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| --- |
| Dartmouth College Library |
| AcquisitionsServices Annual Report FY11 |
| July 1, 2010 to June 30, 2011C:\Users\Judy_Maynes\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\QS8R4IGD\MP900442364[1].jpg |

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| Judy Maynes, Head of Acquisitions ServicesAugust 5, 2011 |

**Dartmouth College Library**

**Acquisitions Services**

**Annual Report FY 2011**

**Executive Summary Highlights**

1. Acquisitions staff provided specialized support and expertise to the library administration, subject selectors, and the Director of Digital Resources to help meet a $550,000 reduction in the Information Resources allocations for fiscal year FY11.
2. Reallocated duties formerly handled by the department’s Financial Specialist who transferred to the Finance Center in November 2010. Accomplished this by creating a Financial Team which substantially increased the workload of existing Acquisitions staff, including the department head, in order to adequately absorb these high-priority financial responsibilities.
3. Improved communications to library staff about Acquisitions activities by writing a series of *Acquisitions Updates*.
4. To develop staff expertise to meet a growing need for collection assessment and analysis services for the library, Acquisitions reallocated the open Financial Specialist position to create a new position as Collection Assessment and Analysis Librarian to begin in the fall of 2011. We launched a national search in May 2011, completed the phone interview phase in June 2011, and held campus interviews in July 2011.
5. *Green Workflow Design:* redesigned the database for managing the annual cycle of subscription cancellations and transitions from print to digital formats to increase the efficiency of this work and eliminate the use of paper. This could not have been accomplished without the significant technical expertise provided by Paul Merchant in the Digital Libraries Technology Group and the programmatic workflow detail provided by Rebecca Torrey. All requests are now received, routed, managed, and tracked by multiple staff entirely within the database.

**Statistical Highlights**

$ 9,024,632 Information Resources budget

$ 141,263 Content Utilities budget (to support collection content)

Acquisitions, Cataloging, and Maintenance: (See Appendices V and VI)

* Acquisition placed a total of 30,079 orders in fy11, an average of 2500 per month.
* 77% of the Information Resources Budget supports serials and databases.
* Three and Five-Year Comparison:
	+ Total orders increased by 4.0% over a five-year period of fy07 to fy11.
	+ Approval orders increased 143%; firm orders decreased by 22% over 5 years.
	+ Records Maintenance activities have increased by 55% from fy09
	+ After a 24% increase in Serials Solutions Maintenance activities in fy10, we saw a 31% drop in fy11.

FY11 Library Holdings for Dartmouth Fact Book

* Note: Data are for fiscal year July 1, 2010 - June 30, 2011.
* \*Includes electronic journals, collections, databases, and monographs. Networked Resources data for individual libraries are not applicable. \*\*There may be duplicate counts of electronic serial titles between Total and Grand Total.
* 2,677,605 Printed volumes
* 2,587,446 Microform
* 806,042 Other formats
* 55,382 Serial Titles
* 517,383 Networked Resources
* 6,643,858 TOTAL

**Key Issues Looking Ahead**

Acquisitions staff must continually broaden their skills in order to provide the expertise required for collection services today. The proliferation of digital resources over the past twelve years along with the growth of more reliable digital archives has dramatically changed how we approach collection building. The cost of resources and limited budgets requires close scrutiny of the options available in order to meet the needs of our patrons in the best possible way. New opportunities to build shared collections with other institutions change the landscape once again and will alter our purchasing and access models, substantially expand use, and dramatically change how we assess our decisions. The addition of a Collection Assessment and Analysis Librarian in FY12 will provide the expertise, focus, and training that will allow us to expand the department’s participation in collection assessment activities. This may also provide the additional staff resources necessary to reach our delayed goal to consolidate serial vendors which would in turn reduce cost and increase the level of service provided by the vendor.

Preparations were made for the Materials on Demand Program purchases to transfer from the Resource Sharing staff to the Acquisitions Rush Order Team in FY12 to take advantage of existing and efficient processes and expertise.

