

# Telling Our Story: Creating a Departmental Annual Report

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Katy Mathews, MLIS, PhD

Patrick Koga

Ohio University Libraries

# Goals

- Formalize a guiding departmental mission statement
- Demonstrate the value provided by the department
- Highlight accomplishments
- Provide a convenient vehicle for commonly-requested statistics
- Serve as a positive example of transparency for other departments

# Mission Statement

The Collections Assessment & Access Department facilitates the physical circulation, management, and assessment of print collections for Ohio University. Through these functions, we support the Ohio University Libraries' mission to connect learners to information for discovery, intellectual growth, and advancement of knowledge. Paramount in supporting the Libraries' mission is our commitment to: timely, equitable access; efficient, courteous service; and responsible management of resources.



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### George Cheripko

George manages the Patron-Initiated Circulation (PCIRC) function of OhioLINK and the campus-wide Faculty/Staff Delivery Service. He also serves as a Family Head of the Inter-Campus Services OhioLINK committee. George participated in the Ohio University Libraries' First Draft event in the 2017-2018 academic year. He also served on the Joint Police Advisory Committee for the university.



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### Joyce Douglas

Joyce leads our Stacks Management efforts, managing student employees who shelve, shift, and maintain the general, government document, and film collections. Joyce was active with many university and library committees including the Library Research Expo Planning Committee, University Veterans Committee, Library Council, and the In-House Conference Planning Committee.



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### Chasity Gragg

Chasity works with circulation functions including assisting with patron account issues. She also supports Alden Library's service desk and assists faculty with film bookings. She has participated in many Libraries initiatives including the web team, ILS Committee, Library Council, Public Service Idea Sharing Team, and the First Draft Event.

### Patrick Koga

Patrick Koga works with collections assessment and management projects. He creates data analysis and visualization to support collection management. He also manages collections projects. Patrick helps provide programming for Finals by Alden Events.



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### Katy Mathuews

Katy serves as the Head of Collections Assessment & Access. She works to coordinate the functions of circulation, consortial collection sharing, stacks management, and collections assessment. In the 2017/2018 academic year, she served on many Libraries initiatives including the Safety & Security Committee, the Finals Week Programming Committee, and served as chair of the Faculty Status Steering Committee. Her statewide service includes serving on OhioLINK's Inter-Campus Services Committee, as a Library Leadership Ohio Applicant Reviewer, and as the Membership Chair of the Academic Library Association of Ohio. Katy actively publishes and presents on academic library and higher education topics. Most notably, in 2017 Katy was co-author on two papers presented at the International Federation of Library Association's World Library and Information Congress in 2017 in Gdansk and Wroclaw, Poland.



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### Macie Penrod

Macie works to support Patron-Initiated Circulation (PCIRC) and circulation functions. She also supports Alden Library's Service Desk. Macie has served on the ArticlesPlus Working Group and the Public Services Idea Sharing Team.



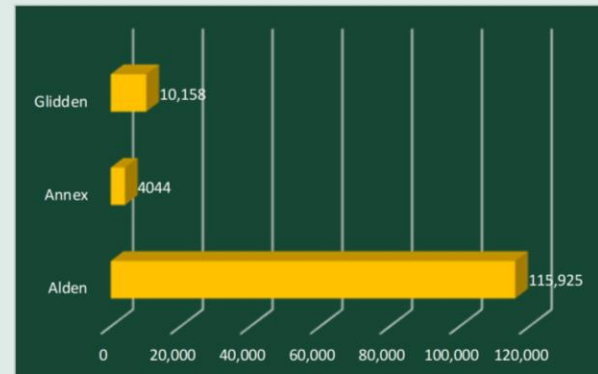
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## Circulation

