**FY2010**

Judy Maynes, Head of Acquisitions Services

Dartmouth College Library

FY2010



*August 6, 2010*

Acquisitions Services Annual Report July 1, 2009 – June 30, 2010

**Acquisition Services FY2010 Annual Report**

**July 1, 2009 to June 30, 2010**

**Executive Summary**

Acquisitions Services provides central support services for collection development activities throughout the college library system. Services include management of the Information Resources and the Content Utilities budgets, vendor accounts and the licensing, purchase, receipt and payment of resources, as well as the provision of financial and collection statistics and reports. Each Acquisitions staff member makes unique and valuable contributions every day that directly support the scholarly resources and excellent library services that our patrons expect and receive as central to their Dartmouth experience.

In fiscal year 2010, the Library’s buying power for information resources was reduced by one-half million dollars. Acquisitions provided specialized expertise to successfully meet the financial and staff resource challenges, supporting the library administration, selectors and other managers though efficient purchasing and report preparation, as well as evaluating price models, providing advice, and implementing cancellation projects to meet reduction targets.

**Key Highlights**

**Substantial reductions in the Information Resources budget** necessitated a close scrutiny of purchasing options, strategic negotiations and renegotiations by Elizabeth Kirk, Associate Librarian for Information Resources, and difficult cancellation decisions across the board. Most significantly, cuts were much closer to the bone and considered a permanent resetting of the base rather than a temporary hiatus.

**Increased purchasing efficiencies** by establishing new approval plans for foreign materials from China, France, Japan, Korea, and Spain; as well as through the implementation of a shared music approval plan in collaboration with other Borrow Direct Libraries.

**Increased valuable support and analysis** necessary for determining strategic budget allocation for library resources; support included provision of financial reports, collection and cost per use statistics, package plan analysis, and increased monitoring of spending patterns.

**Joined the Compact for Open Access Publishing Equity (COPE)** in September 2009, to support article processing fees for faculty and graduate students publishing in open access journals.

**Statistical Highlights**

**FY2010 Information Resources and Content Utility Budgets:**

* $ 9,507,234 Information Resources and $166,147 for Content Utilities

**Orders, Cataloging and Maintenance** (see Appendix V)

* Orders decreased overall 18% (totaling 30, 970), similar to FY07 and FY08 levels.
* Approvals increased 9%; firm orders declined 23%
* Serials, BLSOs, multiparts, and replacement orders each declined by 60% or more.
* 78% of the Information Resources budget now supports serials and databases
* 22% of the Information Resources budget supports monographic purchases.
* Spending for electronic formats increased 6% in FY10; up 10% from FY08.
  + 71% (FY10) ; 65% (FY09); 61% (FY08)
* Cataloging at receipt has declined 95% since the majority of this activity was consolidated with Cataloging & Metadata cataloging workflow in FY09.
* Maintenance activities increased, with records maintenance activities up 20%, and SerialsSolutions site maintenance activity up 24%.

**Income from Programs:**

* $16,019 credited to the Information Resources budget from Alumni Memorial Book Fund Program receipts
* $2,154 credited to the Information Resources budget from the 5613 lbs of books shipped to the Better World Books Library Discard & Donations Program**.**

**Looking Ahead**

Reduced financial resources necessitate strategic purchasing and value assessment. Vendors and publishers compete for limited academic dollars through a complex and dynamic array of packaged options, consortia deals and alternative price models. Decisions demand a robust structure for collection and cost analysis and valuation. Collaborative collection building with other Borrow Direct libraries and options such as CRL, JSTOR’s Current Scholarship Program, the Hathi Trust, continue to increase the potential for shared collections and preservation of access. In addition, serious consideration must be given to consolidating serial vendors, which appears to be the next essential management tool for reducing cost and streamlining internal workflow, particularly given limited staff and financial resources.

**Expanded Highlights and Appendices are attached**

Appendix I: Acquisitions Mission and Areas of Operation

Appendix II: Acquisitions Staff List

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Appendix VII: Vendor Account & Product Visits

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**Acquisitions Services**

**Expanded Highlights for FY 2010**

**Staff Resources, Staff Development and Training**

Acquisitions Services staff consists of 19.5 FTE including 1 exempt and 18.5 non-exempt staff members. Students provided 480 hours of valuable processing and project assistance.

