Dartmouth College Library
Acquisition Services

Executive Summary

Change and transition remain the dominant themes in Acquisitions Services as we continue to assess and realign workflow and resources to meet shifting demands and technologies. Four significant changes occurred this year:

1) Arrival of two new Associate Librarians in the Fall of 2006, which included a reorganization of reporting lines.
2) New Director of Digital Resources position (Barbara DeFelice, former head of Kresge Library), who also reports to Elizabeth Kirk, and who became an important new partner to Acquisitions for the selection, licensing and management of digital resources.
3) Preparation for OASIS; given the size of the library budget and the complex fund structure for collections, this has a decided impact on our department operations.
4) Initiation of a Vendor Consolidation Project to combine US, Canadian, and UK approvals, standing orders and firm orders with one vendor; goals include: a) improve ease and efficiency; b) reduce costs; c) redeploy saved staff time to other needed areas, such as digital resources.

Other highlights include:

1) Assumed management for bibliographic utilities financial transactions and procurement cards for Baker ILL, Feldberg ILL and Jones Media.
2) $16,160.69 returned to the materials budget from AMBF receipts.
3) Digital resources workflow, maintenance, & projects continue to demand time in excess of available staff resources.
4) Implementation of EDIFACT for electronic invoicing to support the transition to 13-digit ISBN.
5) Implemented MARC holdings format for multi-parts, including subscriptions and complete sets.
6) Identified Korean vendors for new Korean collection.
7) Joined Better World Books’ Discards & Donations Program.
8) Key Statistics: Ordered > 34,000 titles; Cataloged > 15,000 titles. Orders down 5%; Rush orders down 17%; Serial issues checked in down 6% (9% from FY05).
9) Negotiated a settlement contact with Thomson Financial for long-standing account problems; settles all products, services and financial obligations through June 30, 2007.

Key Issues Looking Ahead:

1) Implementation of OASIS and workflow changes to take advantage of improved reporting activities.
2) Implementation of Vendor Consolidation Project and redefining related workflows.
3) Continued need to expand training in digital resource workflows.
4) Need for advanced specialist positions and other career ladders for non-exempt staff.
5) Need to explore possibility of consolidating vendors for digital resources to improve efficiency & service.

Special Thanks: COLOR! A priceless investment indeed! Our windowless walls changed from a dreary gray to a sunny lemon sorbet, which lifted the hearts, minds and spirits of all your hardworking Acquisitions staff. Thank you!

Respectfully submitted on behalf of all Acquisitions Services staff,

Judy Maynes, Head of Acquisitions Services
July 25, 2007
Acquisitions Services
Expanded Highlights for FY 2007

Acquisitions Staff Resources, Staff Development, and Reorganization

Reorganization:
- Two new Associate Librarians were hired in the Fall of 2006 pending John James’ retirement and the three former collection development units reporting to John were restructured: 1) Elizabeth Kirk, AL for Information Resources (Acquisitions and Director of Digital Resources); and 2) David Seaman, AL for Information Services (Cataloging & Metadata, Preservation, and Digital Technologies).
- July 2007, Barbara DeFelice became Director of Digital Resources & works closely with Acquisitions

Staff Resources:
- Lori Heath hired as Acquisitions Assistant, FT: September 2007
- Lisa Leonard hired as Acquisitions Assistant, PT (20 hrs) September 2007; Resigned March 2007
- Re-opened 20-hour part-time position in June 2007; anticipate August/Sept 2007 start date.
- One FT Acquisitions Assistant out on medical leave for 12 weeks.
- Student help was intermittent this year; often unreliable about showing up for work.

Staff Development & Training:
- One Acquisitions Assistant attended the SALALM Conference (Seminar on the Acquisition of Latin American Library Materials).
- Two Acquisitions Assistants completed the “Fundamentals of Acquisitions” web course offered by ALCTS (Association for Library Collections & Technical Services – A division of the American Library Association).
- Two department supervisors attended an off-campus two-day training for new supervisors.
- Exempt staff attended: Charleston Conference, ALA Midwinter, and NASIG.

