

## **Regional Library Facilities/Campus Storage Operations: Project Preparation Guidelines**

The following procedures were developed from the recommendations of the CMI Operations Advisory Committee subgroups for Publicity, Usage, Bibliographic Control, and ILL/Document Delivery. The purpose of these procedures is to provide general guidance *during the preparation phase* of the project for the Regional Library Facilities and the campus storage operational units.

### **Processing Study Volumes to Distinguish Them from other RLF Collection**

CMI Study volumes will be stored separately from other stored materials so they can be easily identified and retrieved if requested.

NRLF and SRLF staff will physically mark the print journal runs of experimental titles for statistics keeping and survey distribution unless the depositing campus has already marked the volumes. Customized removable labels will be placed on the front cover and/or the spines of bound volumes. The labels will be supplied by CMI staff.

Unbound journal issues will not be relocated to the RLF's but will receive special handling by the campus library as part of the project.

### **Bibliographic Record Changes**

Campuses will change bibliographic holdings records for journal volumes/issues going to storage in their local catalogs. In order to change holdings information in Melvyl, campuses will do 'only what is necessary' in their local catalogs to store the print runs of experimental titles and to upload that information to Melvyl. The Bibliographic Control subgroup also noted that

- SRLF will identify CMI titles in ORION 2 so that use statistics can be extracted from local system.
- NRLF will not rely on any information from Melvyl or GLADIS to handle experimental titles.

The final spreadsheet of paired experimental and control titles will be the authoritative record of journal titles chosen for the study and will be available on the CMI website for consultation (<http://www.ucop.edu/cmi>)

### **Gathering Usage Data**

A copy of each request for a CMI journal issue, volume or copy of an article will be printed and kept by the lending unit (RLF or ILL unit or appropriate

unit). NRLF would keep manual records; SRLF will be able to gather statistics from local online systems.

**User Behavior/Preference data, i.e., gathering information from users who request CMI print journals from storage**

Survey forms will be used to gather documentation regarding the reasons why print experimental volumes were requested when an electronic version was available.

The lending unit (RLF's or local storage staff) will enclose a survey form in the volume or with the photocopy/FAX. Staff at the pickup point will ask the patron to fill out the survey form and return it. A follow-up email will be used to encourage users to complete the survey form.

Completed survey forms will be matched with the copy of the request for the print journal (retained by the RLF's or local storage staff) of the original request for the experimental title that has been retained by the ILL/Document Delivery Unit.

**Documenting Costs**

A work form is being prepared to use to document your staff costs for processing, marking, bibliographic control, and transfer of experimental volumes to storage.