6-30-2017

Collection Development & Technical Services Department Annual Report: July 1, 2016 – June 30, 2017

Patricia Pettijohn

Nelson Poynter Memorial Library

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Collection Development & Technical Services Department
Annual Report
July 1, 2016 – June 30, 2017

University of South Florida St. Petersburg

Compiled by Patricia Pettijohn

2017
## Statistical Snapshot:

<table>
<thead>
<tr>
<th></th>
<th>2016/17</th>
<th>2015/16</th>
<th>2014/15</th>
<th>2013/14</th>
<th>2012/13</th>
<th>5 year Change</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Monograph Titles</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cataloged</td>
<td>2,811</td>
<td>1,631</td>
<td>2,121</td>
<td>1,962</td>
<td>2,148</td>
<td>31%</td>
</tr>
<tr>
<td><strong>Electronic Books</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cataloged*</td>
<td>290</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>*Included w/monographs</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Juvenile Titles</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cataloged</td>
<td>305</td>
<td>382</td>
<td>168</td>
<td>249</td>
<td>245</td>
<td>25%</td>
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<tr>
<td><strong>Media Titles</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cataloged</td>
<td>38</td>
<td>71</td>
<td>653</td>
<td>348</td>
<td>497</td>
<td>-92%</td>
</tr>
<tr>
<td><strong>Total Books &amp; Media</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cataloged</td>
<td>3,154</td>
<td>2,084</td>
<td>2,942</td>
<td>2,559</td>
<td>2,890</td>
<td>9%</td>
</tr>
<tr>
<td><strong>Periodicals Received</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>2,851</td>
<td>2,881</td>
<td>2,629</td>
<td>2,373</td>
<td>2,669</td>
<td>7%</td>
</tr>
<tr>
<td><strong>Periodicals Withdrawn</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>2,350</td>
<td>1,844</td>
<td>9,022</td>
<td>2,358</td>
<td>11,006</td>
<td>-79%</td>
</tr>
<tr>
<td><strong>Total Periodicals</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>189,312</td>
<td>188,761</td>
<td>187,764</td>
<td>194,157</td>
<td>194,142</td>
<td>-2.5%</td>
</tr>
<tr>
<td><strong>Active Serials Titles</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>185</td>
<td>185</td>
<td>112</td>
<td>120</td>
<td>120</td>
<td>54%</td>
</tr>
<tr>
<td><strong>Total Microfiche</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(by piece)</td>
<td>2,045</td>
<td>2,045</td>
<td>2,045</td>
<td>2,045</td>
<td>2,045</td>
<td>0%</td>
</tr>
<tr>
<td><strong>Total Microfilm</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(rolls)</td>
<td>7,118</td>
<td>7,118</td>
<td>7,118</td>
<td>7,118</td>
<td>7,118</td>
<td>0%</td>
</tr>
<tr>
<td><strong>Total Microform</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>9,163</td>
<td>9,1663</td>
<td>9,163</td>
<td>9,163</td>
<td>9,163</td>
<td>0%</td>
</tr>
<tr>
<td><strong>Books Titles Added</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>3,116</td>
<td>1,743</td>
<td>2,289</td>
<td>2,211</td>
<td>2,733</td>
<td>14%</td>
</tr>
<tr>
<td><strong>Books Titles Withdrawn</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>419</td>
<td>519</td>
<td>3,011</td>
<td>3,888</td>
<td>15,278</td>
<td>-97%</td>
</tr>
<tr>
<td><strong>Books: Total Titles</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>200,633</td>
<td>199,139</td>
<td>199,861</td>
<td>201,538</td>
<td>214,423</td>
<td>-6.4%</td>
</tr>
</tbody>
</table>
**Departmental Overview:**
Collection Development & Technical Service (CD&TS) is responsible for the stewardship and strategic development of library collections, including the acquisition, cataloging, preservation, physical processing and management of library materials in all formats. The department manages the materials budget, and provides annual statistics that describe technical activities and physical collections. The Head of Collection Development & Technical Services provides analysis of the overall strengths and weaknesses of the collections, coordinates the library liaison program, and collaborates with librarian liaisons to provide discipline- and subject-specific reports, and to identify material for deselection, renewal, and preservation. The department receives, assesses and communicates with book donors about gift materials.