Acquisitions Department Administration
- Initiated three-month training review for new Acquisitions employees.
- Developed benchmarks for firm order check-in training.
- Implemented EDIFACT standards for electronic ordering to accommodate 13-digit ISBN.
- Implemented Millennium’s Approval Plan Interface for downloading approval invoices.
- Implemented electronic invoicing for Nardecchia’s standing order and serials invoices.
- Transferred bindery pickup in News Center and CPR back to Preservation.
- Updated the Acquisitions Services Mission Statement & Responsibilities for website.
- Updated department calendar to include Financial & Statistics activities.
- Updated Staff Work Schedule Policy.

Acquisitions & Collection Development Support
- Worked closely with new AL for Information Resources, Elizabeth Kirk, to review priorities.
- Initiated a Vendor Consolidation Project to consolidate US, Canadian and UK approvals, firm and standing orders. RFPs were sent to 3 major vendors, a selection committee formed to review.
- Established a French Approval plan with Amateurs; and Art Approval Plan with Erasmus.
- Completed a full review of the Worldwide Art Approval Plan, Profile & Services.
- Worked with Romance Language Bibliographer to review and improve foreign approval plans & procedures.
- Piloted a New-Bibliographer Orientation Program with Kresge Librarians.
- Introduced an Orientation for Bibliographers on Acquisitions Records & Workflows.
- Transferred input of select Chinese orders to Cat-Met staff to improve efficiency due to unique order arrangements.
- New guidelines drafted for bibliographers: “Getting Millennium Data through the Online Catalog, the Web, and Lists/Reports”.
Provided additional financial information & reports to bibliographers regarding approval and standing order spending to help facilitate budget management.

Conducted full review of irregular titles and reorganized procedures (Trigger Files).

Updated Bibliographer Ordering Profile document for use by Acquisitions liaisons.

**Alumni Memorial Books Program, Gifts & Public Programs**

- $16,160.69 credited to materials budget from AMBF; 336 Alumni memorialized
- Planned exhibit of the AMBF Program scheduled for 2008.
- Discovered that AMBF bookplates had been removed at rebinding. Worked with Preservation to review procedures to remedy; Acquisitions will complete a retrospective re-labeling project.
- $3,700.00 credited to materials budget from miscellaneous financial gifts.
- Received 8 miscellaneous and gift-in-kind donations; Received 84 materials gifts.
- Reviewed alumni and gift procedures with Library main office.
- Met with Gift Recording and Donor Engagement & Stewardship staff to improve communication and to facilitate referrals.
- Updated Gift Procedures & Policy Procedures (cooperative project with Heads of Cataloging & Metadata and Preservation Services).
- Established Gifts Processing Room in Lower Level of Berry
- Helped develop Senior Bookplate Program for the library’s student employees.

**Cataloging & Serials Records Maintenance**

- Cataloging decreased by 4% from FY06.
- Implemented MARC holdings format for multi-parts, including ongoing subscriptions and complete sets.
- Serials Maintenance consisted of 2076 transactions, up 60% from FY06, but still a drop of 19% from FY05; largest categories: discards, transfers and updates, with cancellations not far behind.
- Serials Solutions Maintenance continues to increase as part of the digital workflow.

**Digital Resources Management**

- New Director of Digital Resources: worked closely with Barbara DeFelice to review procedures & coordinate priorities and projects with Acquisitions.
- Digital Team: accelerated training for the digital team due to an expanding workload. Immediate goal is to redeploy 35 staff hours to digital. This will, however, leave other workflows with inadequate staff resources.
- Digital Projects: Digital Specialist played a significant role in the development and implementation of Search360 (Webfeat); the development of ISI’s Journal Use Reports; and, Scholarly Stats.
- Tools: updated the Print-to-Digital Transition Database to include serials cancellations for improved tracking.
- ERM: worked with Director of Digital Resources and CatMet Staff to test ERM as an aid for managing offers and trials information.

**Facilities:**

- **COLOR!** Acquisitions changed from a dreary gray to a sunny lemon sorbet, which lifted the spirits of many hardworking employees in ways that are indeed priceless. *Thank you!*
- Not granted funding for cubical ‘stackers’ to improve noise and privacy; requested again for FY08.