**Staff Promotions in FY 2010:**

Sarah McBride: July 2009 - Acquisitions Assistant I to Acquisitions II

Timothy Wolfe: July 2009 - Acquisitions Assistant I to Acquisitions II

Judith Maynes: July 2009 - Librarian II to Librarian III

**Allocation of Staff Resources**

Shifting needs and priorities prompted workflow changes and the reallocation of staff resources on the following teams: Coutts Ratification, Rush Order, Order Revision, and Serials Check-in.

In addition, preparations were made to increase staff resources for digital resources by 22.5 hours per week effective July 1, 2010.

**National Conferences, Institutes, and Advisory Board Participation:**

* ALA Midwinter, Boston Ma., January 2010: Julie McIntyre and Barbara Sterling
* ALA Annual in Washington DC, June 2010: Judy Maynes
* Charleston Acquisitions Conference, November 2009: Rebecca Torrey.
* Coutts Advisory Board WebEx Meetings**,** Nov, 2009: Judy Maynes and Julie McIntyre
* Coutts Advisory Board Meeting, June 2010: Judy Maynes and Julie McIntyre
* Harvard Leadership Institute for Academic Librarians (LIAL), Aug. 2009: Judy Maynes

**Dartmouth College and Library Conferences Participation**

* PEAK Conference, Spring 2010
* E-Resources Fair, 2010
* Library’s Inspiring Ideas Conference

**Outreach & Education**

* Committees Open House , September 2009 (ERMIT-2 Committee)
* First Year Open House, September 2009, “Oh the Places you can Go!"
* The ERMIT-2 Committee provided an update to LMG, September 2009
* Presented the PACC produced video “*Picture This*” to the ASRT Group, February 2010.
* Participated in meetings with Peter Lund from Loughborough University in the UK; part of a two-week study visit to New England libraries, Sept. 2009.
* Created and presented a new Acquisitions Services power point at the New Staff Orientation, October 2009.
* Prepared data on annual access fees for a Collection Development Forum

**Collection Development & Vendor Relations**

**Eliminated $2400 in annual maintenance fees:** transitioned remaining vendor accounts from *BISAC* to *EDIFACT* format to for electronic invoicing, which reduced annual maintenance fees and overall processing time.

**Reduced order and processing time by changing our** **RUSH order vendor:** tookadvantage of Barnes & Noble’s academic invoicing program which eliminated the need to use a credit card.

**Increased efficiencies through approval plan changes & collaborations**

* Initiated a shared approval plan collection with other Borrow Direct Library for 20th & 21st Century Music Scores through Theodore Front.
* Updated all Coutts approval profiles & established annual spend limits.
* Initiated approval plans and established annual spend limits for:
  + Aux Amateurs: French Literature
  + Iberoamericana: Literature -Spain (from purchase to approval plan)
  + Iberoamericana: Social Sciences - Spain (from purchase to approval plan)

**Increased efficiencies for purchasing Chinese, Korean, and Japanese materials:** worked closely with the Asian bibliographer to review accounts and purchasing procedures:

* Coordinated a bulk purchase for Korean materials through Panmun following a review by the Korean collection consultant.
* Initiated quarterly wire transfers to Beijing Rare Books to eliminate lost checks.
* Established a Japanese literature approval plan with Japan Publications Trading Company.
* Established a literature slips plan with Chinese International Book Trading Corp. (CIBT).

**Increased control over standing order expenditures:** completed preparations to remove the majority of standing order titles from the serials budget and selectively purchase individual volumes as firm orders within the monograph budget. This improves our ability to predict annual serials expenditures.  **(**Baker & Taylor’s acquisition of Blackwell North America prompted the cancellation of 1360 standing orders. Following a full review, 66% will be closed out as subscriptions. 34% will be reordered through Coutts in FY11 as standing orders.)

**Continued cancellation and de-accessioning projects**

* Worked closely with Director of Digital Resources & AUL to review electronic databases for cancellation to meet budget reductions in FY11.
* Continued the JSTOR discard and Deaccessing Projects to alleviate space and meet budget reductions for binding.