**Significant Departmental Accomplishments:**

**Collection Development**
In response to legislative mandates, student demand and changing policy, the library has initiated a Textbook Project in which required student texts are acquired, by purchase or gift, and added to the Reserves collection for short term loan. Whenever possible, electronic books are preferred to print for the Textbook Project. In addition to acquiring new books, the library endeavors to identify books already held in print or electronic formats, for relocation to reserves. Textbooks are purchased for all general education and exit courses, identified by the Head of Collection Development; textbooks for individual classes are identified by library liaisons. The project is fairly detail intensive, but the work is shared among the liaisons and with the Access services department that oversees and organizes Reserves. Metadata identifying textbooks and their associated courses is entered when ordered, and refined when batch loaded, allowing the titles to be tracked.

Analysis and deselection of material that is superseded, outdated, or available electronically continues. This year fewer periodicals and books were weeded than in past years, although almost as many periodicals were removed as were added. Media deselection increased, as a result of a project to identify and replace outdated VHS and audiocassette formats. The recent addition of streaming media collections to the USF system allowed us to target for deselection outmoded formats that we had retained due to demand for specific titles and content. A large scale deselection of microform is underway and extensive weeding of periodicals is planned for 2017-2018.

In 2016-2017 closer communication with the USF library system has helped to decrease duplication of USF system electronic book purchases, and we continue to move forward in our transition to electronic resources. The processing of electronic books has been improved and standardized, and we increasingly acquire both films and books in digital formats.

Acquisition of juvenile titles has more than doubled in the past year, and has increased about 40% over five years. Many of these titles are firm orders, not approval plan purchases, and were selected to enhance and support the multicultural children’s books in the juvenile collection. Media acquisitions, on the other hand, have dramatically decreased, due to the introduction of Kanopy and the transition to streaming media platforms in academic environments.
### Preservation Activities

Natalie Polson has continued to develop her skills in minor book repairs, although the number of repairs continues to decline as we increasingly replace damaged materials with electronic books when possible. A total of 30 books were repaired or sent to the bindery.

### Periodical Collections

- Newspapers and oversized journals were routinely culled.
- Retention policies revised in 2015-2016 were applied and maintained.
- As noted, this has resulted in negligible growth of the print periodicals collection. Since the retention policies have essentially achieved null growth, we expect our print periodical holdings to decrease substantially when we complete our next major periodicals deselection in 2017-2018, as journals available electronically are deselected through analysis of JSTOR, Oxford, Project Muse and other large journal packages with stable online content.

<table>
<thead>
<tr>
<th>Periodicals Held (6/30/16)</th>
<th>188,801</th>
</tr>
</thead>
<tbody>
<tr>
<td>Periodicals received</td>
<td>2,851</td>
</tr>
<tr>
<td>Periodicals withdrawn</td>
<td>2,350</td>
</tr>
<tr>
<td><strong>Total Periodicals Held 6/30/2017</strong></td>
<td><strong>189,312</strong></td>
</tr>
<tr>
<td>Claims placed</td>
<td>47</td>
</tr>
<tr>
<td>Claims received</td>
<td>12</td>
</tr>
<tr>
<td>Serials received</td>
<td>68</td>
</tr>
</tbody>
</table>

### Book Deselection Activities

#### Circulating Collection

- Weeding and relocation was completed in the BF, DS, HF, N, and PS subclasses, while targeted deselection continues in the PR range.
- Shelf lists and circulation reports were provided to guide deselection.
- Recreational reading collection was downsized and older popular materials were weeded.