**Financial Operations**

- OASIS: preparation required significant time and contributions from our Financial Specialist.
- P-Cards: management of P-Cards for Baker ILL, Feldberg ILL and Jones moved to Acquisitions.
- Bibliographic Utilities: financial transactions management moved to Acquisitions and records were created in Millennium to improve monitoring and budget planning.
- Supplies: drafted supply budget to better monitor and control spending.
- Budget FY2008: worked with Elizabeth Kirk to explore changes for FY08 budget and funds.
Statistical Highlights

- Ordering down 5% compared with last year, yet still higher than FY05; the only category higher is approval orders (before the counting change). With FY07, approval slips are counted as “firm orders,” since they are ordered individually. We believe this gives more accurate picture of the ordering workload, since true approvals are not as time-consuming as firm orders.
- Rush orders down 17% from FY06, yet higher than FY05.
- Serial issues checked in are down 6% from FY06 and 9% from FY05 years ago. Given the number of titles that have been converted to digital only, this is a surprisingly low result, reflecting a significant time lag from the point of initiation and receipt of the last print issue in the subscriptions.

Vendor Relations

- Korean Collection: established accounts with Korean vendors to support new collection.
- Better World Books: joined Better World Books’ Library Discard & Donations Program, with donations to World Fund, which was founded by Luanne Zurlo, Dartmouth Class of ’87.
- Thomson Financial: negotiated a signed settlement contact for long-standing account problems.
- Proquest: consolidated subscriptions to a common renewal date for better account management.
- Vendor Visits to review accounts & services: Blackwell Books, Casalini, Coutts, Ebsco Publishing, Ebsco Subscription Services, Erasmus, Midwest, Proquest, Sage, Swets, Worldwide, and YBP.

Appendices Attached:

I. Mission and Organizational Chart  
II. Staff List  
III. Participation on Library Committees, Forums, Working Groups & Projects  
IV. Staff Development Activities  
V. Ordering Statistics FY07  
VI. Selected Statistics: 9-Year Comparison  
VII. Goals for FY2008
Appendix I: Acquisitions Services – Mission & Organizational Chart

<table>
<thead>
<tr>
<th>Acquisitions Services Mission</th>
</tr>
</thead>
<tbody>
<tr>
<td>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.</td>
</tr>
</tbody>
</table>

Acquisitions Services Organizational Chart

<table>
<thead>
<tr>
<th>James Wright</th>
<th>President</th>
</tr>
</thead>
<tbody>
<tr>
<td>Barry Scherr</td>
<td>Provost</td>
</tr>
<tr>
<td>Jeff Horrell</td>
<td>Dean of Libraries and Librarian of the College</td>
</tr>
<tr>
<td>Elizabeth Kirk</td>
<td>Associate Librarian for Information Resources</td>
</tr>
</tbody>
</table>

Judy Maynes
Head of Acquisitions Services

<table>
<thead>
<tr>
<th>Carol Magenau</th>
<th>Julie McIntyre</th>
<th>Kathy Walker</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assistant Acquisitions Services Librarian</td>
<td>Acquisitions Supervisor</td>
<td>Acquisitions Supervisor</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Cheryl Burns</th>
<th>Alex Braman</th>
<th>Karen Welch</th>
<th>Barbara Sterling</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vendor Specialist</td>
<td>Acquisitions Assistant</td>
<td>Acquisitions Assistant</td>
<td>Acquisitions Assistant</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Donna Abbott</th>
<th>Bobbie Anderson Gilbert</th>
<th>Lori Heath</th>
<th>Becky Torrey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Continuing Resources Specialist</td>
<td>Acquisitions Assistant</td>
<td>Acquisitions Assistant</td>
<td>Digital Resources Specialist</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Karla Bushway</th>
<th>Goodie Corriveau</th>
<th>Susan Caruso</th>
<th>Kathy O’Neill</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acquisitions Assistant</td>
<td>Acquisitions Assistant</td>
<td>Acquisitions Assistant</td>
<td>Financial Management Specialist</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Marianne Densmore</th>
<th>Jan Peltzer</th>
<th>Suzette Fegan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acquisitions Assistant</td>
<td>Acquisitions Assistant</td>
<td>Acquisitions Assistant</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tricia Frazer</th>
<th>Open Position</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acquisitions Assistant</td>
<td>Acquisitions Assistant (part-time)</td>
</tr>
</tbody>
</table>
### Acquisitions Services Staff List as of June 30, 2007

