

Dartmouth College Library
Acquisition Services
Annual Report 2005/2006

~ **Summary Overview** ~

Significant change and movement in staff positions were predominant themes this year. After a two-year search for a new department head and an equally long stretch of being short staffed and working extra hours, a department head was hired from within the department. This resulted in a domino-effect need to reorganize, repurpose key positions, redistribute assignments and train new staff members as quickly as possible. I am grateful for the support and guidance from the library administration as we continue to make these transitions. Acquisitions staff continues to prove resilient and it is their dedication, prodigious expertise and willingness to go the extra mile that I most wish to highlight this year. The care and effort each staff member puts into their work each day is what allows Acquisitions Services to move forward and continue offering a high level of service throughout this unique and stressful time. I am extremely proud of all they have accomplished.

Other highlights include:

- An exceptionally smooth fiscal year close
- Improved communication and teamwork
- Improved cross-departmental processes & training by working closely with Cataloging & Metadata and Preservation Services to review and update workflow
- Established a Training Team to bring managers and trainers together and developed a comprehensive basic-training plan for new staff
- Initiated meetings with bibliographers to assess needs and priorities
- Participated in key projects and workgroups including: Thomson's ISI Journal Use Reports, WebFeat, and MARC21 Holdings Standards
- Improved services by updating and streamlining many internal work procedures

With many internal staff changes in place, we now have the opportunity to focus more closely on evaluating priorities and services. Insights and input from our incoming Associate Librarian will come at a critical time for Acquisitions. Over the past several years we have seen a significant increase in the demand for staff time and expertise for managing digital resources, an increase that not been matched with additional staff. At the same time, staff resources have decreased and more maintenance tasks such as claims have largely gone undone. The task for the coming year is to reevaluate priorities and resources to best accommodate a fast-changing environment with reduced staff resources, while at the same time continuing to offer high-quality services in support of collection development. An expanded report and appendices are attached.

On behalf of all Acquisitions staff,

Judy Maynes,
Head of Acquisitions Services
July 28, 2006

~ **Expanded Annual Report** ~

Personnel Changes

Head of Acquisitions

- John R. James, Associate Librarian of the College, and Peggy Sleeth, Associate Director of Dana Biomedical Library continued to serve as Co-Department Heads through July 2005.
- Judy Maynes, Acquisitions Supervisor, served as Acting Head of Acquisitions during August and September 2005 and was subsequently hired as Head of Acquisitions effective October 1, 2005.

Support Staff Changes, New Hires & Leave of Absence

- William B. Hankel resigned his FT position - August 2005
- Gloria Densmore transferred from PT to FT (position vacated by Mr. Hankel) - September 2005
- Jan Peltzer was hired into the PT position vacated by Gloria Densmore - November 2005
- Jan Peltzer transferred to FT position vacated due to upgraded Specialist position - May 15, 2006
- One FT staff member away on medical leave from April 24th to July 31, 2006

Internal Promotions:

- Julie McIntyre was promoted from Serials Specialist to Supervisor - Dec 2005
- Kathy Walker was promoted from Bibliographic Specialist to Supervisor - Dec 2005
- Kathy O'Neill was promoted from Financial Specialist to Financial Management Specialist, reporting now to both Head of Acquisitions and to the Financial Resources Manager
- Donna Abbott was promoted from Acquisitions Assistant to Continuing Resources Specialist - March 6, 2006 (a combination of two former specialist positions: Serials Specialist and Bibliographic Specialist)

Loss of Positions: 1.5 FT

- One FT supervisory position was permanently removed from Acquisitions and repurposed to create a new Digital Resources Coordinator position for the library
- One FT Specialist position was upgraded to a Supervisor position in order to return to a 4-person department management team for the first time in over two years.
- One half of Kathleen O'Neill's FT position is now used to support select library financial services formerly completed by staff in the main library office.

Requested Positions: + .5

To help alleviate the loss of FTEs and the ever-increasing digital acquisitions workload, we requested that our PT position be upgraded to FT. While supported by the library administration, it was ultimately not funded in either FY06 or FY07.