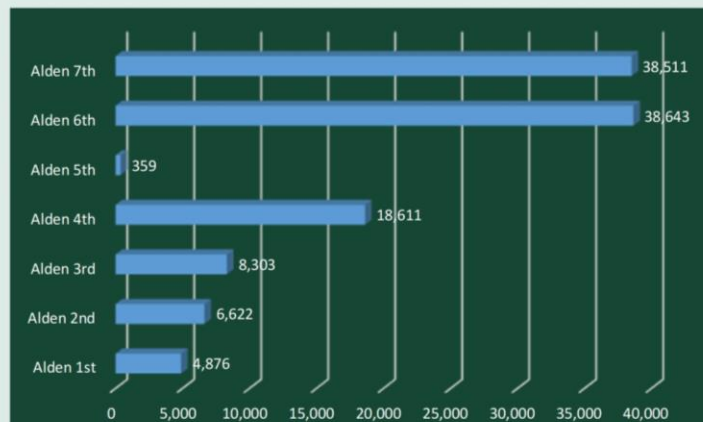
All circulation data pulled from Sierra using Web Management Reports tool. New title count provided by metadata services. Checkout numbers include renewals.

	Check-Ins	Checkouts	Holds	Recall
Alden	66,507	115,925	9,934	30
Annex	2,217	4,044	954	0
Music/Dance	8,166	10,158	258	2