It is imperative that we complete job audits and position reviews this year to appropriately align job descriptions to the level of skills and expertise required today. We must also assess the impact on current staff from absorbing a full-time financial workload following the transfer of the Financial Specialist. We must also hire and train a new Vendor Specialist to replace Cheryl Burns who retires September 30, 2011. We have also committed .3 - .5 FTE from existing staff resources in FY12 should the Hathi Trust copyright review grant be awarded.

Our excellent services are provided through the collective effort and contributions from individual staff members. I commend each member of Acquisitions for their dedication to our service goals and for their willingness to take on additional and new responsibilities whenever needed.

**Appendices Attached:**

1. Acquisition Staff June 30, 2011
2. Financial Information and Responsibility Changes
3. Library Committees, Working Groups, Diversity & Staff Development
4. Holdings FY11
5. Ordering and Cataloging Statistics over Five Years
6. Records Maintenance Activities 3-Year Comparison
7. Acquisitions Services Mission and FY12 Goals

**Expanded Highlights**

Collection Development & Vendor Relations

* Cancelled all newspapers held in the News Center except NYT & Valley News.
* Managed 996 cancellation, print-to-digital transitions and subscription changes
* Joined JSTOR Current Scholarship Program.
* Joined the HathiTrust in August 2010.
* Latin American shared collection with Brown initiated in the fall of 2010.
* Cancelled Spanish, Latin American, and French standing order to realign overspend in these areas.
* Transferred 429 standing orders from Blackwell to Coutts following the purchase of Blackwell Books by YPB.
* Continued JSTOR de-accessing project
* Barnes & Noble ended their Library Invoicing Program requiring us to return to credit card purchasing, which is more time-consuming than invoice processing.

Beta Testing and Other Initiatives

* Participated in the SwetsWise 6.0 Beta Test
* Trialed *Oasis Review Shelf* for making approval selections online prior to shipment. Participating bibliographers included: Laura Braunstein, Noah Lowenstein, Ann Perbohner, and Jane Quigley.

Digital Resources Acquisition and Access

* Participated in the Springer package assessment; a substantial assessment project
* Completed the ERMIT2 Implementation Teams Final Report (Nov 2010)
* Launch new Print to Digital Database – March (Paul Merchant)
* Collaborated with Cataloging and Metadata staff to review workflow for cancelled standing orders and multi-parts.
* Updated e-Resources workflow procedures
* Continued license review project in preparation for building license records
* Completed the implementation phase and began building ERM license and resource records in Millennium Electronic Resources Management Module.
* Worked with Barbara DeFelice to plan for the Proquest platform migration
* Participated in the Summon database recommender implementation
* Updated the Collection Development Desired e-Resources List
* Researched and resolved 146 Electronic Journal Access Problem Reports

Financial Management

* Appropriations were entered into Millennium by Aug 5, 2010, except for Tuck, Thayer, and Medical allocations that were unavailable at the time.
* Resumed invoice keying August 5, 2010.
* Analyzed and adjusted year-end spending to take advantage of specially priced archival purchase offers.
* Content Utilities budget management transferred from Lora Thompson to Elizabeth Kirk. Renewals and invoice payments were consolidated with Acquisitions and are now monitored and tracked in Millennium.
* Improved budget projections by initiating the use of a *‘Raction’* code in Millennium to capture idiosyncratic purchases such as subscription term adjustments, multi-year installment plans for one-time purchases, etc., and use this to generate an itemized spreadsheet report for the Associate Librarian in the early spring.
* Changed all 'sheal' funded items to 'smlbd' beginning in 2010 at the request of Peggy Sleeth; updated records and redistributed multi funds.
* Ended our Guaranteed Rate Program with EBSCO. The impact saved money but increased the number of supplemental invoices that needed to be processed.
* Procedures were updated and documentation was written to all financial activities, including a policy statement regarding how responsibilities and activities are divided amongst staff in order to comply with necessary fiscal financial controls.

Outreach & Education:

* Participated in New Staff Orientation: Oct 20, 2010 and April 25, 2011
* Introduced monthly or bi-monthly *Acquisitions Updates* to increase communication regarding Acquisitions processes and timelines.
* Launched a Review File Team webpage in February 2011 that included a list of core review files available and a questionnaire form for requesting custom reports.
* Department Head was invited to attend a Cataloging & Metadata staff meeting in December, 2010 to talk about changes in Acquisitions.