<table>
<thead>
<tr>
<th>Staff Member</th>
<th>Hours</th>
<th>Title</th>
<th>Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abbott, Donna M</td>
<td>37.5</td>
<td>Acq Spec - Bibliographic Control</td>
<td>DRM A</td>
</tr>
<tr>
<td>Braman, Alexander</td>
<td>37.5</td>
<td>Acquisitions Assistant II</td>
<td>AAT C</td>
</tr>
<tr>
<td>Burns, Cheryl L</td>
<td>37.5</td>
<td>Acq Spec - Vendor Relations</td>
<td>DRM A</td>
</tr>
<tr>
<td>Bushway, Karla E</td>
<td>37.5</td>
<td>Acquisitions Assistant II</td>
<td>AAT C</td>
</tr>
<tr>
<td>Caruso, Susan A</td>
<td>37.5</td>
<td>Acquisitions Assistant II</td>
<td>AAT C</td>
</tr>
<tr>
<td>Corriveau, Miriam J</td>
<td>37.5</td>
<td>Acquisitions Assistant II</td>
<td>AAT C</td>
</tr>
<tr>
<td>Densmore, Marianne L</td>
<td>37.5</td>
<td>Acquisitions Assistant II</td>
<td>AAT C</td>
</tr>
<tr>
<td>Fegan, Suzette K</td>
<td>37.5</td>
<td>Acquisitions Assistant II</td>
<td>AAT C</td>
</tr>
<tr>
<td>Frazer, Patricia</td>
<td>37.5</td>
<td>Acquisitions Assistant II</td>
<td>AAT C</td>
</tr>
<tr>
<td>Gilbert, Roberta A</td>
<td>37.5</td>
<td>Acquisitions Assistant II</td>
<td>AAT C</td>
</tr>
<tr>
<td>Heath, Lori A</td>
<td>37.5</td>
<td>Acquisitions Assistant II</td>
<td>AAT C</td>
</tr>
<tr>
<td>Open – Part Time</td>
<td>20</td>
<td>Acquisitions Assistant I</td>
<td>AAT B</td>
</tr>
<tr>
<td>McIntyre, Julie P</td>
<td>37.5</td>
<td>Acquisitions Services Supervisor</td>
<td>DRM B</td>
</tr>
<tr>
<td>O'Neill, Kathleen E</td>
<td>37.5</td>
<td>Acq Spec - Financial Management</td>
<td>DRM B</td>
</tr>
<tr>
<td>Peltzer, Jan E</td>
<td>37.5</td>
<td>Acquisitions Assistant II *</td>
<td>AAT C</td>
</tr>
<tr>
<td>Sterling, Barbara W</td>
<td>37.5</td>
<td>Acquisitions Assistant II</td>
<td>AAT C</td>
</tr>
<tr>
<td>Torrey, Rebecca M</td>
<td>37.5</td>
<td>Acq Spec - Digital Resources</td>
<td>DRM A</td>
</tr>
<tr>
<td>Walker, Kathleen A</td>
<td>37.5</td>
<td>Acquisitions Services Supervisor</td>
<td>DRM B</td>
</tr>
<tr>
<td>Welch, Karen J</td>
<td>37.5</td>
<td>Acquisitions Assistant II</td>
<td>AAT C</td>
</tr>
<tr>
<td><strong>Exempt Salary</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Magenau, Carol</td>
<td>12 mo</td>
<td>Acquisitions Services Librarian</td>
<td>LP III</td>
</tr>
<tr>
<td>Maynes, Judy</td>
<td>12 mo</td>
<td>Head of Acquisitions Services</td>
<td>LP II</td>
</tr>
</tbody>
</table>

* Promotion finalized July 2007.
Appendix: III: Acquisitions Staff Participation on Library Committees, Forums, Working Groups & Projects