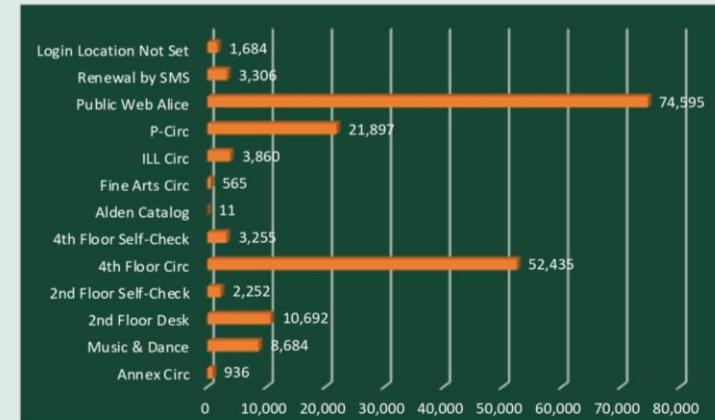
### Number of checkouts



### Checkouts based on item location

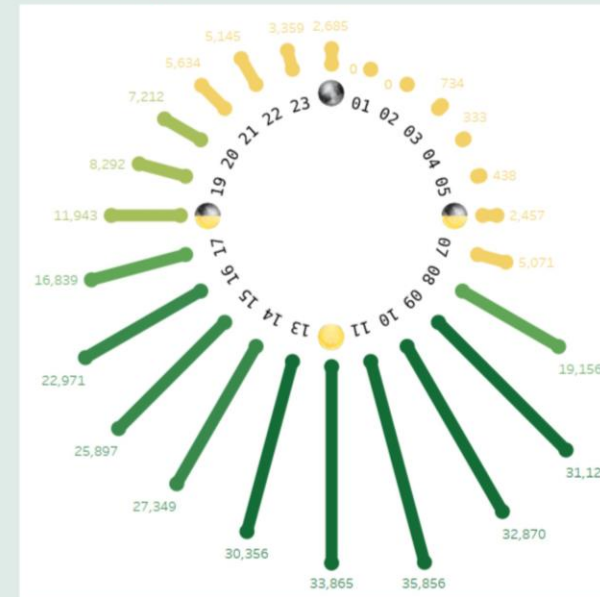


## Checkouts by Location of Transaction



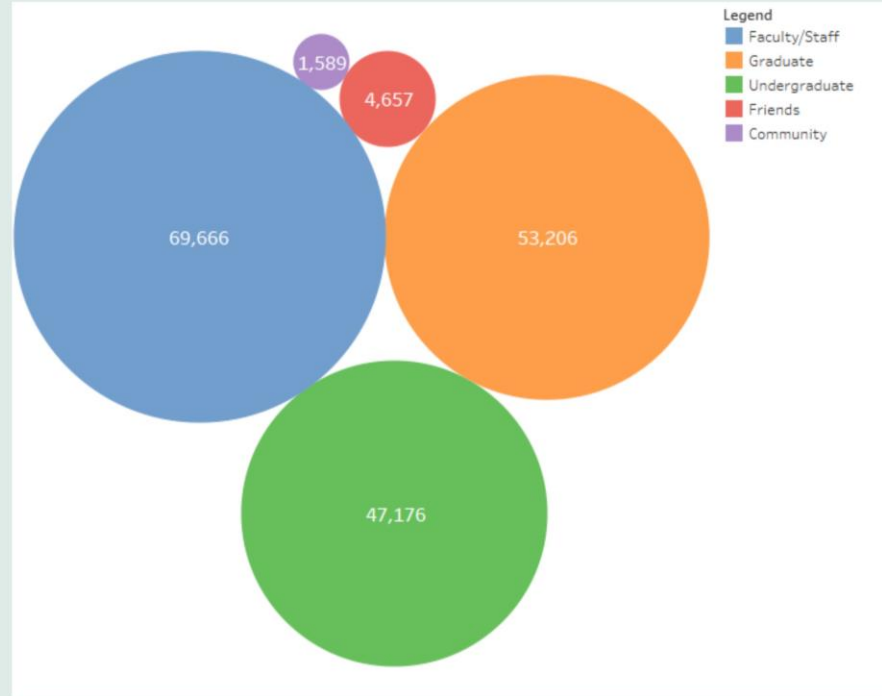
\*Checkout numbers include renewals. "Public Web Alice" and "Renewal by SMS" are renewal numbers since checkouts occur within the building

## Transactions by Hour



Includes check-in, checkout, holds, and recalls

### Checkout by Patron Type



### Projects

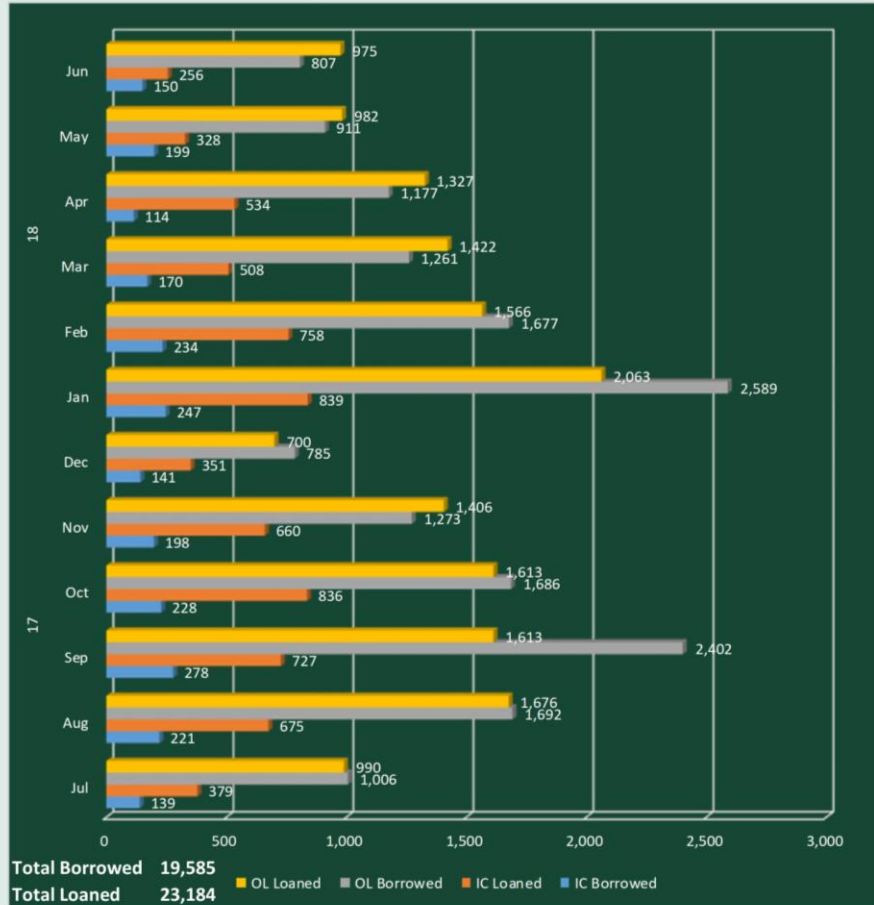
- Collaborated with Metadata Services, the Registrar's office, and OIT to create a new patron type for Honor's Tutorial College and Cutler Scholars patrons, including an automation process for patron load files.
- Streamlined borrowing limits by patron type for ease of access
- Provided on-going training for Public Services staff.
- Completed an inventory of the film collection