Staff Coverage and Reassignment of Responsibilities

* Staff assumed additional duties for 17 weeks to cover 3 staff leaves of absence.
* Created a Financial Team to handle work formerly done by the Financial Specialist. Members include: Sarah McBride, Barbara Sterling, Cherie Burns, and Judy Maynes. \**See Appendix II for a detailed list of responsibilities\**
* Jan Peltzer increased hours on the digital team from 3 to 5 days per week.
* Marianne Densmore increased her hours from 4 to 5 days per week.
* The expected reallocation of half of Kathy Walker’s hours to the digital team was not possible due to other commitments, responsibilities and department needs.
* Liaison assignments were adjusted to rebalance workload following the retirement of Miles Yoshimura, and the reallocation of hours to digital resources for Jan Peltzer and Marianne Densmore.

Staff Job Audits and Position Reviews

* Reinitiated the process of reviewing job descriptions for job audits and position changes; to be completed in FY12.

Staff Transfers

* Kathleen O’Neill, Financial Specialist, transferred to the Financial Center on November 10, 2010.

Department Administration:

* Acquisitions Supervisors, Julie McIntyre and Kathleen Walker, received certification in the Management Essentials at Dartmouth Program (MEAD).
* Organized a staff retreat with Mary Childers on Communication & Feedback which was held on Oct 14, 2010.
* Revised the department’s Emergency Plan Nov 2010.
* Designed workflow to incorporate MOD selection.
* Outlined department lighting concerns with the campus lighting expert; remedy is still pending.
* Researched and drafted a job description in preparation for a new Collection Assessment and Analysis Librarian position. Chaired a search committee for recruitment in FY12.
* Prepared computers and staff for transition to *Blitz-2-Blitz* email and calendar system

**PROGRAMS**

Alumni Memorial Books Fund Program (AMBF)

* $11,312.14 credited to the Information Resources budget from AMBF receipts.
* 440 alumni class members memorialized.

Financial Gifts Program: Memorial and Non-Memorial Gifts

* $2,261.00 credited to the Information Resources budget from financial gift receipts.
* 7 class members were memorialized.
* Created procedures and managed three short-term memorial gift funds for the following individual memorials:
	+ Robert Kolbe D34 Memorial Fund (July-Oct 2010; completed)
	+ Ryland E. Robbins, Class of 1944, Memorial Fund (March 2010 – current)
	+ Robert Park Sherman Memorial Fund (May 2010 to current)

Better World Books Library Discards & Donations Program

* $1,575.78 sales commissions received
* 4260 lbs (2.1 Tons) books shipped to Better World Books

