**Bethany College and Wheeling Jesuit University**
**Review of Technical Services**

**Summary**

To reduce costs and improve process efficiencies, the number of manual steps that staff perform when using system tools, paper, and handling items needs to be minimized. Recommendations include (1) purchasing materials through library vendors so as to leverage discounts, (2) taking advantage of offline processing options, such a producing labels that are offered free or at a nominal cost, and (3) implementing automated offline cataloging processes such as OCLC's PromptCat. By receiving full OCLC MARC records, professionals are relieved of copy cataloging tasks. As a result, they are able to perform more complex tasks, such as processing gift, archive, and digital collections; evaluating statistics and services; and creating reports.

PromptCat benefits
- OCLC MARC records arrive with your local data, and holdings already added.
- Offline automated processes eliminate the need to search, export, and confirm record is a correct match.
- Records sometimes arrive before materials do.
- More than 20 material vendors partner with OCLC to offer the service.

Consult your regional service provider, who could conduct a feasibility and cost analysis for incorporating PromptCat service into your workflow.

Streamline the efficiency of ordering processes by utilizing existing acquisitions tools or system modules. Although current WJU accounting processes require some tracking of materials with paper, replace shelf list cards, ledgers, and writing on inside covers of books with notes, for example, recording the OCLC record number. According to National Center for Education Statistics (NCES), 100 percent of the libraries in West Virginia have reported that they are automated. This reinforces the assumption that shelf list and associated cards are unnecessary. Although the number of academic institutions that still maintain shelf lists is uncertain, all WV academic libraries reported that they provide an electronic catalog that includes the library's holdings on campus [Table 12A, p 43]. The data are reported by NCES, which collects information biennially from about 3,700 postsecondary institutions (Carey, Nancy, Natalie M. Justh, Jeffrey W. Williams. (2003). U.S. Department of Education, National Center for Education Statistics. Academic Libraries: 2000. 2004-317. NCES: Washington, D.C.)

Track the receipt and status of orders online by using a centralized tool such as SIRSI's Workflow. The training manuals provide exercises to help staff become familiar with the numerous features and tools.

Reduce the amount of time that it takes for materials to be processed by applying jacket covers only to materials that are frequently circulated. A study comparing electronic and print book usage at Louisiana State University found that only 30 percent of print and 20 percent of electronic books were used. The circulation of both formats followed the academic year. University press e-books

garnered a smaller share of accesses relative to title count than did those of commercial publishers. The most popular subjects in both formats were library science, literature, economics, education, sociology, political science, medicine, and mathematics. Popular e-book–only titles were biology and technology; popular print–only were philosophy and American history. (Christianson, Marilyn, and Marsha Aucoin. 2005. Electronic or Print Books: Which Are Used? *Library Collections, Acquisitions and Technical Services*. 29(March): 71-81)

*(Consultant recommended including circ data. The following was added by WJU. A Sirsi report of WJU's past 12 month circulation revealed that the Library of Congress classes B, D, H, and P comprised 68% of circulation with other categories having few circulations. These would be the areas of philosophy, psychology, religion, history, social sciences, and language and literature. Sirsi title use report detailing number of transactions on the B category for the past 12 months revealed the following circulation: 6 uses on 1 item, 4 uses on 3 items, 3 uses on 11 items, 2 uses on 87 items, and 1 use on 925 items. Sirsi itemlist report showed fewer than 1% of titles (1,489) have circulated more than 10 times since automation in 1996.)*

Eliminate tracking of bibliographic data on inside of books and pieces of paper by inputting information in the SIRSI system. The cataloger can delete temporary information during the quality control check. To ensure quality control, catalogers need to complete final check and verify correctness of call numbers, complete record is in SIRSI system and that processing and labels are correct. Eliminate manually compiling statistics by utilizing the variety of statistical reports that SIRSI generates, including group reports, and a list of line items that can be e-mailed to faculty.

The following chart illustrates institutional resources and technical services practices and processes for Wheeling Jesuit University and Bethany College. The chart is an attempt to quickly communicate recommended processes, gaps, and opportunities to improve efficiency by utilizing automating tools that may help
- reduce the number of times an item is handled more than once;
- reduce the number of online copy cataloging processes;
- reduce the number and types of tasks associated with processing;
- decrease the amount of time needed to generate statistical reports; and
- increase the number of items processed in backlogs.

