or at their office.
- Do library and bibliographic instruction sessions for large or specialized classes in their classroom.
- Be available for consulting sessions with graduates and undergraduates, on specialized resources or individual projects.
- Give online instruction to students and faculty.
- Create bibliographies of library materials pertinent to classes.
- Go to first week of class, give 10-minute briefing on library and pass out subject bibliography if applicable.
- Set up topic-based workshops for faculty and graduate students.
- Hand out business card to students and faculty during BI sessions.
- Special workshops for undergraduate and graduate classes.

#### Liaison activities from Judy Hart (Science Liaison Librarian)

(Judy retired a few years ago and before she left, she shared some of her endeavors with her departments)

#### Resource and Collection Development and Maintenance



- Go through donated collections, select, and box items to be brought to the Gifts Department. After the items have been checked in LibCat, select items to be included in the collection.
- Review records in the "lost books" folders, and select titles to be replaced.
- Review NTIS and government documents profiles. Update if necessary.
- Review Approval stacks every week. Select items for the S/E Reference collection. (This could be combined with "maintain ref collection.")
- Review catalogs (print and online) for materials. (I include this because it consumes much of my time.)
- Collect collection information for departmental accreditations

Judy: "I would add assistance with cataloging to this list. These are tedious jobs but need to be mentioned since they take valuable time, and I don't think some people are aware of everything we do."

#### Reference and Research

- Read journal articles, attend seminars, and audit classes in the subject area to keep up-to-date on current research. (Some librarians attend conferences in the subject area.)

#### Outreach

- S/E Services writes and distributes the Sci/Tech Newsletter to every faculty member in the science/technology departments.
- Give tours to visitors who are guests of the faculty.

**COLLECTION MANAGEMENT SERVICES** University of Washington  
Libraries

[CMS Home](#) | [StaffWeb](#) | [Catalog](#) | [Gateway](#) | [UW Home](#) | [MyUW](#)

**New Selector/Liaison Training Checklist**

\*DRAFT\* (last updated 10/3/06)

1. First Steps for New Selectors
2. Understanding the Collection (See: First Steps 6)
3. Understanding Your Department (See: First Steps 7)
4. Selection of Monographs & DVDs/Videos:  
Tour of Division & Overview: Jackie Coats, Head, Monographic Acquisitions/Monographic Services Division
  1. Approval Book Display Shelves - Arrangement, Schedule & Procedures for Review
  2. Approval Plans - YBP & Others
  3. Placing Book Orders on YBP's Gobi
  4. Placing E-Book Orders
  5. Firm Order Requests (Web Form)
  6. Rush/Notify Orders
  7. DVDs/Videos
  8. Policies & Procedures for Selectors
  9. Who to Contact in Monographic Services
5. Selection of Serials:  
Tour of Division & Overview: Laurie Sutherland, Head, Serials Acquisitions/Serials Services Division
  1. Current Serials List
  2. Ordering New Serials (Print & Electronic)
  3. Standing Orders
  4. Canceling Serials
  5. Claims
  6. E-Journal Packages
  7. Rush/Notify Orders
  8. Firm Order Requests
  9. Exchanges/Serials Gifts
  10. Who to Contact in Serials Services
6. Selection of Electronic Resources:  
Tour of Division & Overview: Diane Grover, Electronic Resources Coordinator, and Tim Jewell, Director, IRCSC
  1. Guidelines for Acquiring E-Resources
  2. How to Order E-Resources
  3. Arranging Trials
  4. List of Current Trials
  5. Licensing
  6. E-Resources Usage Statistics
  7. ERM
  8. Who to Contact in CMS
7. Budget Management:  
Overview by Linda Di Biase, Collection Development Librarian
  1. How Budget is Allocated