**Additional Processing Statistics**

* Resolved 146 digital access problems (approximately 12 per month).
* Processed 496 subscription cancelations or transition to digital format.
* Responded to an estimated 3700 inquiries addressed to our general acquisitions mailbox
* Managed 322 vendor accounts in FY10

**Financial & Statistics Support**

* Resumed ordering for FY10 on July 1 and invoice processing on August 19, 2010.
* Implemented new counting procedures for collection statistics, realigning count-in and count-out methods to address impact of a significantly reduced binding budget.
* Held financial educational sessions with Bibliographers and Acquisitions Liaisons to review subject allocations and funds including reserves and endowment restrictions.
* Met new ARL statistics deadline which suddenly changed from January to October.
* Assumed responsibility for managing and monitoring the Content Utilities budget in Millennium in FY10.

**Systems Administration to Support Collection Development Decisions**

* Updated information for usage statistics administration and integration for systems such as ERM, including coordinating SUSHI feeds from COUNTER3 compliant publishers.
* Increased time spent on data management for administrative settings in electronic databases and platforms, including setting up a mobile device option from EBSCO, setting up full text links in Web of Knowledge, and setting different defaults in databases in response to changing options available from the vendors and publishers.
* Addressed a complicated set of problems with the ProQuest Alumni Databasesthat caused us not to have access until September 2009, resulting in ProQuest investigating how different platforms handle Shibboleth and new ways to provide access to alumni.
* Extensive work was done to set up Shibboleth authentications for as many providers as possible; included working with Eric Bivona, DLTG.

**Cross-Department Collaborations:**

* Created detailed workflow specifications and worked with programmer, Paul Merchant, to rebuild the database used to manage subscription changes. Completion of the project was delayed due to unplanned staff reductions in DLTG.
* Acquisitions and Preservation staff established workflow procedures for archival files.
* Acquisitions and Cataloging & Metadata staff streamlined processing and cataloging workflows for standing orders and multi-part formats.
* Through PACC, restructured and recharged the Collection Services Roundtable; and proposed elimination goals designed to streamline and speed processing time.
* Through ERMIT-2, extensive work was completed to further implementation of Innovative’s Electronic Resources Module, particularly in the areas of use statistics, license record data, and public display options.
* The Student Library Service Program honored sixty graduating students through the purchase of books each individually plated to honor their service to the library.

**Department Administration & Documentation**

* Updated our department emergency plans to include potential pandemics.
* Worked with Mary Childers, Ombudsperson, on a workshop for department supervisors on supervising friends & relations in the workplace.
* Wrote a *Summer Work Schedule Planning Guide* for Acquisition Team Planning
* Updated the *Digital Invoice Approval Guidelines* and *Year-End Digital Invoice Approval Guideline.*

**Alumni Memorial Book Fund Program (AMBF)**

In FY10 we upgraded to FileMaker Pro 9 and redesigned the database to streamline workflow and incorporate financial information. A retrospective review was completed to make sure that our class lists were accurate. We worked collaboratively with the Alumni Class Activities Office staff to assist classes planning for future memorials.

* 39 classes actively participate in the program, including 14 endowed classes
* $16,019.22 was credited to the Information Resources budget through AMBF receipts.
* 429 alumni class members memorialized
* The Class of 1966 joined the Alumni Memorial Books Program in FY10.
* Fully memorialized: Class of 1920, 1923, 1924, and 1925.

**Financial Gifts Program: Memorial and Non-Memorial Gifts**

* Collaborated with Development to establish procedures and guidelines for the Robert C. Kolbe D1934 Memorial Fund, a book memorial fund to run through November 2010.
* $300 was credited to the Information Resources budget from gifts to the Memorial and Non-Memorial Financial Gifts Program.