As a result of this workflow analysis, the following modifications in the processes are recommended:
- Entries displayed in PINK represent processes identified as opportunities.
- Entries displayed in RED represent processes could be eliminated
- Entries in GREEN represent processes that could be modified to improve efficiency

| Wheeling Jesuit University | | | Bethany College | |
|---|---|---|---|---|
| **Staff** | | | **Staff** | |
| **87 FTE** | | Faculty | **60** | |
| Yes | | Full time cataloger also performs other duties | Yes | |
| Yes | | Full time acquisitions staff | No (Director performs tasks) | |
| No | | Technical services staff assistants | Yes, two part-time | |
| Yes, intermittent | | Student workers | Yes, three days a week | |
| Yes, two | | Circulation staff | Student workers rotating shifts | |
| No | | Archivist | Yes | |
| **Special projects** | | | **Special projects** | |
| No | | Butterfly garden, art collection, children's corner, Pulitzer prize collection, light reading collection | Yes | |
| Yes | | Book sale weekly | No | |
| No | | Book sale annually | Yes | |
| **Materials** | | | **Materials** | |
| *153,590* | | Number of volumes | 122,107 | |
| Yes *Will continue to use Amazon for certain items* | | Purchases most orders from Amazon.com | No | |
| No | | Purchases most orders from Library material vendors | Yes | |
| $48,600 | | Purchasing budget | $64,000 | |
| >2,000 | | Number of Archive materials | *>225,000+* | |

| | | | | |
|---|---|---|---|---|
| *Few* | | **Archive materials cataloged** | *Yes* | |
| Yes, small | | **Children's collection** | Yes, extensive | |
| Approximately >1 % | | **Percent of collection AV materials** | Approximately >4% | |
| Yes, from consortia | | **E-book collection** | Yes, from consortia | |
| Yes | | **Duplicates CDs that accompany monographs** | No<br><br>***Will start*** | |
| ***Yes*** | | **Standing orders** | By series type: NY Times best sellers, Newberry, Caldecott, American Library series | |
| No<br>*We have gifts and donations but not extremely large* | | **Large Gifts/donations** | Yes | |
| No | | **Digitized collections** | ***In process*** | |
| **Budget** | | | **Budget** | |
| $48,600 | | **Materials** | $64,000 | |
| No | | **Book endowment** | Yes | |
| **System tools** | | | **System tools** | |
| Yes | | **SIRSI** | Yes | |
| Yes | | **Uses SIRSI Acquisition module-WorkFlows** | No | |
| *Yes but it is not the cataloger's job duty* | | **Uses Serials Solution** | Yes | |
| Yes | | **Collection completely barcoded** | No | |
| **No**<br><br>***Will begin a trial period and evaluate promptcat*** | **Material vendors offer discounts and order OCLC MARC records via PromptCat** | **Orders most materials from library material vendor** | **Yes** | |

| | | | | |
|---|---|---|---|---|
| No | | **Faculty selects titles from Books in Print BIP** | Yes | |
| Yes *sometimes* | | **Faculty selects titles from Amazon** | Minimal | |
| Yes | | **Faculty selects titles from Journals** | Yes | |
| Yes *Faculty submit orders as they wish* | **Faculty submit order requests via Acquisition module** | **Faculty either completes print order card or sends email to acquisitions clerk** | | |
| No | | **Faculty send email to Library Director** | Yes | |
| Yes | | **Acquisition clerk places orders** | No | |
| No | | **Director places order** | Yes | |
| **Gifts/donations** | | | **Gifts/donations** | |
| No | | **Bibliography created first** | Yes | **Send donor letter of acknowledgement** |
| Yes | | **Assistant staff searches SIRSI before *librarian* decides to retain gift** | Yes | |
| Yes | | **Acquisition clerk searches and exports MARC record from OCLC to create on order record in SIRSI** | No | |
| No *Cataloger double checks that record is correct, updates and edits in Sirsi* | | **When item arrives cataloger searches and exports record from OCLC and imports into SIRSI** | Yes | |
| Yes | | **Add holdings to OCLC** | Yes | |
| **Retrieve PromptCat file and export OCLC records which already includes local data, and import into system. Holdings are already added.** | | | | |
| Yes | | **Student workers process materials** | Yes | |
| Yes *Will continue to* | | **Apply jacket covers to all materials** | No | |

| | | | | |
|---|---|---|---|---|
| *cover all* | | | | |
| No | | **Apply reinforcement tape to materials** | Yes | |
| Yes | | **Circulation handles reserves** | No | |
| Yes<br>*shelflist has been closed* | **Track orders online through SIRSI Workflow** | **Shelflist maintained** | No | |
| Library of Congress | | **Classification** | Dewey Decimal | |
| Yes, *but uses sirsi validate* | | **Accepts authority control in record as is** | ***Not always*** | |
| Yes | | **E-book MARC records loaded into SIRSI** | ***In process*** | |
| ***Occasional*** | | **Library assistants enter brief on order records** | ***No*** | |
| Yes | | **Shelf space constraints** | Yes | |
| Yes<br>*Change from 4 times to 1 time* | *and we changed the stamp* | **Stamp reference book with "Reference" stamp** | No | |
| *Yes, assistant will continue to double-check what cataloger enters as call number and some record data. Cataloger will spot check only.* | | **Assistant performs quality control (call number, data)** | ***No*** | |
| ***No*** | | **Assistant creates call number label** | Yes | |
| Yes<br>*Will continue to manually track discards but will develop sirsi report to track titles, volumes, added* | SIRSI compiles statistical reports | **Manually compiles statistical reports** | No, *uses Sirsi reports* | |

**NOTICE: Christina at WJU edited this consultant report including making changes and deletions for clarification. Changes are italicized.**