

**OHIO WESLEYAN UNIVERSITY LIBRARIES**

Objective Implementation Worksheet

2006/07

**Department: Technical Services**

Draft on 9/27/06, modified 04/17/07, 4/25/07

<b>Dept</b>	<b>Goals and Objectives</b>	<b>Strategies to Complete</b>	<b>Responsibility</b>	<b>Complete Date</b>	<b>Notes</b>
T.S. 1	Continue processing books to make them shelf ready within three weeks from date of receipt.	<ol style="list-style-type: none"> <li>1. Acquisitions staff receive books;</li> <li>2. Cataloging staff catalog and process them</li> </ol>	Tech. Serv. Staff	Ongoing	
T.S. 2	Update and maintain the local database to ensure internal consistency in the database	Trouble shooting, contact Info/Sys, or Upfold	Jin	Ongoing	
T.S. 3	Continue ongoing processing of the Five Colleges of Ohio historical and current government documents	<ol style="list-style-type: none"> <li>1. Attend OH5 gov docs mtg;</li> <li>2. Continue cataloging work</li> <li>3. Send 28 original titles to TechPro in January 2007 after a new contract signed</li> <li>4. Load records when OCLC is done (Jin)</li> <li>5. Process TechPro records</li> </ol>	Clinton, and Gao; Judy cataloged current Gov Docs from September to December before Clinton started	Ongoing of cataloging work. OCLC TechPro Project is on hold	There is no budget for the TechPro project this year.
T.S.4	Dewey Books Project Plan	<ol style="list-style-type: none"> <li>1. Continue to reclass 300's</li> <li>2. Select alumni cards for 300's (ongoing)</li> <li>3. Insert main entry cards (for foreign language books only), check on</li> </ol>	Dewey Books Comm: Cataloging staff, work	300's 2/31/07	Plan to complete 15% this year

		CONSORT, shelve and review 300's (ongoing)	study students, liaisons		
T.S. 5	Dewey Project Workflow	<ol style="list-style-type: none"> <li>1. Hire one part-time cataloger to reclass 900's (remaining books) and 300's original records (ongoing)</li> <li>2. OCLC TechPro Project for original cataloging work (ongoing) <ul style="list-style-type: none"> <li>• Prepare to renew contract (on hold)</li> <li>• Prepare books for the project (on hold)</li> <li>• Deliver 100 copies of book title pages to OCLC (on hold)</li> <li>• Load records from disk when it is done by OCLC</li> <li>• Process the books after received books and load records</li> </ul> </li> </ol>	Dewey Books Comm: Cataloging staff, work study students,	Ongoing OCLC TechPro Project is on hold	There is no budget for the TechPro project this year.
T.S. 6	RetroCon for Archives of Ohio United Methodism	<ol style="list-style-type: none"> <li>1. Prepare to renew the contract and make changes (work with Holliger) (on hold)</li> <li>2. Prepare 900 cards to be sent to OCLC</li> <li>3. Load records through MARS when it is done by OCLC</li> <li>4. Train students to process them</li> </ol>	Jin, Orahood, Holliger	Ongoing	Received \$2,800 for this project which needs to be spent by 12/31/07. Xudong is working on a contract with OCLC

T.S. 7	PromptCat	<ol style="list-style-type: none"> <li>1. Continue to use PromptCat for all YBP slip and firm orders</li> <li>2. Continue to use GOBI2</li> <li>3. Continue to let liaisons to use GOBI2 selection function for slip orders; Acquisitions use GOBI2 export function for slip orders and selection and export functions for firm orders</li> <li>4. Keep track of the process</li> </ol>	Jin, Wiesner, Laurence, Liaisons	ongoing	
T.S. 8 New	Investigate Emery-Pratt's PromptCat Service	<ol style="list-style-type: none"> <li>1. Make a proposal</li> </ol>	Jin, Wiesner, Laurence	On hold	There is no budget for it this year
T.S. 9	Establish and maintain Technical Services Web page	<ol style="list-style-type: none"> <li>1. Working group change (done)</li> <li>2. Web page design</li> <li>3. Modify the main page</li> <li>4. Input documents</li> <li>5. Complete the internal Webpage</li> <li>6. Complete Public website</li> </ol>	Working group: Laurence (Public Website), Jin (Internal Webpage)	12/31/07	(On hold since March, 2005. Resumed since September 2005; On hold since February 2006)
T.S. 10	Maintain and update T.S. Procedure Manuals (both "what" and "how" manuals)	<ol style="list-style-type: none"> <li>1. Put the manuals in electronic version</li> <li>2. Maintain and update the manuals when changes have made</li> </ol>	T.S. staff	Ongoing	After the T.S. Web page establishes, 2 objectives will merge
T.S. 11	Millennium Modules	<ol style="list-style-type: none"> <li>1. Continue to work on Cataloging, Acquisitions, and Serials modules</li> <li>2. Discuss and solve problems</li> <li>3. Share experiences with each other</li> <li>4. Make new procedures</li> </ol>	T.S. staff	Ongoing	