**APPENDICES**

**Appendix I: Acquisitions Staff as of June 30, 2011**

|  |  |  |  |
| --- | --- | --- | --- |
|  |  |  |  |
| **Staff Member** | **Hours** | **Title** | **Grade** | **Start Date** |  |
| Braman, Alexander | 37.5 | Acquisitions Assistant II | AAT C | 5-31-2005 |   |
| Burns, Cheryl L | 37.5 | Vendor Specialist | DRMA | 9-2-1986 |  |
| Bushway, Karla E | 37.5 | Acquisitions Assistant II | AAT C | 1-8-2001 |  |
| Caruso, Susan A | 37.5 | Acquisitions Assistant II | AAT C | 9-1-1998 |  |
| Corriveau, Miriam J | 37.5 | Acquisitions Assistant II | AAT C | 8-24-1992 |  |
| Densmore, Marianne | 37.5 | Acquisitions Assistant II | AAT C | 12-22-1986 |  |
| Fegan, Suzette K | 37.5 | Acquisitions Assistant II | AAT C | 1-28-1988 |  |
| Gilbert, Roberta A | 37.5 | Acquisitions Assistant II | AAT C | 9-21-1987 |  |
| Heath, Lori A | 37.5 | Acquisitions Assistant II | AAT C | 9-18-2006 |  |
| Maynes, Judy | exempt | Head of Acquisitions Services | LP III | 7-6-1999 |  |
| McBride, Sarah E.E. | 20 | Acquisitions Assistant II  | AAT B | 9-10-2007 |  |
| McIntyre, Julie P | 37.5 | Acquisitions Supervisor  | DRMB | 6-30-1980 |  |
| Peltzer, Jan E |  37.5 | Acquisitions Assistant II | AAT C | 11-14-2005 |  |
| Sterling, Barbara W | 37.5 | Acquisitions Assistant II | AAT C | 6-13-1988 |  |
| Torrey, Rebecca M | 37.5 | Digital Resources Specialist | DRMA | 9-6-2000 |  |
| Vinapol, Donna M | 37.5 | Continuing Resources Specialist | DRMA | 10-2-1995 |  |
| Walker, Kathleen A | 37.5 | Acquisitions Supervisor  | DRMB | 8-25-1986 |  |
| Welch, Karen J | 37.5 | Acquisitions Assistant II | AATC | 1-24-2005 |  |
| Wolfe, Timothy | 37.5 | Acquisitions Assistant II  | AAT B | 10-15-2007 |  |
|  |  |  |  |  |  |
| **Transfers**  |  |  |  |  |  |
| O'Neill, Kathleen E | 37.5 | Financial Management Specialist | DRMB | 7-29-1985 |  |
|  |  |  | End date 11/12/2011 |  |   |

**Appendix II: Financial Information and Responsibility Changes**

|  |
| --- |
| **FY11 Information Resources and Content Utilities Budgets**  |
|  |  |  |
| **Budget Area** | **Appropriations** |  |
| Arts & Sciences |  $ 6,454,490.60  |  |
| Business & Engineering |  $ 1,438,619.00  |  |
| Medical Science |  $ 1,131,523.00  |  |
| **Totals** |  **$ 9,024,632.60**  |  |
|  |  |  |
| **Content Utilities in support of collections** |  **$ 141,263.72**  |  |

**Financial Responsibility Changes**

Financial responsibilities absorbed by other Acquisitions staff following the transfer of Financial Specialist, Kathleen O’Neill:

* Budget allocations at the individual fund level
* Budget appropriations and hierarchies set up in Millennium
* Encumbrance Reconciliation Reports in preparation for new fiscal year
* Fiscal close activities
* Weekly EDI
* IRA Reports
* Fund Balance Reports to Associate Librarian for Information Resources
* Fund adjustments and chart-string changes
* Content Utilities invoice approval and tracking in Millennium
* Stewardship Program Data tracking and annual reports
* Documentation of procedures,
* P-card management for two acquisitions p-cards
* Year-End encumbrance reconciliation
* Oracle access for payment information, vendor updates and changes
* Invoice Team leadership
* Response to financial inquiries
* Financial records management and invoice filing
* Invoices requiring special processing and Wire Transfers
* Keying p-Card payments
* ILL check deposits and invoice processing
* Check deposits: Better World Books, vendor overpayments, reimbursements, AMBF, Financial Gifts.
* Invoice approval: Special Collections
* Liaison to Special Collection Librarians
* Liaison to Accounts Payable

Transferred to the main library office:

* non-Acquisitions P-card management

**Appendix III: Library Committees, Working Groups, and Staff Development**

|  |
| --- |
| **Committees and Working Groups** |
| Collection Assessment and Analysis Librarian Search Committee |
| Collection Development Forum (CD Forum) |
| Collection Services Coordinators (CSC) |
| Dartmouth College Library Staff Association, Welfare (DCLSA)  |
| Information Securities Representative |
| Lib-Cat Coordinators Group |
| Library Assessment - Analyzing the Triennial Library survey |
| MOS (Microsoft Online Services) Implementation Testing Team - New Blitz System |
| Preservation, Acquisitions & Cataloging and Metadata (PACC) |
| Search Committee: Collection Assessment & Analysis Librarian |
| Search Committee: Library System Administrator |
| Systems Administrator Transition Planning Team |
| Technical Coordinators (TeCor) |