Administration

Communication

Acquisitions staff designated "communication" as our top goal this year deeming it the necessary foundation for further department development

- Completed our third department communication workshop with HR
- Completed training and implemented Dartmouth@Work
- Implemented staff recommendations for changes to department meetings
- Added staff to our department interview committee for new hires
- Improved communication with other departments through joint meetings and cross-departmental working groups

Training & Support

- Initiated an Acquisitions Training Team to develop a cohesive training program for new staff
- Completed Phase I: a comprehensive training plan for new staff in their first six months
- Held additional weekly AMT meetings to support transition to supervisory roles for newly-promoted management staff.
- Continued to assist with transition of Current Periodicals Room and News Center management to Access Services

Facilities:

- Investigated the cost to add “stackers” for low cubicle walls in an effort to cut down on noise and visual distractions. Ordered stackers for two workstations to test results before making a recommendation to purchase more as soon as funds are available.
- Investigated cost of adding portable 8x12 room for supervisor/staff meetings since no private meeting space exists in Acquisitions.

Acquisitions & Collection Development Support

- Began assessment of service needs and priorities with bibliographers
- Worked closely with Preservation and Cataloging & Metadata Services through a joint management team (CSMG) to improve overall support services by reviewing cross-departmental processes, procedures and guidelines.
- Began development of a Foreign Approvals Team for better management and support
- Improved services by reviewing and modifying workflow processes including: firm, Chinese and rush orders; serials bindery pickup, AMBF and gifts, FastCat cataloging, and mail receipt.
- Created 36,586 new orders, an overall increase of 10.5%. Detailed highlights include:
 - 1,235 expedited Rush orders, a 49.5% increase averaging 24 rush orders per day
 - 1,370 gifts added to the collection, a 2% increase
 - 16,572 approval books processed, a 14 % increase
 - 1,681 video/DVD orders, a 23% increase
 - 394 digital orders, a 42% decrease reflecting fewer print-to-digital transitions in FY05 and completion of several major digital package transfer projects over the past few years.

Alumni Memorial Books Program (AMBF) and Gifts

- Added the Class of 2002 to the Alumni Memorial Books Program
- Credited \$20,288.27 to the materials budget through AMBF receipts
- Worked with 92 donors in the book gifts and financial gifts programs
- Credited \$4,625 to the materials budget through miscellaneous financial gifts

Cataloging & Serials Records Maintenance

- Improved quality of FastCat Cataloging by working jointly with Cataloging & Metadata to redesign and implement cross-departmental FastCat training
- Cataloged 15,992 titles, a 20% increase over last year.
- Acquisitions staff was responsible for cataloging 52% of all books within a few days of receipt, and 49% of all serials. Overall, 47% of all cataloging was completed in Acquisitions Services
- Completed 1,301 serials records maintenance operations, a 47% drop in activity over the past year and a 97% drop over a two-year period. We believe this drop represents a shift in workflow from internal records maintenance to Serials Solutions site administration and the movement from paper-based serials collections to digital formats.

Digital Resources Management

- Continued implementation of Article Linker
- Participated in the investigation of the Electronic Resources Management (ERM) module
- Began advanced training for Acquisitions Assistant on digital team
- Transferred the Kluwer & Springer Link digital package plan subscriptions to Harrassowitz
- Completed 50 Print-to-Digital Transitions
- Completed approximately 1000 site administration transactions on Serials Solutions (based on a six-month figure of 558)
- Managed approximately 22 new digital resources trials

Financial Operations

- Continued monthly reconciliation of Controller and library fund balances to quickly identify and resolve discrepancies with Accounts Payable.
- Concluded another smooth fiscal close for FY06, again reflecting increased control and awareness of the materials budget matters throughout the year.
- Developed a database to identify non-receipt of high-end renewal invoices leading to faster resolution and better fiscal control at year end.
- Assumed responsibility for all bibliographic utility invoices for payment through Millennium in an effort to consolidate all collection development accounts payable activities through Acquisitions

Special Projects & Business Partnerships

- MARC21 Holdings Standards: continued work on the Holdings Standards Working Group with Cataloging & Metadata Services to make final recommendations & design a training plan.
- Electronic Resource Management: participated in the investigation phase of Innovative's ERM module. This phase was ultimately postponed due to the lack of available staff time & resources
- Federated Search Engine: participated in the implementation of Search360, Dartmouth's new federated search engine from WebFeat.
- Journal Use Statistics: participated in a multi-institutional partnership with Thomson ISI to design, develop and test a Journal Use Report Product for use in gathering and assessing use statistics for electronic resources.