T.S. 12	OCLC Connexion	<ol style="list-style-type: none"> <li>1. Continue to work on Connexion</li> <li>2. Upgrade to Client newer versions if available</li> <li>3. Discuss and solve problems</li> <li>4. Share experience each other</li> <li>5. Make new procedures</li> </ol>	T.S. Staff	Ongoing	
T.S. 13	Quality Control	<ol style="list-style-type: none"> <li>1. Work on errors in the system, such as ICODE1, ICODE2, ITYPE, IUSE3</li> <li>2. Work on other errors such as copy numbers, dup barcodes, correct locations, etc.</li> </ol>	Jin	12/31/2007	
T.S. 14 New	Discussion series on new trend and topics related to Technical Services	<ol style="list-style-type: none"> <li>1. Select articles to read and discuss the articles and related topics at the Technical Services meeting</li> <li>2. Discuss what changes we should make to follow new trend of Technical Services in academic libraries</li> </ol>	T.S. Staff	On going	
T.S. 15 New	Hire a new Tech. Services and Government Documents Assistant	<ol style="list-style-type: none"> <li>1. Establish a search committee (done)</li> <li>2. Complete a search plan (done)</li> <li>3. Post ads (done)</li> <li>4. Review and select candidates for a campus interview (done)</li> <li>5. Make an offer (done)</li> </ol>	Jin, Gao, Laurence, Orahood, Scott	Done	
T.S. 16 New	Hire a new Serials Librarian	<ol style="list-style-type: none"> <li>1. Establish a search committee (done)</li> <li>2. Complete a search plan (done)</li> <li>3. Post ads (done)</li> <li>4. Review and select candidates for a campus interview (ongoing)</li> <li>5. Make an offer (ongoing)</li> </ol>	Jin, Baugess, Laurence, Orahood, Scott	May 2007	

T.S. 17 New	Hire a part-time Serials Librarian	1. Hire the former Serials Librarian Vickie Melicher to work part-time until we hire a new Serials Librarian	Jin	Done	
Cat. 1	Catalog all formats of materials	Catalog library materials, including books, music CDs, DVDs, videos, gov docs, Historian books, gift books for the library and CRC and other departments	Orahood, Laurence, Baugess, and Jin	Ongoing	
Cat. 2	Work on CONStor materials	1. When receive a list of books to be sent to CONStor from liaisons, change the codes in item records 2. Send materials to CONStor	Laurence, Orahood, Jin, and Derr	Ongoing	Sending items to CONSTOR on hold right now temporarily until we hear from Michael.
Cat. 3	Reference weeding	1. Get reference books from Burnam 2. Change locations or withdraw items	Orahood, Laurence	Ongoing	
Cat. 4	Change Location or Withdraw items	1. Receive books from liaisons in Beeghly, Music and Science. 2. Change location or Withdraw items.	Orahood, Laurence	Ongoing	
Cat. 5	Copy Cataloging Music LPs (total 4500 LPs)	1. Install OCLC Connexion and Millennium to Peter's computer (Done) 2. Prepare procedures (Done) 3. Train Peter (Ongoing) 4. Cataloging	Szabo, Orahood, Jin	In two years On going	
Cat. 6 New	Music MARC Records	1. Setup the contract (done) 2. Receive and load OCLC bib records 3. Jin shows Szabo to edit item records	Jin, Szabo, Orahood, Upfold	Ongoing	
CD. 1	Interprets, supports, and maintains Collection	1. Put the manual in electronic version (by 12/31/06)	Jin	Ongoing	

