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Making de-prioritized gifts/donations/inventory discoverable for researchers

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Abstract

A project to oversee the quality control and brief description of 21,000+ rare and unique donated items in an unprocessed “backlog” spanning decades and a system migration from Sierra to Alma.

Gathering data throughout this project allows us to develop benchmarks for future projects and large donation processing for rare and unique material – a consistently de-prioritized area of the cataloguing unit’s workload.

Institutional Context

University of Western Ontario (Western U):

- ✓ 42,000 full-time equivalent students
- ✓ 8 library service locations; 6 library departments
- ✓ 49 librarians and archivists; 46 library assistants; 90 student library assistants
- ✓ \$15.7 million acquisitions budget
- ✓ 2.4 million print materials; 2.3 million electronic materials

Discovery, Description & Metadata unit:

- ✓ 11 staff, 4 librarians, 6 metadata specialists, 1 electronic resource management specialist
- ✓ Unit has moved twice in less than 5 years
- ✓ In late 2019, moved from Innovative Interfaces’ Sierra to Ex Libris’ Alma
- ✓ Metadata cleanup projects have been ongoing since migration.

MAKING DE-PRIORITIZED GIFTS/DONATIONS/INVENTORY DISCOVERABLE FOR RESEARCHERS



Western
Libraries

Alie Visser and Christina Zoricic

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Literature Review

- Causes of backlogs: limited staff, technology (pre-OPACs and system migrations), limits on staff expertise (subject areas, languages), training, and workflows.
- *Beginning a project:* Develop a project plan and have regular cross departmental progress meetings
- Share training and other documentation.
- *Collections strategies:* Cost benefit analysis: Is the added value of the gift/donation equal to the staff labour and storage costs?
- The importance of a donation policy that is thoughtfully observed.
- *User story:* Difference between copy and full cataloguing for user discovery and access – is a minimal record better than no record at all?

Why This Project? Why now?

- Need a clear understanding of backlog work to illustrate its value and make requests for resources
- A combination of a migration from Sierra to Alma, a botched OCLC data sync, a global pandemic, and an undocumented “reorganizing” of physical material left the backlog in a confusing, and jumbled mess.



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Breakdown of Unprocessed Items

Location	Number of Items	% of items in backlog not visible in Public Display
Archives	6797	41.91%
Various(LPs) - unknown	3500	21.58%
Business	1	0.01%
Law	1	0.01%
Music/CBO	4722	29.11%
Taylor	14	0.09%
Weldon	1144	7.05%
Various locations	40	0.25%

What We Learned

- Gift backlog management requires regular time, and effort for the processing teams involved. It is important to consider prioritization of backlog donation collections in discussion with key constituents
- Duplicates accrue over time. Without appropriate inventory control from the beginning, it is possible that we purchase what has already been gifted to us.
- Make sure your collection is properly stored! Years of poor climate control and moisture left books to mould in their boxes.
- Gift backlogs need special attention when migrating systems!
- Issues related to where the location of physical items in Alma are recorded
- Not all migrated records had the appropriate donation statement, which had to be added in batch later
- Legacy data from 12+ years contained location codes that have changed over time (either moved or removed). Some material had to be reassessed (partnerships with Collections/Archives)
- System barriers: no automated way to change the status of an item in the task list: added to the Alma Idea Exchange
- Uncovered larger issues related to internal processes for location code rules and loan requests.

Project Goals

- Perform a quality control, review, accounting, and assessment of our backlog of gifts/donations
- Assign a receiving library and processing type to all items in backlog
- Move items into the cataloguing task flow
- Relocate all gifts/donations that need processing to CMDA location
- Free up storage space for incoming items
- Benchmarks for determining staffing resources when processing gifts/donations (i.e., X hours per book/score times 100 scores = x # of staff hours to process)
- Tool for assessing the staffing requirements when accepting a donation.

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Items by the Numbers