|  |  |  |
| --- | --- | --- |
| **Staff Development Activities** | **Sponsor** | **Date** |
| Advanced Create Lists | Innovative Interfaces | Mar. 9, 2011 |
| Excel Spreadsheet  | Online | Winter 2010 |
| Introduction to Excel |   | Apr. 7, 2011 |
| IRA Basics | HR | Nov. 16, 2010 |
| JSTOR Current Scholarship Program | Webinar | Jul. 16, 2010 |
| Management Essentials | HR | Oct. 8, 2010 |
| Managing Documents in Word |   | Apr. 1, 2011 |
| MEAD (Management Essentials at Dartmouth) | HR | Nov. 2010-July 2011 |
| Oracle Invoice Look up | Accounts Payable | Dec. 10, 2010 |
| Outlook Training | Computing | Jun. 22, 2011 |
| Your Benefits Your Choices - Mail Order |   | Aug. 25, 2010 |
| Your Benefits/Anthem | HR | Sept. 28, 2010 |
| Your Benefits/Preferred BS/BC | HR | Oct. 19, 2010 |

|  |  |  |
| --- | --- | --- |
| **Conferences & Advisory Groups** | **Location**  | **Date** |
|  "Engaged Design: Architecture Students and the Berry Combined Desk" | Inspiring Ideas Conference | Mar. 23, 2011 |
| "Undergraduate admissions process | Inspiring Ideas Conference | Mar. 23, 2011 |
| "Undergraduate Student Support Services | Inspiring Ideas Conference | Mar. 23, 2011 |
| "Your Defensive Mindset" | Inspiring Ideas Conference | Mar. 23, 2011 |
| Charleston Acquisitions Conference | Charleston, SC | Nov. 27-30, 2010 |
| Coutts Advisory Committee Meeting | via WebEx | Jan. 7, 2011 |
| Ingram Academic Advisory Group | via WebEx | June. 24, 2011 |
| Innovative Reporter | WebEx | Mar. 3, 2011 |
| It's Only as good as the Metadata | NISO Webinar | Oct. 13, 2010 |
| IUG (Innovators Users Group) Meeting | San Francisco, CA | Apr. 13, 2011-Apr. 15, 2011 |
| PEAK College Program - "Hood Highlights Tour" | HR | Nov. 9, 2010 |
| PEAK College Program - "Making Mindful Listening part of your everyday life" | HR | Nov. 10, 2010 |
| PEAK College Program - CITE Social status at work | HR | Nov. 9, 2010 |

|  |  |  |
| --- | --- | --- |
| **Diversity Events Attended**  | **Location** | **Date** |
| Lecture - Dorsett Fellow Ken Feinberg | Dartmouth Ethics Institute | May. 10, 2011 |
| Lecture - Gina Barrecca "Babes in Snowland" | Friends of the Dartmouth College Library | Feb. 11, 2011 |
| Lecture - Sherry Turkle "Alone Together" | Digital Humanities Lecture Series/Leslie Center for the Humanities | Feb. 10, 2011 |
| Lecture- Dr. Aravind: Restoring Vision to millions |   | Jul. 14, 2010 |
| Lecture on "Jewish Gospel"  | Roth Center and Hopkins Center | Apr. 14, 2011 |
| Lecture Series: Calvin Trillin | Montgomery Endowment | Feb. 1, 2011 |
| Lecture Series: Dan Barber | Montgomery Endowment | Feb. 22, 2011 |
| Lecture Series: Ruth Reichl | Montgomery Endowment | Feb. 8, 2011 |
| Martin Luther King Jr. Day Employee Celebration Breakfast | HR | Jan. 17, 2011 |
| Martin Luther King Jr. Day Employee Celebration Community Lunch Panel Discussion | Office of Institutional Diversity and Equity | Jan. 20, 2011 |
| *More than Walking* | Library Diversity Committee | Oct. 4, 2010 |
| *Museums in Modern Egypt*, with Dr. Christine Lilyquist | Library Diversity Committee | Jun. 29, 2011 |
| Presentation by South African performer, anthropologist, and activist Johnny Clegg | Environmental Studies Department | Apr. 6, 2011 |

**Appendix IV: Holdings FY11**

FY11 Library Holdings for Dartmouth Fact Book

* 2,677,605 Printed volumes
* 2,587,446 Microform
* 806,042 Other formats
* 55,382 Serial Titles
* 517,383 Networked Resources
* 6,643,858 TOTAL

**Appendix V. Ordering & Cataloging Statistics over Five Years**

* Note: Data are for fiscal year July 1, 2010 - June 30, 2011.
* \*Includes electronic journals, collections, databases, and monographs. Networked Resources data for individual libraries are not applicable. \*\*There may be duplicate counts of electronic serial titles between Total and Grand Total.