Library Committees, Forums, Working Groups & Projects – FY07

Committees
Cataloging Roundtable (CRT)
Collection Management Planning Group (CMPG)
Collection Services Management Group (CMPG)
DCLSA: Program Chair, Welfare Chair, Social Committee, Dept. Liaison
First-Year Open House Planning Committee
Library Assessment Committee
Library Catalog Advisory Committee (LCAC)
Library Management Group (LMG)
Library Self-Study Committee
Marketing & Communications Committee (MCC)
Preservation, Acquisitions and Cataloging & Metadata Committee (PACC)
Search Committee: Director of Management Services
Staff Development Committee (SDC)
Sustainability Committee
Thomson ISI Journal Use Reports Product Development Committee

Forums
Collection Development Forum
Collection Services Round Table (CSRT)
FastCat Forums
Provost Division Fiscal Officers and Fiscal Support
TeCOR

Projects & Working Groups
Acquisitions/ CatMet Working Group
Article Linker Support Team
Chinese Deposit Account Coding Cleanup Project
Collection Services Dept Heads (CSDH)
ERM: Trials and Offers Subgroup
Holdings Standards Working Group
Holdings Working Group and Holdings Export Taskforce
Label Processing Working Group
Record Deletes Working Group
Senior Bookplate Program Planning Group
Serials Group
Serials Maintenance Group
Serials Solutions Task Force
Vendor Consolidation Project Team

Other
United Way Representative for Acquisitions Services
Appendix IV: Staff Development Activities

Staff Development Activities - FY07

ALA Midwinter Meeting: Seattle, WA
ALECTS course (online): Fundamentals of Acquisitions
ARL Program: “Making Library Assessment Work”
Awareness Enrichment: our collective strengths
Blitz mail, Oracle Calendar and other basic Dartmouth computing skills
Charleston Conference on Acquisitions
CITE Workshop: People Are Talking
Communication Workshop with Jim Platt
Conducting Performance Evaluations (HR)
"Desperate How’s/Whys? Remaining Collaborative in a Stressful World” by Jim Platt
Do you know how to keep your mouth shut (Workshop)
Effective coaching [sound recording] with Michael Angelo Caruso.
IFLA Post-Conference Presentation by John DeSantis
Internal Control Project Audit
Introduction to RefWorks
Letterpress Printed Work from the Hamilton Wood Type & Print Museum (Richard Zauft)
Luncheon Learn: Library Staff Wiki
Luncheon Learn: The Deep Dive (brainstorming)
MARC 21 Holdings training
Mass Communication for the Masses: The Power of Weblogs (panel discussion)
Management Skills for First Time Supervisors
NASIG
New Hampshire Federal and State Depository Libraries Group
OASIS: Journal Entries in the Oracle General Ledger
OASIS: Journaling in Oracle Grants Accounting
OASIS: Working in the OASIS Financial Environment
OASIS: Working with the New Chart of Accounts
Portico presentation
SALALM (52nd Annual) (Seminar on Acquisition of Latin American Library Materials) Conference, Albuquerque NM
Search 360 Session
Seven Habits of Highly Effective People
Shift Happens: Dartmouth Sustainability (Jim Merkel)
Smart Searching on the Web
Spirituality in the Workplace
Spooky Treasures at Rauner
Spotlights: Jones Media, Digital Library Technologies Group, Education & Outreach, Rauner, Sherman, Storage Library
Support Staff Conference (4th Annual)
Swetswise Webinar
The power of persuasion [sound recording] / with Jordan Davis.
Twiki Lunch & Learn
Webcast Coaching your employees (Sirsi-Dynix?)

