

Texas State University-San Marcos  
Library Operating Letter (OL)

Title:     **Annual Serials Review Process**                    **LB/OL No 06.06**

Department of Origin:    Acquisitions

Date of Origination:     June 14, 1988

Date Last Revised:       December 18, 2008

I.     PURPOSE

1.01     The purpose of this OL is to indicate the manner in which the annual serials review process is conducted by the University Library.

1.02     Specific objectives of this OL are:

    A.    To set forth the rationale for the serials review.

    B.    To outline the various steps of the review process.

    C.    To set up an annual timetable for the various steps of the review.

1.03     This activity is performed in order to ensure the relevance of the serials collection to the curriculum of each department. It is also intended to facilitate changes needed to remain within the fiscal limits of the library acquisitions budget.

1.04     This process is conducted at the time of year when the majority of faculty members are on campus. It is also scheduled in order to provide sufficient lead time to inform vendors of the cancellations, a process which begins in June.

## II. POLICY AND/OR PROCEDURE

- 2.01 In January, the Serials Acquisitions Librarian will generate a list of active subscriptions and standing orders charged to each department.
- 2.02 Also in January, the Head Acquisitions Librarian and the Serials Acquisitions Librarian will compare each academic and library department's annual serials costs with its total allocation for library materials. Any department whose annual serials costs exceed their allocation will be notified that one or more cancellations will be required. The Serials Acquisitions Librarian may make suggestions to departments when savings can be achieved by dropping duplicating formats or low-usage subscriptions.
- 2.03 On or near January 31st, letters will be sent to each academic department's chair, with a copy to its library representative, dean, and subject librarian, asking that the department's ongoing serial orders be reviewed for possible cancellation. Accompanying the letter will be the department's list of active serials. The Assistant Vice-President, University Library may elect to meet with department chairs in order to discuss required cancellations when the serials costs exceed the allocation. The Head Reference Librarian and the Head Acquisitions Librarian will review titles charged to the Library Reference and Library General allocations.
- 2.04 On or near March 15th, all initial drop lists will be due in the Serials Acquisitions office. The Serials Acquisitions Librarian will prepare a composite list of dropped titles and route it to each academic department's chair and library representative, library staff responsible for library fund codes, as well as the Assistant Vice-President, University Library, and the Collection Development Librarian. An accompanying letter will indicate that the composite list should be reviewed and a list of titles for which the department is willing to assume the ongoing costs should be sent to the Serials Acquisitions Librarian. The

composite list will be sent on or around April 1st, and replies are due on or around May 1st.

- 2.05 The Serials Acquisitions Librarian will prepare a final drop and pickup list with serials estimate adjustment totals by department.
- 2.06 Actions taken as a result of the Serials Review will become effective the following fiscal year.

III. OL Review

- 3.01 This OL will be reviewed every five years. Next review is due in December 2013.
- 3.02 This OL will be reviewed by the Head Acquisitions Librarian.

IV. INDEXING TERMS

- 4.01 Serials Review
- 4.02 Allocation of library materials budget

V. APPROVAL

5.01 \_\_\_\_\_  
Head Acquisitions Librarian      Date

5.02 \_\_\_\_\_  
Assistant Vice President      Date  
University Library