Vendor and Business Relations

- Arranged and hosted 14 visits from vendors and publishers to discuss products and services
- Established a French approval plan through Aux Amateurs de Livres
- Consolidated all Proquest digital subscriptions to a common fall renewal date
- Currently working with Thomson Financial to reconcile invoice & renewal problems and consolidate subscriptions to a common fall renewal date.

Attachments:

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APPENDIX I

Acquisitions Services Organizational Chart – June 30, 2006

James Wright President			
Barry Scherr Provost			
Jeff Horrell Dean of Libraries and Librarian of the College			
John R. James Associate Librarian of the College			
Judy Maynes Head of Acquisitions Services			
Carol Magenau Acquisitions Services Librarian	Julie McIntyre Acquisitions Supervisor	Kathy Walker Acquisitions Supervisor	
Donna Abbott Continuing Resources Specialist	Alex Braman Acquisitions Assistant	Susan Caruso Acquisitions Assistant	Kathy O'Neill Financial Management Specialist
Cheryl Burns Vendor Specialist	Goodie Corriveau Acquisitions Assistant	Suzette Fegan Acquisitions Assistant	Barbara Sterling Acquisitions Assistant
Karla Bushway Acquisitions Assistant	Bobbie Anderson Gilbert Acquisitions Assistant	Karen Welch Acquisitions Assistant	Becky Torrey Digital Resources Specialist
Gloria Densmore Acquisitions Assistant	Jan Peltzer Acquisitions Assistant	Open .5 FTE position Acquisitions Assistant	
Marianne Densmore Acquisitions Assistant			
Tricia Frazer Acquisitions Assistant			

APPENDIX II
Acquisitions Services Staff Roster 2005/2006

* indicates promotions

Name	Current Position	Original Hire Date
Donna Abbott	Acquisitions Specialist*	10/2/1995
Alexander Braman	Acquisitions Assistant A	5/31/2005
Cherie Burns	Acquisitions Specialist	9/2/1986
Karla Bushway	Acquisitions Assistant A	1/08/2001
Susan Caruso	Acquisitions Assistant A	9/1/1998
Miriam J. Corriveau	Acquisitions Assistant A	8/24/1992
Gloria Densmore	Acquisitions Assistant A	8/14/2000
Marianne Densmore	Acquisitions Assistant A	12/22/1986
Suzette K. Fegan	Acquisitions Assistant A	1/28/1988
Patricia Frazer	Acquisitions Assistant A	6/17/2002
Roberta A. Gilbert	Acquisitions Assistant A	9/21/1987
Carol Magenau	Acquisitions Librarian	9/28/1987
Judith A. Maynes	Head of Acquisitions*	7/6/1999
Julie P. McIntyre	Acquisitions Supervisor*	6/30/1980
Kathleen O'Neill	Financial Mgmt Specialist*	7/29/1985
Jan Peltzer	Acquisitions Assistant A	11/14/2005
Barbara Sterling	Acquisitions Assistant A	6/13/1988
Rebecca Torrey	Acquisitions Specialist	9/6/2000
Kathleen Walker	Acquisitions Supervisor*	8/25/1986
Karen Welch	Acquisitions Assistant	1/24/2005

Acting Co-Heads of Acquisitions:

John James (March 2004- Oct 2005)

Peggy Sleeth (October 2004-July 2005)

Resignations:

William Hankel

Acquisitions Assistant A

End Date: 8/26/2005

Temporary staff:

Chelsea Pawlek, Summer 2005

Position Transfers & Change:

One FT Supervisor position moved from Acquisitions to Digital Resource Coordinator

One Specialist position upgraded to compensate for loss of Supervisory/management position

One-half of Financial Specialists position repurposed to cover select financial functions formerly carried out in main library office and help prepare for financial system change to OASIS.