WORD II
## Appendix V: Ordering Activity FY07

### ORDERING ACTIVITY For FY: 06/07

<table>
<thead>
<tr>
<th>July</th>
<th>Aug</th>
<th>Sept</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>June</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>1874</td>
<td>1797</td>
<td>1558</td>
<td>1522</td>
<td>2021</td>
<td>1250</td>
<td>2412</td>
<td>1720</td>
<td>1961</td>
<td>1526</td>
<td>1343</td>
<td>594</td>
<td>19578</td>
</tr>
<tr>
<td>1277</td>
<td>1331</td>
<td>1089</td>
<td>1067</td>
<td>1483</td>
<td>936</td>
<td>1668</td>
<td>1223</td>
<td>1651</td>
<td>1135</td>
<td>943</td>
<td>589</td>
<td>14392</td>
</tr>
<tr>
<td>597</td>
<td>466</td>
<td>469</td>
<td>455</td>
<td>538</td>
<td>314</td>
<td>744</td>
<td>497</td>
<td>310</td>
<td>391</td>
<td>400</td>
<td>5</td>
<td>5186</td>
</tr>
<tr>
<td>967</td>
<td>1165</td>
<td>693</td>
<td>803</td>
<td>1121</td>
<td>613</td>
<td>1111</td>
<td>1083</td>
<td>1057</td>
<td>885</td>
<td>908</td>
<td>598</td>
<td>11004</td>
</tr>
<tr>
<td>50</td>
<td>79</td>
<td>53</td>
<td>68</td>
<td>87</td>
<td>34</td>
<td>54</td>
<td>95</td>
<td>48</td>
<td>92</td>
<td>60</td>
<td>765</td>
<td></td>
</tr>
<tr>
<td>151</td>
<td>230</td>
<td>177</td>
<td>198</td>
<td>89</td>
<td>133</td>
<td>171</td>
<td>165</td>
<td>132</td>
<td>192</td>
<td>195</td>
<td>227</td>
<td>2060</td>
</tr>
<tr>
<td>0</td>
<td>9</td>
<td>13</td>
<td>0</td>
<td>2</td>
<td>8</td>
<td>18</td>
<td>2</td>
<td>19</td>
<td>4</td>
<td>2</td>
<td>79</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>15</td>
<td>2</td>
<td>1</td>
<td>15</td>
<td>4</td>
<td>20</td>
<td>40</td>
<td>35</td>
<td>15</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>0</td>
<td>4</td>
<td>4</td>
<td>2</td>
<td>2</td>
<td>0</td>
<td>1</td>
<td>1</td>
<td>2</td>
<td>1</td>
<td>1</td>
<td>17</td>
<td></td>
</tr>
<tr>
<td>89</td>
<td>56</td>
<td>89</td>
<td>43</td>
<td>36</td>
<td>34</td>
<td>71</td>
<td>49</td>
<td>42</td>
<td>44</td>
<td>91</td>
<td>70</td>
<td>714</td>
</tr>
<tr>
<td>89</td>
<td>56</td>
<td>89</td>
<td>43</td>
<td>36</td>
<td>34</td>
<td>71</td>
<td>49</td>
<td>42</td>
<td>44</td>
<td>91</td>
<td>70</td>
<td>714</td>
</tr>
</tbody>
</table>

*Starting FY07 we decided to count approval slips with firm orders; FY07/08 firm orders will include slips*

### CATALOGING ACTIVITY

| Monographs | 1092 | 1621 | 1180 | 1324 | 1198 | 866  | 1850 | 1208 | 1568 | 1154 | 1211 | 961  | 15233 |
| Serials    | 14   | 7    | 8    | 9    | 21   | 9    | 9    | 19   | 9    | 2    | 11   | 9    | 127   |
| Scores     | 2    | 0    | 2    | 2    | 1    | 3    | 0    | 0    | 0    | 1    | 0    | 2    | 13    |
| Maps       | 1    | 2    | 1    | 0    | 1    | 1    | 2    | 1    | 2    | 1    | 0    | 0    | 12    |
| Computer files | 0  | 0   | 0    | 0    | 0    | 0    | 0    | 0    | 0    | 0    | 0    | 0    | 0    |
| TOTAL cataloging | 1109 | 1630 | 1191 | 1335 | 1221 | 879  | 1861 | 1228 | 1579 | 1158 | 1222 | 972  | 15385 |
### Appendix VI: Selected Statistics: 9-Year Comparison (FY 1998 to FY 2007)