## Patron-Initiated Circulation (PCIRC)

## Items Borrowed &amp; Loaned



Monthly breakdown of OhioLINK & Inter-Campus items requested and borrowed by Ohio University Alden Library Patrons. Our Inter-Campus branches are Chillicothe, Eastern, Lancaster, Southern, and Zanesville.

\* IC—Inter-campus items sent between branch campuses

\* OL—OhioLINK items sent between other OhioLINK institutions

		Gen. Coll. A-L Loaned	Gen. Coll. P-Z Loaned	CIC Loaned	Media Loaned	Fine Arts Loaned	Gov. Doc. Loaned	Leisure Loaned	Total Loaned
17	Jul	432	362	66	0	104	9	17	990
	Aug	752	657	59	11	161	6	30	1676
	Sep	686	642	93	17	151	6	18	1613
	Oct	715	589	109	1	179	7	13	1613
	Nov	615	547	96	0	129	10	9	1406
	Dec	271	308	42	1	66	7	5	700
18	Jan	930	865	70	2	173	4	19	2063
	Feb	729	540	91	3	180	8	15	1566
	Mar	571	563	81	1	181	6	19	1422
	Apr	549	530	67	3	155	11	12	1327
	May	457	414	32	2	71	1	5	982
	Jun	376	425	49	6	98	0	21	975
Grand Total		16,333							

## OhioLINK Items Fulfilled

Monthly number of OhioLINK requests pulled and sent to other institutions. Sorted by floor/collection items are requested. Total Loaned count can be found at the top right of the "Borrowed & Loaned Count."

		Gen. Coll. A-L Loaned	Gen. Coll. P-Z Loaned	CIC Loaned	Media Loaned	Fine Arts Loaned	Gov. Doc. Loaned	Leisure Loaned	Total Loaned
17	Jul	140	137	12	74	11	3	2	379
	Aug	292	265	11	75	25	1	6	675
	Sep	329	258	16	96	18	4	6	727
	Oct	368	309	30	77	40	8	4	836
	Nov	285	247	33	55	33	4	3	660
	Dec	130	158	9	36	13	2	3	351
18	Jan	333	362	27	67	40	1	9	839
	Feb	331	286	22	67	42	3	7	758
	Mar	195	214	16	56	24	1	2	508
	Apr	191	223	6	45	68	1	0	534
	May	141	143	2	29	11	2	0	328
	Jun	102	93	7	26	23	3	2	256
Grand Total		6,851							