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | **FY07** | **FY08** | **FY09** | **FY10** | **FY11** | **% change FY07 to FY11** | **% change FY10 to FY11** |
| **TOTAL ORDERS**  | **28,923** | **33,833** | **37,633** | **30,970** | **30,079** | **4.0%** | **-2.9%** |
|  |  |  |  |  |  |  |  |
| **Monographic**  |  |  |  |  |  |  |  |
| Firm orders | 19,578 | 19,592 | 19,995 | 15,445 | 15283 | **-21.9%** | **-1.0%** |
| Approvals | 5,186 | 10,536 | 12,084 | 13,189 | 12579 | **142.6%** | **-4.6%** |
| BLSO items | 765 | 725 | 608 | 219 | 190 | **-75.2%** | **-13.2%** |
| Books in series | 2,060 | 1,620 | 1615 | 886 | 704 | **-65.8%** | **-20.5%** |
| Class dups | 79 | 35 | 20 | 31 | 11 | **-86.1%** | **-64.5%** |
| Multiparts  | 152 | 149 | 172 | 68 | 99 | **-34.9%** | **45.6%** |
| Other | 18 | 8 | 43 | 23 | 42 | **133.3%** | **82.6%** |
| CJK |  |  | 522 | 351 | 117 | **-77.6%** | **-66.7%** |
| Repl. | 371 | 659 | 749 | 292 | 316 | **-14.8%** | **8.2%** |
| **Total Mono**  | **28,209** | **33,324** |  **35808**  |  **30,504**  | **29,341** | **4.0%** | **-3.8%** |
|  |  |  |  |  |  |  |  |
| **Total Serials**  | 714 | 509 | 1825 | 463 | 738 | **3.4%** | **59.4%** |
|  |  |  |  |  |  |  |  |
| **Total Orders** | 28,923 | 33,833 | 37,633 | 30,970 | 30,079 | **4.0%** | **-2.9%** |
| **Average/month** | 2,410 | 2,819 | 3,136 | 2,581 | 2,507 | **4.0%** | **-2.9%** |
|  |  |  |  |  |  |  |  |
| **Other orders** |  |  |  |  |  |  |  |
| RUSH | 1,026 | 803 | 615 | 678 | 685 | **-33.2%** | **1.0%** |
| Gift | 2,063 | 1,133 | 1478 | 1255 | 1,859 | **-9.9%** | **48.1%** |
| Digital Resources | 454 | 387 | 1,652 | 386 | 326 | **-28.2%** | **-15.5%** |
| Videos/DVDs | 1,695 | 1,598 | 1,916 | 1,976 | 1,568 | **-7.5%** | **-20.6%** |
| Kindle |  |  | 26 | 16 | 1 | **-96.2%** | **-93.8%** |
|  |  |  |  |  |  |  |  |
| **CATALOGING ACTIVITY (Acquisitions)** |  |  |  |  |
| Monographs | 15,233 | 14,190 | 7210 | 705 | 348 | **-97.7%** | **-50.6%** |
| Serial titles  | 127 | 106 | 66 | 43 | 143 | **12.6%** | **232.6%** |
| Scores  | 13 | 1 | 4 | 4 | **7** | **-46.2%** | **75.0%** |
| Maps | 12 | 6 | 4 | 0 | 0 | **-100.0%** |  |
|  |  |  |  |  |  |  |  |
| **All cataloging** | **15,385** | **14,303** | **7284** | **752** | **498** | **-96.8%** | **-33.8%** |
|  |  |  |  |  |  |  |  |
| \*Monograph replacements include serials  |  |  |  |  |
| #With FY07, counting approval slips with firm orders since they are ordered individually. |  |