APPENDIX III Staff Development and Diversity Activities

Diversity Events:

Diversity Event	Dartmouth Summer Arts Festival
Diversity Exhibits	Contemporary Art of East Asia (Hood Museum)
	Costa Rican Arts (Hood Museum)
Diversity Films	Cache (French film - French occupation of Algeria)
	Capote (Movie)
	Brokeback Mountain (Movie)
	"Forgotten Fires" & Discussion
	"Muslims" & Discussion
	Inherit the Wind & Discussion
	Muslims & Discussion
Diversity Lectures	Between Heaven and Hell: Religion Politics and Civil Rights
	Bill Cook on Walt Whitman
	Chalk Talk-Craig Wilder
	Past in Reverse: Contemporary Art of East Asia (Hood)
	Reel Women vs. Real Women-Josefina Lopez
	The Universal Menace of the New Anti-Semitic Onslaught Speaker Jeffrey Jacoby
	Virginia Beahan on Cuba
Diversity Performances	Bill Santiago, Latin Encuentros Comedian
	Celtic music (Salt Hill Pub)
	Children of Uganda (HOP Dance Performance)
	Coaxing the Spirits to Dance – Art and Society in the Papuan Gulf of New Guinea
	Compagnie KÁFIG Récital (French Dance Troupe) HOP
	Live Blues Music Performances
	Nutcracker Ballet
	TOOTS and THE MAYTALS (Reggae concert)
	Ceili Irish Dancers

Lectures and Library Events

Lectures	Polar Bear's perspective on climate change
	The Arctic and Climate Change: One Sick Canary (Jones Seminars on Science, Technology, and Society)
	Not Going Gentle: Rembrandt and the Roughness of Age (Hood)
	15th Stephen Harvard Lecture "Intelligent Design: The Perpetua Press" (Friends of DCL)
	First Friday Lecture Series

	Oliver Sacks "Creativity and the Brain" (Montgomery Series)
Random Acts of Art	Dartmouth Aires
	Dartmouth Dance Ensemble
	Dartmouth Gospel Choir
	Fusion Dance Ensemble
	Printing
	Sheba Dance Troupe

Staff Development Activities

Conferences	15th Annual North Carolina Serials Conference
	ALA Annual – New Orleans
	ALA Midwinter – San Antonio
	Collaborations on Campus: Opportunities for New Partnerships (DMS)
	Diversity - 3rd Annual Dartmouth College Support Staff Conference
	World Usability Day New England.
DC Information Session	Introduction to Oasis (Colleges new accounting system)
Library Workshops	Blogging in Academic Research Libraries, the why and the how
	Dartmouth College Library Spotlight Series
	Dartmouth@Work
	Google Scholar
	Slide-show/talk World Library and Information Congress
	Smart searching
	What's New with Google
	Searching Millennium & Online Catalog
Luncheon Learn	Continuing Your Education
	FISH (Seattle Fish Market)
	International, Cultural Opportunities at Dartmouth
	Unfolding America: The Readex Project
OLPD Workshops	Access Database design and training
	Anger Management 101
	BlitzMail, Oracle Calendar, and other Dartmouth Computing Basics
	Excel I & II
	FAS II
	FileMaker Pro
	How to bring out the better side of difficult people
	How to deal with difficult people
	Inquiry Skills
	Photoshop Workshop
	Pleasing the Challenging Customer & Creating Instant Partnership
	PowerPoint II

	PowerPoint: The Good, the Bad and the Ugly
	Proofreading Demystified
	Relational Database Design
	Seven Habits of Highly Effective People
	Word & Word II
	Appropriate Inquiry Skills
Webinars	ARL statistics
	Making Sense of Online Usage: What the Statistics Mean and How You Can Leverage Them
	Metapress Admin
Workshop - ARL	ARL Management Workshop - UCLA
Workshops - NELINET	Connecting to Your Database via PHP
	Database Structures and MySQL