	Development policies and procedures manual	2. Maintain and update the manual			
CD. 2	Distribute Choice cards, YBP slips, and catalogs	Distribute monthly Choice cards and bi-weekly YBP slips to liaisons	Jin	Ongoing	Will stop to receive YBP slips when liaisons are comfortable with GOBI2 selection
CD. 3	Process gift books	<ol style="list-style-type: none"> <li>1. Receive gifts from donors, publishers, and institutions.</li> <li>2. Check duplications on CONSORT</li> <li>3. Send them to liaisons for evaluation</li> <li>4. Send thank you letters</li> <li>5. Maintain Gift Database</li> <li>6. Keep statistics</li> <li>7. Notify Cataloging Manager to prepare new book plates</li> <li>8. Send gifts identified as priorities to Cataloging Dept after barcoded and targeted</li> <li>9. Box accepted gifts for barcoding, targeting, and cataloging at a later date (when supply shortage ends).</li> </ol>	Baugess (Jin did the work from September through December), liaisons, Orahood, Laurence, and Jin	Ongoing	
CD. 4	Process Historian books	<ol style="list-style-type: none"> <li>1. Pick up Historian books from History Dept each week</li> <li>2. Check duplications in CONSORT</li> <li>3. Keep statistics</li> <li>4. Send books to Cataloging Dept after targeted. Joyce will barcode books.</li> </ol>	Baugess, (Jin did the work from September through December),	ongoing	

		<ol style="list-style-type: none"> <li>5. Catalog work.</li> <li>6. Return duplications</li> <li>7. Return books marked "For Review Only"</li> </ol>	Laurence, Orahood		
CD. 5 New	Process Math books	<ol style="list-style-type: none"> <li>1. Check with Dr. Jeff Nunemacher and Pick up Math books from Mathematic Dept</li> <li>2. Check duplications in CONSORT with blue gift slips</li> <li>3. Send non-duplications to Green for review</li> <li>4. Keep statistics</li> <li>5. Send books to Cataloging Dept after targeted and barcode.</li> <li>6. Catalog work.</li> <li>7. Return duplications</li> </ol>	Baugess (Jin did the work from September through December) Laurence, Orahood, Green	On going	
CD. 6	Process book sale	<ol style="list-style-type: none"> <li>1. Maintain book sale table</li> <li>2. Replace with recent withdrawn books or duplication gifts</li> </ol>	Baugess (Jin did the work from September through December)	Ongoing	
CD. 7	Work on damaged books	<ol style="list-style-type: none"> <li>1. Send unrepairable materials to liaisons</li> <li>2. Bind, replace, or withdraw materials, or</li> <li>3. Send orders to the Acquisitions</li> </ol>	Laurence, Jin, and liaisons	Ongoing	
CD. 8	Work on billed, lost&paid, and missing books	<ol style="list-style-type: none"> <li>1. Receive billed, lost&amp;paid, and missing lists from Circulation when the replacement fund is available</li> <li>2. Distribute missing slips to liaisons</li> <li>3. Withdraw from CONSORT and OCLC</li> </ol>	Jin, Liaisons, Laurence, and Wiesner	This year's replacement money was spent	

		if liaisons suggest, or 4. Send replacement orders to the Acquisitions based on Liaisons' recommendations			
CD. 9	Delete Withdrawn records	1. Train students to delete item, bib (if needed) records, and OCLC holdings (if needed)	Jin	Done	
CD. 10	Collection Analyses for Space Use in Beeghly	1. Create data for last few years new books added to the Beeghly stacks 2. Review the current space use and analyze future direction by LC outlines 3. Make recommendation for Circulation arrangement of the space	Jin	12/31/07	
Ser. 1	Continue the Periodicals Usage Study	1. Train new T.S. students to work on periodical usage 2. Send head of Technical Services a quarterly usage report		Ongoing	
Ser.2	Binding journals in summer	1. Send journals from Beeghly, Science & Music to General Bookbinding 2. Process returned volumes and create item records 3. Shelf shift as necessary	Hoops; Baugess worked on this since February with assistance from Melicher	Ongoing	Processing every year
Ser.3	Serials Solutions - Union List of Serials	1. Work with Serials Solutions throughout the year for updates, changes, etc.	Hoops, Jin, Melicher	Ongoing	Ongoing
Ser.4	Olinks project	1. Meet with Joy and Paul to discuss plan for OWU (done) 2. Create Excel Spreadsheet for Thomas	Hoops, Melicher	Ongoing	Updated JSTOR Spreadsheet