<table>
<thead>
<tr>
<th>Ordering Activity</th>
<th>FY98</th>
<th>FY99</th>
<th>FY00</th>
<th>FY01</th>
<th>FY02</th>
<th>FY03</th>
<th>FY04</th>
<th>FY05</th>
<th>FY06</th>
<th>FY07</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monographic orders created</td>
<td>25,652</td>
<td>30,502</td>
<td>31,793</td>
<td>33,510</td>
<td>36,012</td>
<td>29,949</td>
<td>32,037</td>
<td>32,051</td>
<td>35,855</td>
<td>34,027</td>
</tr>
<tr>
<td>Firm orders</td>
<td>11,155</td>
<td>18,446</td>
<td>19,975</td>
<td>19,690</td>
<td>18,628</td>
<td>12,882</td>
<td>13,046</td>
<td>13,995</td>
<td>15,242</td>
<td>19,578#</td>
</tr>
<tr>
<td>Approvals</td>
<td>7,978</td>
<td>8,375</td>
<td>8,649</td>
<td>10,236</td>
<td>13,443</td>
<td>13,041</td>
<td>15,116</td>
<td>14,522</td>
<td>16,572</td>
<td>5,186#</td>
</tr>
<tr>
<td>BLSO items</td>
<td>749</td>
<td>1,004</td>
<td>515</td>
<td>921</td>
<td>1,024</td>
<td>1,030</td>
<td>949</td>
<td>781</td>
<td>1,036</td>
<td>765</td>
</tr>
<tr>
<td>Books in series</td>
<td>1,622</td>
<td>1,732</td>
<td>1,814</td>
<td>2,021</td>
<td>2,145</td>
<td>2,111</td>
<td>2,256</td>
<td>2,107</td>
<td>2,318</td>
<td>2,060</td>
</tr>
<tr>
<td>Class dups</td>
<td>530</td>
<td>148</td>
<td>67</td>
<td>164</td>
<td>318</td>
<td>112</td>
<td>68</td>
<td>95</td>
<td>60</td>
<td>79</td>
</tr>
<tr>
<td>Multipart</td>
<td>1,622</td>
<td>1,732</td>
<td>1,814</td>
<td>2,021</td>
<td>2,145</td>
<td>2,111</td>
<td>2,256</td>
<td>2,107</td>
<td>2,318</td>
<td>2,060</td>
</tr>
<tr>
<td>Replacements</td>
<td>285</td>
<td>214</td>
<td>473</td>
<td>58</td>
<td>177</td>
<td>265</td>
<td>445</td>
<td>39</td>
<td>12</td>
<td>18</td>
</tr>
<tr>
<td>RUSH orders</td>
<td>1,416</td>
<td>1,027</td>
<td>1,664</td>
<td>1,786</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Serial orders created</td>
<td>3,038</td>
<td>1,481*</td>
<td>1,726</td>
<td>1,450</td>
<td>1,386</td>
<td>1,784</td>
<td>1,088</td>
<td>1,045</td>
<td>734</td>
<td>714</td>
</tr>
<tr>
<td>Special categories: (both mono &amp; serial)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Replacements</td>
<td>308</td>
<td>380</td>
<td>473</td>
<td>295</td>
<td>264</td>
<td>310</td>
<td>430</td>
<td>371</td>
<td></td>
<td></td>
</tr>
<tr>
<td>RUSH</td>
<td>956</td>
<td>1,175</td>
<td>1,220</td>
<td>895</td>
<td>729</td>
<td>826</td>
<td>1,235</td>
<td>1,026</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gift</td>
<td>1,560</td>
<td>1,217</td>
<td>2,089</td>
<td>2,219</td>
<td>1,930</td>
<td>1,334</td>
<td>1,370</td>
<td>2,029</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gifts no order</td>
<td>377</td>
<td>423</td>
<td>34</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Digital</td>
<td>664</td>
<td>802</td>
<td>759</td>
<td>1,400</td>
<td>656</td>
<td>685</td>
<td>394</td>
<td>454</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resources</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Videos/DVDs</td>
<td>1,127</td>
<td>976</td>
<td>1,117</td>
<td>1,362</td>
<td>1,681</td>
<td>1,695</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Orders created</td>
<td>30,354</td>
<td>31,983</td>
<td>33,519</td>
<td>35,340</td>
<td>37,398</td>
<td>31,733</td>
<td>33,125</td>
<td>33,096</td>
<td>36,589</td>
<td>34,741</td>
</tr>
</tbody>
</table>