## Inter-Campus Fulfilled

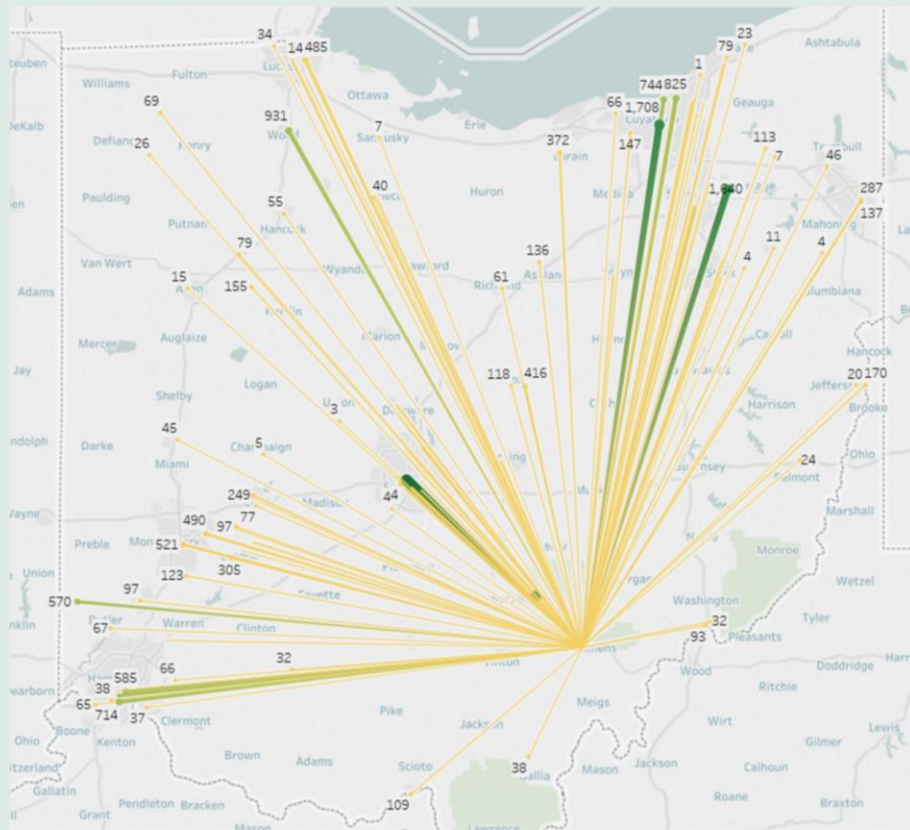
Monthly number of Inter-Campus request from OU branch campuses. Sorted by floor/collection items are requested. Total Loaned count can be found at the top right of the "Borrowed & Loaned Count."

## Request by Alden Patrons

Monthly number of Inter-Campus requests that are placed by our patrons. These items are included in the count for "Inter-Campus Fulfilled." Items are requested to be picked up at the circulation desk or be sent via Faculty/Staff Delivery.

		Circulation	F/S Delivery
17	Jul	248	100
	Aug	438	160
	Sep	486	125
	Oct	434	133
	Nov	434	133
	Dec	210	116
18	Jan	541	177
	Feb	464	142
	Mar	357	92
	Apr	380	120
	May	163	137
	Jun	134	76
Total		4289	1511

## OhioLINK &amp; Intercampus Loan Destinations



Map showing the locations our items are being sent across Ohio.

## Projects

In partnership with Mail Services, implemented Intra, an electronic logistics platform, to track Faculty & Staff Delivery Service deliveries.

## Faculty Staff Delivery

Bentley	1685	Yamada	50
Ellis	688	Hudson	38
31 S Court	356	Copeland	34
Schoonover	297	Porter	29
Gordy	289	Jennings	19
McCrahen	271	Putnam	15
Glidden	256	Trisolini	15
Ridges	216	Living Learning Center	13
Seigfred	206	Hanning	12
Clippinger	199	Westside	8
HR	181	Scott Quad	6
Kantner	130	University Garage	6
Stocker	97	35 Park Place	5
Grover	93	RTEC	5
Irvine	93	Cutler	4
Morton	88	Parks	4
Baker	81	Wilson	2
HDL/Wusoc	61	Brown	0
Grovesnor	60	McGuffy	0
Chubb	57	Walter	0
<b>Grand Total</b>		<b>5,669</b>	

## F/S Delivery Loans

The table on the left shows items that are sent to an Ohio University Athens campus building. Sorted by greatest to smallest quantity.