		<p>Dowling with OWU JSTOR titles (done)</p> <ol style="list-style-type: none"> <li>3. Add Gender Watch and Ethnic Newswatch titles to spread sheet</li> <li>4. Add “other” e-journals to spread sheet using home-grown rules</li> <li>5. Maintain Olinks on ongoing basis (Hoops)</li> </ol>			sent 7/06
Ser.5	Develop plan for moving serials office downstairs	<ol style="list-style-type: none"> <li>1. Visit other libraries</li> <li>2. Literature search</li> <li>3. Catalog perusal</li> <li>4. Produce written plan</li> </ol>	Hoops with Jin	(On Hold)	
Ser.6	Complete the LHR batch load project	1. Make a plan to complete the LHR batch load project	Hoops	9/06	On hold from OCLC due to LHR MARC conversion
Ser.7	Financial Record Keeping	1. Provide updated monthly reports to Theresa, Xudong and Bonnie on Periodical spending	Hoops	Ongoing	
Ser. 8	Periodical Shelf Shift	<ol style="list-style-type: none"> <li>1. Move abstracts/indexes to 3<sup>rd</sup> floor. (Done)</li> <li>2. Shift current stacks in order to make room for titles returning from bindery</li> <li>3. Develop plan to integrate remaining science materials into existing periodical collection and create complete shift plan.</li> </ol>	Hoops	Ongoing	Periodicals are being shifted as needed to incorporate 3 <sup>rd</sup> floor titles as well as those returning from the bindery.
Ser.9	Retrospective cataloging for dead periodical titles	1. Determine what needs to be cataloged.	Hoops	Unknown	

		<ol style="list-style-type: none"> <li>2. Catalog appropriately</li> <li>3. Update Serials Solutions List</li> <li>4. Create LHR's</li> </ol>			
Ser.10	Re-set current periodical shelves after recently cancelled periodicals are pulled	<ol style="list-style-type: none"> <li>1. Pull cancelled periodicals</li> <li>2. Determine shelving scheme</li> <li>3. Set shelves</li> <li>4. Re-label stacks as needed</li> </ol>	Hoops	12/06	
Ser.11	Update LHR's for those titles cancelled in recent cancellation project	<ol style="list-style-type: none"> <li>1. Identify those titles needing maintenance. (Done)</li> <li>2. Update on OCLC Connexion web</li> </ol>	Hoops	5/06 Done	

**Completed Objectives:**

<b>Dept</b>	<b>Goals and Objectives</b>	<b>Strategies to Complete</b>	<b>Responsibility</b>	<b>Complete Date</b>	<b>Notes</b>
T.S. 11	Millennium Modules	<ol style="list-style-type: none"> <li>1. Continue to work on Cataloging, Acquisitions, and Serials modules</li> <li>2. Discuss and solve problems</li> <li>3. Share experience each other</li> </ol>	T.S. staff	Ongoing	

		4. Make new procedures			
T.S. 15 New	Hire a new Tech. Services and Government Documents Assistant	<ol style="list-style-type: none"> <li>1. Establish a search committee (done)</li> <li>2. Complete a search plan (done)</li> <li>3. Post ads (done)</li> <li>4. Review and select candidates for a campus interview (done)</li> <li>5. Make an offer (done)</li> </ol>	Jin, Gao, Laurence, Orahood, Scott	Done	
T.S. 17 New	Hire a part-time Serials Librarian	Hire the former Serials Librarian Vickie Melicher to work part-time until we hire a new Serials Librarian	Jin	Done	
Ser.11	Update holdings for science titles	<ol style="list-style-type: none"> <li>1. Determine what is held where</li> <li>2. Update holdings statements in Millennium</li> <li>3. Update Serials Solutions list</li> </ol>	Hoops	<b>Done</b>	