2. Current & Previous Millennium Budget Statements
3. Other Financial Reports & Budget Information
8. Role in Academic Community
  1. Primary Contact between Libraries & Department (Meet with Paul Constantine, Assoc. Dean of University Libraries, Research & Instructional Services)
  2. Instruction & Information Literacy (Meet with Instruction & Information Literacy Working Group)
  3. Scholarly Communication (Meet with Mel DeSart, Chair, Scholarly Communication Steering Committee)
  4. Digital Initiatives (Meet with Ann Lally, Head, Digital Initiatives)
  5. Subject Website/Web Development (Meet with Chair, Browseable Resources Discovery Group)
    1. Subject Page Guidelines
    2. UW Libraries Web Server Information (Getting Started, Best Practices, Server Statistics)
  6. Professional Development & Training (Meet with Elaine Jennerich, Director of Organization Development and Training)
    1. Professional Travel
    2. Funding, Grants & Tuition Exemption
  7. List of Articles on Liaison Work/Strategies for Success
9. Gifts Program:

Overview by Carolyn Aamot, Manager, Gifts Program

  1. Overall Gift Procedures
  2. Accepting, documenting and reporting gifts
  3. Gift selection
  4. Donor relations
10. Gift Funds, Endowments & Other Sources of Funding
  1. Allen Endowment (Meet with Linda Di Biase)
  2. Friends of the Libraries Grants
  3. 21st Century Grants
  4. Grants (Meet with Grants Officer)
  5. Gifts & Endowment Budget Management Training
  6. Who to Contact in the Development Office
11. Other Procedures or Questions
  1. Replacements/Lost or Missing Books
  2. Long Overdue Item Lists
  3. Multiple Copy Reserve
  4. Placing Books on Reserve
  5. Transferring Rare Items to Special Collections
  6. Transferring Items to Remote Storage
  7. Transferring Items to/from Other Library Units
  8. Adding Items to the Digital Registry
12. Collection Management:

Overview by Linda Di Biase, Collection Development Librarian

  1. UW Collection Management Policies
  2. Collection Evaluation
    - ILL Reports
    - Gobi Peer Reports
    - OCLC Collection Analysis Software
    - Circulation Statistics (Contact Linda Di Biase & Corey Murata)
    - Serials Use in III

- Collection Size Statistics
  - E-Resources Usage Statistics
  - Libraries Assessment Surveys & Reports
13. Preservation (Overview by Gary Menges, Administrator, Preservation Program)
  14. Important Groups/Committees
  15. Other Training Opportunities:
    1. Millennium Overview Training
    2. Millennium Create Lists Training
    3. ERM Overview Training
    4. Subject Page Party (BRDG)
    5. UW Computer Training
    6. MyFinancial Desktop

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RCMS - MONOGRAPHIC SERVICES - SERIALS - IRC

Last modified: March 2, 2006 Tuesday November 28, 2006

The Liaison Forum is open to all campus library staff members who are involved with or interested in library liaison work. Its purpose is to allow us to share, learn and plan together. The Forum meets monthly, usually on the third Wednesday, 12:00-1:15. Meeting locations vary. The Liaison Forum Planning Group plans the meetings, and welcomes your input.

Participants in the Forum exchange information through a group email address, [liaiseforum-l@library.wisc.edu](mailto:liaiseforum-l@library.wisc.edu).

[Our Next Meeting](#) | [Upcoming Meeting Dates](#) | [Past Meeting Topics and Notes](#) | [Planning Group Blog](#) | [Wiki](#) (*see also wiki instructions*)

## Our Next Meeting

Wed. March 21, 12:00 noon - 1:15 pm, 126 Memorial Library **Topic: Office of Scholarly Communication and Publishing: The Next Step** At this meeting Ed Van Gemert will update us on the status of the OSCP.

## Upcoming Meeting Dates

Wed. April 25, 2007. 12 noon - 1:15 pm, Wendt Library Conference Room. **Topic: Liaison Librarians and Collection Development** *Note:* This meeting is on the fourth Wednesday to avoid conflicting with WAAL.

## Past Meeting Topics and Notes

Wed. Nov. 30, 2005, Red Gym **Organizational Meeting: What Should the Liaison Forum Do?** [Expanded notes from the meeting](#)

The Liaison Forum Series is intended to bring folks involved or interested in library liaison work across campus libraries together to share, learn and plan. Toward that end the first forum was an opportunity to hear what participants would like the liaison forum to do. What needs and interests do we have that we would like the forum to address? What issues come up in liaison work that we would like to discuss with other liaison colleagues? The forum included sharing and brainstorming on these topics.