**Better World Books Library Discards & Donations Program**

* $2,154.40 received in sales commissions and returned to information resources budget
* 5613 lbs (2.8 tons) of books shipped to Better World Books

**Library Collection Statistics**

* 2.85 million books
* 20,000 linear feet of manuscripts
* 175,000 maps
* 2.6 microforms
* 39,000 electronic journals
* 150,000 electronic books
* 1,000 electronic databases

**APPENDIX I: Acquisitions Mission & Areas of Operation**

# 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.

**To fulfill our mission, Acquisitions strives to:**

* Employ good accounting principles, maintain accurate records and effectively manage the materials budget and the financial information in Millennium
* Provide accurate statistical, fund and other management reports
* Periodically review policies and procedures to ensure effective and efficient services
* Develop strong working relationships with vendors, publishers, consortia and alumni
* Maintain strong cross-departmental working relationships with colleagues
* Seek out new technologies in support of our work
* Maintain a commitment to staff development & training

**General Areas of Operations Managed by Acquisitions:**

* Library Information Resources and Content Utilities budgets
* Purchase and receipt of library materials
* Approval plans, continuations, subscriptions and memberships
* Digital resources trials, license, lease, access and site administration
* Alumni Memorial Books Program (AMBF), Memorial and Non-Memorial Financial Gifts, and Gifts-In-Kind Programs
* Fund, statistical and other management reports
* Serials Cataloging and Records Maintenance

**Appendix II: Acquisitions Staff – FY 2010**

**Staff Roster**

Alexander, Braman Acquisitions Assistant II

Cheryl, Burns Acquisitions Specialist, Vendor Relations

Karla Bushway Acquisitions Assistant II

Susan Caruso Acquisitions Assistant II

Miriam Corriveau Acquisitions Assistant II

Marianne Densmore Acquisitions Assistant II

Suzette Fegan Acquisitions Assistant II

Roberta Gilbert Acquisitions Assistant II

Lori Heath Acquisitions Assistant II

Judith Maynes, Head of Acquisitions Services

Sarah EE McBride Acquisitions Assistant II (20 hours)

Julie P. McIntyre Acquisitions Services Supervisor

Kathleen E. O'Neill Acquisitions Specialist, Financial Management

Jan E. Peltzer Acquisitions Assistant II

Barbara W. Sterling Acquisitions Assistant II

Rebecca M. Torrey Acquisitions Specialist, Digital Resources

Donna Vinopal, Acquisitions Specialist, Continuing Resources

Kathleen A. Walker Acquisitions Services Supervisor

Karen J. Welch Acquisitions Assistant II

Timothy M F Wolfe Acquisitions Assistant II

**Staff Promotions in FY 2010: 3 staff members**

Sarah McBride: July 2009 - Acquisitions Assistant I to Acquisitions II

Timothy Wolfe: July 2009 - Acquisitions Assistant I to Acquisitions II

Judith Maynes: July 2009 - Librarian II to Librarian III

**Staff leaves of absence: 15 weeks**

Three staff leaves of absence

**Student Assistance 2010: 480 hours**

Leslie Lopez, Class of 2011

Xiaoxi Dai, Tuck 2010

Students provided 480 hours of valuable processing and project assistance, including: adding security strips to print journals, processing government documents, checking gift materials for duplicates, unpacking approval shipments, checking old orders for receipt, boxing invoices for transfer to records management, and stocking shared workstations, printers and copiers. In addition, students have provided valuable project assistance by working on an AMBF class lists retrospective inventory; a digital resources licensing inventory, and assisting with a Chinese materials orders project.

**APPENDIX III: Participation on Committees, Task Forces, Implementation Teams, and Working Groups**

|  |
| --- |
| **Committees, Implementation Teams & Forums** |
| Collection Development Forum |
| Collection Management Planning Group |
| Collection Management Planning Group (CMPG) |
| Collection Services Coordinators (CSC) |
| Collection Services Roundtable Meeting on Statistical Counting |
| Dartmouth College Library Staff Association: Program Committee |
| Electronic Resource Management Database Finder Group |
| Electronic Resource Management Implementation Team |
| Electronic Resource Management Stats Group |
| Library First Year Open House Planning Committee |
| Library Web Forum |
| Library Web Round Table |
| MARC21 Holdings Implementation Group |
| Marketing & Communications Committee |
| Material on Demand Pilot Project Committee |
| Preservation, Acquisitions, Cataloging Committee (PACC) |
| Save the Time of the Reader |
| Search360 Alumni Group |
| Serials Team |
| Student Supervisory Committee |
| Summon Admin Team |
| Sustainability Committee |
| TeCor |
| United Way |