### Cataloging Activity

<table>
<thead>
<tr>
<th>Activity</th>
<th>FY98</th>
<th>FY99</th>
<th>FY00</th>
<th>FY01</th>
<th>FY02</th>
<th>FY03</th>
<th>FY04</th>
<th>FY05</th>
<th>FY06</th>
<th>FY07</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monograph titles cataloged</td>
<td>17,194</td>
<td>17,766</td>
<td>19,560</td>
<td>16,805</td>
<td>16,987</td>
<td>12,878</td>
<td>12,430</td>
<td>13,133</td>
<td>15,800</td>
<td>15,233</td>
</tr>
<tr>
<td>Serial titles cataloged</td>
<td>420</td>
<td>184</td>
<td>494</td>
<td>452</td>
<td>655</td>
<td>602</td>
<td>198</td>
<td>156</td>
<td>169</td>
<td>127</td>
</tr>
<tr>
<td>Scores</td>
<td>203</td>
<td>254</td>
<td>225</td>
<td>38</td>
<td>7</td>
<td>9</td>
<td>7</td>
<td>5</td>
<td>5</td>
<td>13</td>
</tr>
<tr>
<td>Maps</td>
<td>24</td>
<td>7</td>
<td>16</td>
<td>12</td>
<td>18</td>
<td>12</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Computer Files</td>
<td>5</td>
<td>2</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total cataloging</td>
<td>17,817</td>
<td>18,204</td>
<td>20,279</td>
<td>17,299</td>
<td>17,678</td>
<td>13,498</td>
<td>12,651</td>
<td>13,308</td>
<td>15,992</td>
<td>15,385</td>
</tr>
</tbody>
</table>

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

#With FY07, counting approval slips with firm orders, since they are ordered individually.
Appendix VII: Acquisitions Goals for FY 2008 (with reference to Library Goals)

Acquisitions Services
FY 2008 Department Goals

Assessment (Library Goal #1)
- Contribute to the library’s self-study through the Self-Study Committee (#1a)
- Contribute to development of culture of assessment through participation in Library Assessment Committee (#1b, 1c)
- Contribute to the library’s goals relating to staff (#3b optimizing resources, #3a advancement opportunities for non-exempt staff) through the Staff Development Committee
- Complete a comprehensive working calendar for budget, financial & statistics that identifies report needs, information sources, deadlines and staff
- Develop a departmental supplies budget to better manage spending

Staff (Library Goal #3)
- Communication
  - Continue to foster a supportive & collaborative work environment where everyone’s contributions are valued, encouraged and respected; and a culture of personal responsibility, courteous and professional interactions, teamwork and high quality customer service.
- Fill open half-time position
- Training & Assessment
  - Improve training on review files and Excel for improved bibliographer support (#4b)
  - Redefine bibliographer liaison responsibilities to reflect collection development strategies (#4)
  - Cross-Train Foreign Approvals Team
  - Define responsibilities of both monograph & serial vendor liaisons & improve training
  - Review daily priorities list and turnaround time policies & expectations
  - Continue to pursue advanced Acquisitions Assistant & Specialists levels (#3a)
  - Continue to introduce and train staff on digital resources workflows
  - Improve productivity & privacy by adding workstation “stackers” as budget allows.
  - Further develop procedures to track and evaluate individual training progress

Information Resources & Services (Library Goal #4)
- Consolidate domestic approvals, firm and standing orders to increase staff efficiency and release time for improved bibliographer support (#4b), and to optimize use of financial resources.
- Continue to develop and update orientation materials for bibliographers regarding acquisitions-related functions (#4b)
- Develop a suite of reports & review files available; create procedures & training program for staff.
- Continue to develop New-Bibliographer Orientation Program
- Continue to update Acquisitions webpage content and organization.
- Continue work with Cataloging-Metadata & Preservation to improve department websites for improved interdepartmental information and transparency (#4b)
- Develop guidelines for assessing vendor services
- Reassess claims procedures & determine needs and priorities

College Initiatives & Priorities (Library Goal #7)
- Implement OASIS (#7d)
- Assist as appropriate with the implementation of a Library Donor Stewardship Program (#7b), and continue to develop communication and information sharing with other Alumni programs.
- Continue participation in Committees and Working Groups, including the following 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