The tables on the right show monthly sums for delivered items and returned items.

2017	Jul	461
	Aug	485
	Sep	476
	Oct	457
	Nov	355
	Dec	377
2018	Jan	700
	Feb	508
	Mar	456
	Apr	425
	May	532
	Jun	440
<b>Grand Total</b>		<b>5,672</b>

## F/S Delivery Returns

2017	Jul	174
	Aug	361
	Sep	249
	Oct	321
	Nov	327
	Dec	406
2018	Jan	444
	Feb	341
	Mar	319
	Apr	770
	May	567
	Jun	416
<b>Grand Total</b>		<b>4,695</b>





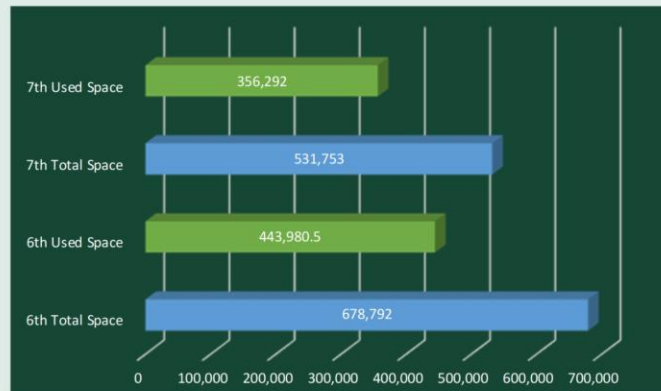
## Collections Assessment & Stacks Management

### Number of Items Shelved

To get an idea of how many items have been shelved in the general collection we combined the number of new titles added to the collection and the number of items checked in. To get the number of new titles we limited items in the general collection by item creation date.

Number of new items: 15,652  
 Number of check-ins: 66,507  
**Total items shelved: 82,159**

### Shelf Space in Use



The above graph shows the number of linear inches of shelf space occupied by collection materials. Given the measurements above, 66% of available shelf space is occupied by collection materials.

## Collections Assessment & Stacks Management

### Projects

#### Completed

##### Government Documents Microform Shifting Project:

- Government Documents microform was relocated
- The relocation project required extensive shifting and reorganization

##### Bedbug Response:

- Staff processed 3399 items from 4 different areas of the general collection
- All items were removed from shelves and placed into sealed plastic bags
- Heat treatment was applied to all items
- All items were re-shelved

##### Center for International Collections Project:

-The CIC collection required shifting after a significant amount of books were damaged and to accommodate new items that were being stored inaccessibly due to inadequate shelf space in required areas.

- The Center for International Collections has almost 45000 items and almost every item was touched for this shifting project
- Length of time: 1-2 months with 3 student employees

##### Children's Collection Shifting Project

- 671 new titles added during this fiscal year requiring shifting in the collection

##### I-19 Folded Maps:

- Created a list of all I-19 maps
- Checked for electronic overlap
- Sent list to fedgovdocs listserv for 30 days before withdrawal

##### Assisted with AssureVault Transfer:

- About 3045 items from the general collection and CIC collection were identified and pulled for off site storage
- Used 6th floor swing space as temporary storage
- Boxed all items for shipment
- 205 boxes total

#### In Process

##### Magazine & Newspaper Microfilm Duplication Project:

- Compare microfilm and electronic overlap
- About 1200 magazine titles
- About 660 newspaper titles