**APPENDIX IV: Staff Development Activities**

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| --- |
| **Staff Development** |
| Artworks |
| Assessment Planning Workshop: Basic Statistics |
| Benefits Proposal Information Session |
| Blackboard class video training series |
| Coutts Audio books Webinar |
| Dr. Kim Dartmouth's Financials (2 different sessions) |
| Ethics of Green Building |
| Fire Safety Education |
| JSTOR Current Scholarship Program - Webinar |
| Kiewit-PKCS Open House- Crime ware |
| Microsoft Office |
| My Computer did what? |
| New look on Microsoft |
| NISO Webinar: eResources Preservation |
| NISO Webinar: Identifiers: new problems, New solutions |
| OASIS version IV training session |
| ONIX-PL webinar |
| Philosophers, Grave robbers and Anatomies: Medicine |
| Power Point |
| Power Sleep |
| Provider Neutral eBooks webinar |
| Preservation Book Repair |
| Resume & Cover Letter writing tips |
| Rudolph at 70 |
| Safety on Campus Active Shooter |
| Secret Life of the PowerPoint |
| Search 360 Webinar |
| Something has to give: How to assertively say no to people, places, and things |
| Webinar - "Access and Collections" |
|  |
| **Luncheon Learns** |
| Luncheon Learn : Architecture Students and the Berry Combined Desks |
| Luncheon Learns : BAW holiday card,; Monticello; Dartmouth’s Pow-Wow |
| Luncheon Learns : Poetry; Vietnam - Pictures and Stories |
| Luncheon Learn : architectural and social history of America in the Age of Jefferson |
|  |

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| **Staff Development Activities – Continued** |
| **Diversity** |
| Don Rains - 45 year old Native-American Dartmouth Student, reads from his writings and shares his story |
| Hood Museum of Art: Wabanaki Ash Splint Baskets from Maine, Tapis from Lampung, South Sumatra Indonesia, Art that lives? Exploring figural art from Africa |
| Institutional Diversity + Education - Traces of the Trade |
| Kwanzaa Celebration |
| Martin Luther King Jr. Day Employee Celebration Breakfast |
|  |
| **Staff Activities** |
| 4th Annual Dartmouth College Library Golf Tournament |
| After Daumier: Social Comment in Illustrations and Cartoons in the Early 20th Century |
| Art Department Professor Virginia Beahan, on photographing the people and landscapes of Cuba |
| Backstage Tour of the Hopkins Center |
| Ballet Folklorica : Random Act of Art |
| Barbary Coast Jazz Ensemble : Random Act of Art in Novack Café |
| Behind the Scenes: volunteering for local housing makeover |
| College Film - Shadow Land part of Summer Arts Workshop |
| Curators Tour: Animal Magnetism |
| Dartmouth Community Celebration, DCLSA |
| Dartmouth Haiti response team talk, DCLSA |
| Fall Employee Services Fair |
| Hitchcock Foundation Helmut Schumann Lecture |
| Hopkins Center Tribute to documentarian Frederick Wiseman |
| Inauguration of President Kim |
| James Dickey Center for International Understanding |
| Looking at Who You Are: Exploring Identity and Impact |
| Montgomery Fellow Jules Feiffer |
| Office of Alumni Affairs event: Theodor SEUSS Geisel |
| Poetry and Prose English Department Series |
| Presentation on Comics and Cartooning |
| President Kim Community Welcome, Friends of the Library |
| Special Address by President Jim Yong Kim |
| Staff breakfast to welcome President Jim Yong Kim |
| Strength in What Remains, Tracy Kidder |
| Tour of Campus Greenhouses |
| Tour of Simulation Lab at DHMC's Patient Safety Training Center |
| Typography in the Digital Age |
| World Music Percussion Ensemble : Random Act of Art in Novack Cafe |