Wed. Jan. 19, 2006 Union South **Topic: Developing a Tool Kit of Resources for Campus Liaison Librarians** Expanded notes not available

The focus of this discussion was developing a tool kit of resources for campus liaison librarians. This topic came up frequently at the November Liaison Forum in which we talked about issues and needs related to our work as liaison librarians. We discussed what we would like to see included in the tool kit and how to make that happen! Jean Ruenger-Hanson demonstrated the toolkit developed earlier as part of the My Librarian Project, <http://staff.library.wisc.edu/MyLibrarian/toolkit.htm>.

Wed. Feb. 15, 2006 Memorial Union **Topic: Scholarly Publishing and the Office of Scholarly Communications** [Expanded notes from the meeting](#)

The focus of this discussion was scholarly publishing and the new Office of Scholarly Communications. Ken Frazier joined us to share his thoughts on the subject and to answer some of the questions we raised for him at the last Liaison Forum. This topic is of particular interest because we are all starting to get questions about scholarly publishing from our faculty and grad students.

Mon. March 20, 2006, Pyle Center **Liaison Retreat** [Expanded notes from the meeting](#)

The purpose of the retreat was to talk with each other about what we do as liaison librarians in our different libraries and begin to develop a common definition for liaison work that we can use to promote and market our program. These activities were at the top of our wish list for future activities for our liaison group when we met in November. During this retreat, we shared rewarding liaison experiences and talked about what it means to be a liaison librarian in our different libraries. We hope that these conversations have given us all a better understanding of the nature of liaison work on campus, and that this understanding will in turn enable us to come up with a basic definition for our work. We also had some fun coming up with some strategies to use in marketing our program.

Wed. April 19, 2006 , Memorial Union **Topic: Communication Strategies** [Expanded notes from the meeting](#)

As liaisons and librarians, we all understand the critical importance that communication plays in our liaison activities. At this forum we discussed various strategies and issues related to communication between liaison librarians here on campus. Members of the working group have investigated a number of possible strategies for facilitating communication between liaisons, including RefWorks, wikis, and blogs. We demonstrated and discussed these tools, and other issues related to communication in liaison work.

Wed. May 31, 2006, College Library **Topic: Building an Online Collaborative Toolkit** [Expanded notes from the meeting](#)



In this meeting we moved ahead on the liaison toolkit project that we talked about doing at the previous Liaison Forum. During the hands-on portion we learned how to upload documents to our wiki (online collaborative website) toolkit. We also shared with each other some of the liaison-related items that each of us already has developed that could go into our toolkit, discussed what resources still need to be developed that volunteer teams could work on, and decided on a few conventions for our new wiki. [Instructions for contributing to the wiki](#) were shared after the meeting.

Wed. June 21, 2006, College Library **Topic: Off-Site Preservation Facility** Expanded notes not yet available

The focus of this discussion was the relocation of some library materials to our proposed off-site preservation and shelving facility: what materials will be moved, how can users access them, and how do we as liaison librarians explain this project to our users. Ed Van Gemert presented and led the discussion.  
*No Forum in July*

Wed. August 16, 2006 **Topic: Planning for Fall Orientation and Outreach Activities**

Wed. September 20, 2006 **Topic: UW Digital Collections--A Suite of Services for the UW Community**

Wed. October 18, 2006 **Topic: How Do We Measure Success?**

Wed. November 15, 2006 **Topic: Making Connections through Committees**

*No Forum in December*

Wed. January 17, 2007 **Topic: Looking Back on Fall and Ahead to Spring**

Wed. February 21, 2007 **Topic: Dealing with Disgruntled Patrons and Faculty--Seeking Positive Outcomes**

Liaison Forum Planning Group

. [Abigail Loomis](#) Facilitator (2-4308) . [Tom Durkin](#) (2-7340) . [Carrie Kruse](#) (3-2108) . [Beverly Phillip](#)  
 . [Janice Rice](#) (3-7146) . [Lisa Saywell](#) (2-9470) . [Gerri Wanserski](#) (3-4205) . [Amanda Werha](#)

Last updated: March 5, 2007