APPENDIX IV

Library Committees, Projects & Working Groups

Acquisitions/ CatMet Working Group
 Article Linker Support Team
 Bar Code Working Group
 Cataloging Roundtable (CRT)
 Collection Development Forums
 Collection Management Planning Group (CMPG)
 Collection Services Dept Heads (CSDH)
 Collection Services Management Group (CSMG)
 Collection Services Round Table (CSRT)
 Dartmouth at Work Committee
 DCLSA Committees: Program Chair, Scholarship Chair, Secretary
 ERM Investigation Committee (ERMIT)
 FastCat Forums
 First-Year Open House Planning Committee
 Holdings Standards Implementation Group
 Thomson ISI Journal Use Reports Product Development Committee
 Library Staff Development Advisory Committee (LSDAC)
 Library Catalog Advisory Committee (LCAC)
 Library Management Group (LMG)
 Marketing & Communications Committee (MCC)
 Record Deletes Working Group
 Search Committee: Digital Resource Coordinator
 TECOR
 United Way Representative for Acquisitions Services
 WebFeat Implementation Team (WIT)

APPENDIX V
Vendor Visits 2005/2006

Vendor Visits FY06	Date	Vendor Representative	Staff Attending
Coutts	July 7, 2005	Cecile Shmookler	CLB, CM, JAM
Proquest	July 21, 2005	Patrick Moriarity	CLB, JAM
Ebsco Subs Services	July 21, 2005	Leslie Knapp, Sue Wolfman	CLB, JAM, JM, SF
Ebsco Publishing	October 11, 2005	John Henderson	JAM, BT
Ingram	October 11, 2005	Cathy Suehisa	CLB, JAM CLB, JAM, JM, DA, MD, SC,
Blackwell Books	October 20, 2005	Pat Adams	BG
Harrassowitz	October 25, 2005	Dena Schoen, Justin Clarke	CLB, JAM, CM, BT, SC
Proquest	November 22, 2005	Patrick Moriarity	JAM
Swets Blackwell	December 19, 2005	Alison Roth	JAM, JM, CB
Swets Blackwell	March 10, 2006	Alison Roth	JAM, JM, BT
Swets Blackwell	April 25, 2006	Alison Roth & Neil Cross	JAM, JM
Nardecchia	April 27, 2006	Richard Kluge	CLB, JAM
Ebsco Subs Services	June 6, 2006	Sue Wolfman, Leslie Knapp	CLB, JAM
Swets Blackwell	June 8, 2006	Alison Roth, Amy Paratore	CLB, JM, JAM, AB, MD, BT

APPENDIX VI
Selected Statistics

Multi-Year Ordering & Cataloging Statistics Comparison: FY1998 - FY2006

Ordering Activity	FY98	FY99	FY00	FY01	FY02	FY03	FY04	FY05	FY06
	Number	Number	Number	Number	Number	Number	Number	Number	Number
Monographic orders created	25,652	30,502	31,793	33,510	36,012	29,949	32,037	32,051	35,855
Firm orders	11,155	18,446	19,975	19,690	18,628	12,882	13,046	13,995	15,242
Approvals	7,978	8,375	8,649	10,236	13,443	13,041	15,116	14,522	16,572
BLSO items	749	1,004	515	921	1,024	1,030	949	781	1,036
Books in series	1,622	1,732	1,814	2,021	2,145	2,111	2,256	2,107	2,318
Class dups	530	148	67	164	318	112	68	95	60
Multiparts	253	308	480	420	277	213	157	202	165
Replacements	285	214							
RUSH orders	1,416	1,027							
Gift	1,664	1,786							
Other			473	58	177	265	445	39	12
Serial orders created	3,038	1,481*	1,726	1,450	1,386	1,784	1,088	1,045	734
Special categories:(both mono & serial)									
Replacements			308	380	473	295	264	310	430
RUSH			956	1,175	1,220	895	729	826	1,235
Gift			1,460	1,217	2,089	2,219	1,930	1,334	1,370
Gifts no order								377	423
Digital Resources			664	802	759	1,400	656	685	394
Videos/DVDs					1,127	976	1,117	1,362	1,681
Total Orders created	30,354	31,983	33,519	35,340	37,398	31,733	33,125	33,096	36,589
Cataloging Activity									
Monograph titles cataloged	17,194	17,766	19,560	16,805	16,987	12,878	12,430	13,133	15,800
Serial titles cataloged	420	184	494	452	655	602	198	156	169
Scores	203	254	225	38	7	9	7	5	5
Maps					24	7	16	12	18
Computer Files					5	2	0	2	0
Total cataloging	17,817	18,204	20,279	17,299	17,678	13,498	12,651	13,308	15,992