### Library Liaison Program

- The Librarian Liaisons were assigned new subject areas and departmental affiliations in response to new programs and impending retirements.
Collection Assessments

Significant Personnel Accomplishments:

Service:
Patricia Pettijohn:
Library Service:
- Library Diversity Committee, member
- Library Faculty Council, member
- Library Space Committee, member
- Poynter Library Liaisons Team, Chair
- Poynter Library Leadership Team, member

University Service:
- Chancellor’s Advisory Council on Diversity and Inclusive Community, University of South Florida St. Petersburg, member
- Graduate Council, Chair
- Title IX Team, member
- Faculty Senate, member (replacing Deb Henry who was interim Dean)
- Campus Diversity Officer Search Committee

Christine Dunleavy:
Library Service:
- Poynter Library Leadership Team, member
- Poynter Library Strategic Planning Team, member

University Service:
- FALSC ILS implementation Cataloging/Authorities working group. Weekly meetings April 2016-present
- University of South Florida. ILS implementation Planning Committee. Semi-monthly meetings. June 2016-present

Natalie Polson:
Library Service:
- Library Diversity Committee, member
- Library Exhibits Committee, member

University Service:
- FALSC ILS Serials working group. Weekly meetings April 2016-present

Professional Development:
The Department continues to respond to substantive changes in cataloging practices, integrated library system features, and system and state-wide initiatives. All require constant procedure review, operation modification and staff training. During the past year, the department has demonstrated flexibility and openness to change by adjusting to re-assignments of duties and adopting new approaches to ensure that core functions are performed in a timely manner.

Patricia Pettijohn:
- Technical Training, in-person:
Fri Aug 5, 2016, Discussion and Guidance - Working with Transgender Students
Thu Sep 8-Sep 9, 2016, Title IX Conference, USF Tampa
Tue Apr 25, 2017, All day, USF Sierra Cataloging In Person training - Hillsborough
Wed Apr 26, 2017, All day, USF Sierra Acquisitions In Person Training - Hillsborough
Thu Apr 27, 2017, All day, USF Sierra Acquisitions In Person Training P 2 - Hillsborough

Webinars:
- Wed Jul 6, 2016, Sierra Overview Profile training FALSC
- Thu Sep 22, 2016, Measuring Reach and Impact of Books and Chapters
- Wed Nov 30, 2016, SWFLIN Setting Departmental Goals Webinar
- Wed Nov 30, 2016, Budget Transparency in Collection Development – online
- Tues Feb 4, 2017 Current Topics For Title IX Training: Implementation, Awareness & Compliance
- Thu, June 8, 2017, ACRL-Librarians as Stakeholders in Managing the Research Enterprise
- Multiple Accounting Units and Encore suites online mtg

Christine Dunleavy:
USF:
- FAST 150 General Ledger. 9 August 2016
- FAST 250 Finance Mart Reporting. 23 August 2016
- FAST 110 Financial systems introduction. 7 September 2016
  FAST 210 Financial systems intermediate. 13 September 2016
  FAST 200 Accounting Concepts. 21 September 2016
- FAST 250 Finance Mart Reporting. 23 August 2016
- USFSP SafeZone Ally training USFSP Facilitator Victoria Beltran, October 2016
- USFSP Human Resources. Making the Transition from Individual Contributor to Leader, February 2017
- USFSP Diversity and Inclusion, Chief Diversity Officer Cecil Howard, June 2017
- Education. University of South Florida School of Information Studies. Master of Arts in Library and Information Science.

External training:
- TBLC Project Management and Workflow for Digitization Projects by Leigh A. Grinstead of LYRASIS Digital Services, November 2016
- FALSC ILS implementation Cataloging/Authorities working group training. (Reports, Cataloging, Acquisitions, EMS). Throughout year, March 2017
- SWFLIN. Setting priorities in copy-cataloging (Webinar). Maurie McCourry, presenter. March 2017
- FALSC & III Tue Apr 25, 2017, All day, USF Sierra Cataloging In Person training – Hillsborough
- FALSC & III Wed Apr 26, 2017, All day, USF Sierra Acquisitions In Person Training – Hillsborough
- FALSC & III Thu Apr 27, 2017, All day, USF Sierra Acquisitions In Person Training P 2 – Hillsborough
- Multiple Accounting Units and Encore suites online mtg, July 2017

Education:
• University of South Florida School of Information Studies. Master of Arts in Library and Information Science 2016-present, enrolled full time, expected graduation Fall 2018.

