SUBJECT LIAISON'S GUIDE TO THE BACKROOM
What every new liaison needs to know about technical services processes

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Tim = Department Head: Technical Services
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Hunter Library uses the liaison model; liaison primary responsibilities = reference, instruction, and subject-specific collection development

Recurring issues related to lack of in-depth understanding of processes and procedures related to acquisitions
Collection development often an elective in degree programs; usually focuses on philosophical issues rather than technical processes.

Even when experienced in other libraries, many new liaisons without practical experience in the technical aspects.

Details of processes are institution-specific

Prioritization of training new liaisons focuses on traditional areas

- Increases effectiveness
- Speedier
- More efficient
- Creates informed liaisons
- Sets expectations
Budget & Fund Structure

Submitting Orders to Acquisitions

Acquisitions Ordering Process

Processes & Procedures for Received Materials
Strategic Planning for cuts, changes, additions to budget, and resource needs

Speaking the same language
Explaining in terms understood by all

Context
Framing requests, questions in appropriate budgetary context
Budget & Fund Structure

**How Much?** Collections budget, liaison budget?

**Who?** Individual, departments, committees?

**How?** Allocation models, historical precedent?

**Updates?** How often issued, details included?

**Dates?** Allocations, revisions, rollovers, cutoff?

**Sources?** Main sources, EOY, one-time, grants

15% 75%
SUBMITTING ORDERS

Processes?
Format, mediation, default settings, approval plans, DDA

Information?
Publication info, codes, justification (especially continuing funds), platform

Special or unusual situations
Standing orders, unusual formats, replacement copies

Timing?
Deadlines, rush orders, rollovers

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Acquisitions Ordering Process

When and how?
Submissions weekly, daily?
Average turn-around time?
Process for submission?
Special information or processes needed for certain resource types?

Updates?
Status, delays.
Notification routines.

Problems?
Out of print, out of stock, invalid format, price problems, duplicates.
Decision-making processes.
RECEIVED MATERIALS:
PROCESSING & CATALOGING

Sort, stamp, bug
Collection selection
Set-up

PROCESSING
Who does what/how often?
Different processes by type.
Location(s)?
Cataloging

Who and what?
Regular/specialty/automated

How long?
Normal/Rush/Special Cases

Records Customization

Location and routing

Notifications

RECEIVED MATERIALS:
PROCESSING & CATALOGING

A - Z List
090 vs 050
Table of Contents
Subject Headings
I wish I knew

Liaison Notes

WISHLIST

I wish I’d had more conversations with collection development and acquisitions about known ‘problem’ publishers.

I’m still getting the feel of what is appropriate to ask for, like how many items per semester is it reasonable to ask for as a rush?

I was surprised by the number of people involved in the processes.

Timing for acquisition of new serials can be very confusing since there can be a long time between request, approval, and access.

I’m still working on understanding the default settings for ordering and when/how exceptions are made.

Wish I'd asked more about how often things were updated in our ILS at the end of the year.

What is the chain of command? Who notifies me for any given issue?