##### Electronic Resource Duplication Project

- Examining newly-purchased electronic resources for microform duplication

## Presentations

- ◆ Douglas, J., Koga, P., & Mathuews, K. (2018). The Big Shift: Planning, Managing, and Muscling Major Shifting Projects. Ohio University Libraries In-House Conference, Athens, OH, May 31, 2018.
- ◆ Mathuews, K., & Lewis, Z. (2018). Empowering Partnerships: Sustaining Support from High School to Academic Libraries. Ohio University Libraries In-House Conference, Athens, OH, May 31, 2018.
- ◆ Mathuews, K., & Lewis, Z. (2018). Impactful Partnerships: Outreach and Recruitment in the Academic Library. Southwestern Ohio Council for Higher Education (SOCHE) Library Conference, Our Futures in Times of Change: The academic library in the 21st century, West Chester, OH, May 18, 2018.
- ◆ Mathuews, K., & Lewis, Z. (2018). Mind the Gap! Sustaining Support from High School to Academic Libraries. Michigan Academic Library Association Annual Conference, East Lansing, MI, May 16-18, 2018.
- ◆ Wochna, L. & Gragg, C. (2018). Welcome to Alden Library: We're Here for You. Presented at: Ohio University Classified Senate Meeting, Athens, OH, January 18, 2018.
- ◆ Mathuews, K., & Lewis, Z. (2017). Empowering Partnerships: Exploring the School Library Environment to Promote College Student Success. Academic Library Association of Ohio Annual Conference, October 27, 2017.
- ◆ Mathuews, K., & Lewis, Z. (2017). Connecting the High School Library & Post-Secondary Library Experience: Empowering Students for Success. Ohio Educational Library Media Association Annual Conference, Columbus, OH, October 18-20, 2017.
- ◆ Mathuews, K., Mackinder, L., & Hulm, J. (2017). Investing in Open Access: Identifying, Evaluating, and Supporting Open Access Resources. Paper presented at: International Federation of Library Associations World Library and Information Congress 2017—Wrocław, Poland—Libraries. Solidarity. Society. In Session S12—Satellite Meeting: Serials and Other Continuing Resources Section and Acquisition and Collection Development. In: Open Access: Action Required, 16-17 August 2017, Gdańsk, Poland.
- ◆ Nelson, M., Mathuews, K., Intrator, M., & DeBorde, D. (2017). Leveraging Preservation Practices during Large Scale Relocation and De-duplication. Paper presented at: International Federation of Library Associations World Library and Information Congress 2017—Wrocław, Poland—Libraries. Solidarity. Society. In Session 170—Preservation and Conservation with Rare Books and Special Collections. August 19-25, 2017.

## Publications

- ◆ Harper, D., Mathuews, K., Pulcini, B., & Tackett, K. (2017). The role of the university president: An examination of contemporary narratives in higher education. *Journal of Higher Education Management*, 32 (1).
- ◆ Mathuews, K. & Pulcini, B. (2017). Maintaining the access mission: Open access universities and the challenges of performance-based funding. *College & University Journal*, 92(3).
- ◆ Mathuews, K., Mackinder, L., & Hulm, J. (2017). Investing in open access: Identifying, evaluating, and supporting open access resources, IFLA WLIC 2017 Libraries. Solidarity. Society. Satellite Meeting: Open Access: Action Required, Gdańsk, Poland, August 16-17, 2017. IFLA Library. Retrieved from <http://library.ifla.org/1867/1/S12-2017-mathuews-en.pdf>
- ◆ Nelson, M., Mathuews, K., Intrator, M., & DeBorde, D. (2017). Leveraging preservation practices during large scale relocation and de-duplication. IFLA WLIC 2017 Libraries. Solidarity. Society. Session 170 - Preservation and Conservation with Rare Books and Special Collections, Wrocław, Poland, August 19-25 2017. IFLA Library. Retrieved from <http://library.ifla.org/1838/1/170-nelson-en.pdf>



# Lessons Learned

- **Successes**

- Quick reference for data requests
- Promotes culture of reporting and transparency
- Helps demonstrate our value

- **Challenges**

- Anticipating what might be useful to others
- Manual statistics work
- Compiling number-heavy data into an easy-to-consume format

# Future Plans

- Continue to produce and improve annual reports
- Revise to fit developing needs
- Provide our report to new Dean





# Thank You

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