Natalie Polson:
Self-paced learning through collaboration, online tutorials, and FALSC webinars:
• FALSC & III Tue Apr 25, 2017, All day, USF Sierra Cataloging In Person training - Hillsborough
• FALSC & III Wed Apr 26, 2017, All day, USF Sierra Acquisitions In Person Training - Hillsborough
• FALSC & III Thu Apr 27, 2017, All day, USF Sierra Acquisitions In Person Training P 2 - Hillsborough

Specialized Coursework:
• PCard Reconciliation refresher
• Annual FWS federal work study student supervision training

**Future Challenges:**

Migration:
The migration to the new ILS is now scheduled for July 2018. There remain a staggering number of unresolved issues and problems that will occupy the department’s time over the next year. Both Christine and Natalie are spending increasing amounts of their time working on FALSC workgroup projects, including extensive testing and analysis of data. Both have become acknowledged as core members of their respective groups, and in many case are leading or facilitating meetings. While we will eventually need an opportunity to focus more on customizing III procedures to meet the unique needs of our institution. Although both are currently able to keep pace with their daily tasks, we are expecting ongoing projects, such as the textbook project and the weeding and relocation of materials on the first floor of the library, to

We will need to document our unique processes and procedures before the new fiscal year, train staff in use of the new ILS, and help to prepare for the public rollout of the ILS to students and faculty. While we are part of a shared bibliographic catalog, USF and USFSP have their own needs and requirements. For example, we will be one of the universities that are part of a multiple unit accounting system, while most of the colleges and many of the universities have elected a single accounting system. Both have limitations and strengths, but for the USF System libraries, increasing collaboration and cooperation between accounting units will be required.

Textbooks:
As part of the USFSP Library Student Textbooks Project, we have created metadata for use with textbook purchases that allows us to identify and track textbooks with a goal of better understanding the budgetary requirements, circulation, and usage patterns of the textbooks. By next fiscal year we aim to compile the kind of data that will allow us to assess the long term sustainability of the project. At the same time, we are increasingly moving to electronic book purchases. Better communication and collaboration with the USF System electronic book PDA and DDA programs will hopefully allow us to decrease duplication.

USFSP Growth: In the future, USFSP plans to add substantive new programs, majors and minors, as well as students. As new courses and programs require library resources, collections must be constantly assessed and developed to support new areas of research and teaching.
Deselection and Relocation of Library Materials and Collections:
While the past year saw decreases in deselection and relocation of print books, we plan to embark on a new round of periodical deselection in the coming year, and major weeding projects based on outdated formats in our media collection. In addition, the Education liaison plans another assessment of the instructional media collection. We have begun a large scale weeding of microform (Washington Post) and will complete that project.
We also are or will be collaborating with the Special Collections department to relocate or deselect materials identified by Special Collections staff; relocate current media with Florida content to Special Collections, and relocate materials from the Remote location in Harbor Hall to the circulating or special collections.

Collection Assessments and Development:
As new majors, programs and degrees are launched, or old programs are evaluated, assessments of the collections will be required. In addition, as programs colleges and schools apply for programmatic or regional accreditation or reaccreditation, assessments will be required. In addition, as new librarians join the USFSP library, liaison activities will need to be revised.

Future Directions:
The department will need to focus more intensively on the migration to a new ILS as we approach July 2018. Due to continuing legislative mandates, and the adoption of textbook affordability as a new metric by the Florida BOG, the Textbooks project will become more important, and require increasing amounts of staff time and the monographic acquisitions budget.

It is increasingly imperative that we establish procedures and processes for USFSP library liaisons and USFSP faculty to request materials through the USF Libraries System. This is especially true of streaming media, electronic books, and databases. We have begun some of this work as part of the procedures being developed for acquiring electronic books and media, working with USF Libraries staff involved in batch-loading large e-book packages.

I would like to see us work more closely with teaching faculty to promote OER textbooks and to consider using electronic books that can be shared as textbooks.

As Christine moves toward completion of her MLIS, she will continue to enhance her career by increased involvement in professional organizations, including presenting and publishing scholarly research.