**Appendix VI. Records Maintenance Activities 3-Year Comparison**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Records Maintenance Activities**  | **FY 09** | **FY 10** | **FY11** |  |  |  |
| Added copy | 5 | 30 | 99 |  |  |  |
| Cancelled | 607 | 747 | 983 |  |  |  |
| Ceased | 112 | 138 | 279 |  |  |  |
| Discard  | 157 | 450 | 705 |  |  |  |
| Holdings update | 468 | 587 | 393 |  |  |  |
| Inactive (new) | 26 | 21 | 49 |  |  |  |
| New titles | 95 | 52 | 56 |  |  |  |
| Recatalog | 3 | 0 | 0 |  |  |  |
| Reclass | 0 | 0 | 0 |  |  |  |
| Retrospective conversion | 1 | 0 | 0 |  |  |  |
| Title change (new) | 28 | 16 | 36 |  |  |  |
| Title change (old) | 32 | 17 | 69 |  |  |  |
| Transfer | 279 | 113 | 142 |  |  |  |
| Withdraw | 0 | 1 | 4 |  |  |  |
|  |  |  |  |  |  |  |
| **TOTAL ACTIONS** | **1813** | **2172** | **2815** |  |   |  |
| % change |  | 20% | 29% |  |  |  |
| These statistics do not reflect any electronic resource counts (except for URL updates) as we don’t have any for these. |  |  |
|  |  |  |  |  |  |  |
| **Serials Solutions Maintenance** | **FY09** | **FY10** | **FY11** |  |  |  |
| Database changes \*  | 108 | 1000 | 666 |  |  |  |
| Title Changes \*\*  | 3409 | 3930 | 2750 |  |  |  |
| Serial subscription changes: print to digital | 152 | 0 | 0 |  |  |  |
| Serial subscriptions changes: cancellations | 302 | 0 | 0 |  |  |  |
| Other |  | 6 | 0 |  |  |  |
| **Total** | **3971** | **4936** | **3416** |  |  |  |
| % change |  | 24.30 | -30.79 |  |  |  |
| **TOTAL** includes changes made by all who makes changes in the database, including Cataloging & Metadata, Serials Solutions Staff & Acquisitions staff. |
| \* **Database changes** (selected or deselected databases, or updated title coverage from "we subscribe to all in the database" to "We subscribe to only some of the titles in this database.") |
| \*\* **Title changes** (Includes URL changes or custom URL additions, coverage date changes, title selection or deselection.) |

**Appendix VII: Mission and FY12 Goals**

Mission: To provide exceptional support services for all collection development activities through prudent stewardship of the materials budget and strong working relations with our customers, colleagues and business partners.

Goals:

Communication and Customer Service

* Provide the highest quality customer service and support.
* Update content on Acquisitions webpage to better communicate services and processes.
* Develop a new Alumni Memorial Books Fund Program brochure.
* Write regular *Acquisitions Updates* for improved communication to bibliographers

Collection Development

* Incorporate Materials on Demand purchasing into the Rush Order Team workflow
* Review bibliographers’ serials lists to ensure that budget targets remain appropriate
* Conduct a complete review of Coutts subject area profiles and adjust as recommended
* Consolidate major serial vendors to reduce overall costs, better utilize vendor services, and streamline workflow.

Department Administration, Staff Resources and Development

* Hire Collection Assessment and Analysis Librarian
* Hire Vendor Specialist
* Develop orientations for new department staff
* Complete job audits and job description reviews
* Assess impact of the loss of the Financial Specialist position
* Establish a records management retention policy for Alumni Memorial Books Program
* Participate in the HathiTrust Copyright Project beginning in December 2011 if the grant is awarded; assign .3 FTE

Systems in Support of Collections

* Build ERM resource and license records; write procedures for managing licenses and retrospective data entry; explore feasibility of utilizing ERM to track product offers and trials
* Enhance FileMaker supporting the Financial Memorial & Non-Memorial Gifts Program.
* Provide support for discovery systems such as SUMMON
* Test tracker system software for monitoring digital access problems
* Participate in remaining SwetsWise 6.0 beta test