*Analytics and some other categories switched to Monographic orders in FY99.

APPENDIX VII

Acquisitions Services Goals for FY 2007

Alumni Memorial Books Program

- Initiate introductory visits with key staff in other Alumni-related departments to improve communication and understanding common goals

Bibliographer Services & Collection Development

- Continue to meet with bibliographers & libraries to assess service priorities
- Determine common reports & review files needed and develop procedures and guidelines for liaisons
- Update Bibliographer Profile document & individual profiles with bibliographers
- Develop New-Bibliographer Orientation Program
- Update webpage content in preparation for Bibliographers' Toolkit
- Review criteria for Rush Order stream

Budget, Finance & Statistics

- Develop a comprehensive working calendar for budget, financial & statistics that identifies report needs, information sources, deadlines and staff
- Update documentation related to statistics, fund reports & review files
- Develop supplies budget for Acquisitions to better monitor spending
- Meet with Accounts Payable staff to improve understanding of related workflows

Committees and Working Groups

- Participate in Committees and Working Groups in support of library goals, including the following special projects:
 - Investigation & implementation of Electronic Resources Module (ERM)
 - Development & implementation of Webfeat / Search 360
 - Development & implementation of Thomson ISI Journal Use Reports
 - Development & implementation of Bibliographer's Toolkit
 - Implementations of Marc 21 Holdings Standards as these apply to Acquisitions; with a particular focus on holdings format for multi-parts

Communication, Teams and Staff Wellness

- Continue to improve and foster a supportive & collaborative environment where everyone's contributions are valued, encouraged and respected.
- Foster commitment to personal responsibility, teamwork and customer service
- Arrange a department-wide workshop to support communication goals
- Improve ergonomics, productivity and comfort by implementing workspace enhancements as budget allows

Planning & Development

- Work with new Associate Librarian for Information Management, Elizabeth Kirk, to assess department needs and priorities
- Work with new Digital Resources Coordinator, Barbara DeFelice, to assess needs, review staff resources and coordinate workflows
- Continue reorganization & staff resources assessment due to staff changes
- Develop benchmarks to help assess each individual unique set of job assignments for balance, scope and complexity
- Prioritize department policies, programs and procedures awaiting review
- Improve department planning & assessment process, including semi-annual AMT retreats and process for input from department staff and teams
- Explore options for redesign of Acquisitions web pages

Policies, Procedures & Workflow

- Work with Digital Libraries Technologies & Services to develop supportable database for tracking Print to Digital Transitions, Cancellations and Transfers
- Review daily priorities list and turnaround time policies & expectations
- Review policies related to staff schedules, timesheets and time management
- Integrate Korean materials ordering and processing into staff liaison program
- Continue implementation of new Amateurs Approval plan and processes
- Expand Digital Acquisitions Team
- Reassess liaison & major vendor representative responsibilities
- Reassess claims procedures & determine needs and priorities

Staff Development & Training

- Develop and cross-train foreign approvals team
- Develop procedures to track and evaluate individual training progress
- Identify off-campus supervisory workshop for new supervisors

Vendor Relations

- Develop guidelines for assessing vendor services

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