**APPENDIX V: Ordering Statistics: Five-Year Summary Comparison**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | **FY06** | **FY07** | **FY08** | **FY09** | **FY10** | **% change** |
|  |  |  |  |  |  | FY09 to FY10 |
| **TOTAL ORDERS** | **36,569** | **28,923** | **33,833** | **37,633** | **30,970** | **-17.7%** |
|  |  |  |  |  |  |  |
| **Monographic** |  |  |  |  |  |  |
| Firm orders | 15,242 | 19,578 | 19,592 | 19,995 | 15,445 | **-22.8%** |
| Approvals | 16,572 | 5,186 | 10,536 | 12,084 | 13,189 | **9.1%** |
| BLSO items | 1,036 | 765 | 725 | 608 | 219 | **-64.0%** |
| Books in series | 2,318 | 2,060 | 1,620 | 1615 | 886 | **-45.1%** |
| Class dups | 60 | 79 | 35 | 20 | 31 | **55.0%** |
| Multiparts | 165 | 152 | 149 | 172 | 68 | **-60.5%** |
| Other | 12 | 18 | 8 | 43 | 23 | **-46.5%** |
| CJK |  |  |  | 522 | 351 | **-32.8%** |
| Repl. | 430 | 371 | 659 | 749 | 292 | **-61.0%** |
| **Total Mono Orders** | **35,835** | **28,209** | **33,324** | **35,808** | **30,504** | **-14.8%** |
|  |  |  |  |  |  |  |
| **Total Serial** | 734 | 714 | 509 | 1825 | 463 | **-74.6%** |
|  |  |  |  |  |  |  |
| **Total Orders** | 36,569 | 28,923 | 33,833 | 37,633 | 30,970 | **-17.7%** |
| **Average per month** | 3,047 | 2,410 | 2,819 | 3,136 | 2,581 | **-17.7%** |
|  |  |  |  |  |  |  |
| **Other orders** |  |  |  |  |  |  |
| RUSH | 1,235 | 1,026 | 803 | 615 | 678 | **10.2%** |
| Gift | 1,793 | 2,063 | 1,133 | 1478 | 1255 | **-15.1%** |
| Digital Resources | 394 | 454 | 387 | 1,652 | 386 | **-76.6%** |
| Videos/DVDs | 1,681 | 1,695 | 1,598 | 1,916 | 1,976 | **3.1%** |
| Kindle |  |  |  | 26 | 16 | **-38.5%** |
|  |  |  |  |  |  |  |
| **CATALOGED IN Acquisitions)** |  |  |  |  |  |  |
| Monographs | 15,800 | 15,233 | 14,190 | 7210 | 705 | **-90.2%** |
| Serial titles | 169 | 127 | 106 | 66 | 43 | **-34.8%** |
| Scores | 5 | 13 | 1 | 4 | 4 | **0.0%** |
| Maps | 18 | 12 | 6 | 4 | 0 | **-100.0%** |
| Computer Files | 0 | 0 | 0 | 0 | 0 |  |
| **All cataloging** | **15,992** | **15,385** | **14,303** | **7284** | **752** | **-89.7%** |
|  |  |  |  |  |  |  |
|  | | | | | | |

\*Monograph replacements include serials

#With FY07, counting approval slips with firm orders since they are ordered individually.

% The majority of cataloging upon receipt activities transferred to Cataloging & Metadata in FY09.

**APPENDIX VI: Records & SerialsSolutions Maintenance: Two-year Comparison**

|  |  |  |
| --- | --- | --- |
| **Record Maintenance Activities** | | |
|  | **FY 09** | **FY 10** |
| Added copy | 5 | 30 |
| Cancelled | 607 | 747 |
| Ceased | 112 | 138 |
| Discard | 157 | 450 |
| Holdings update | 468 | 587 |
| Inactive (new) | 26 | 21 |
| New titles | 95 | 52 |
| Recatalog | 3 | 0 |
| Reclass | 0 | 0 |
| Retrospective conversion | 1 | 0 |
| Title change (new) | 28 | 16 |
| Title change (old) | 32 | 17 |
| Transfer | 279 | 113 |
| Withdraw | 0 | 1 |
|  |  |  |
| **TOTAL ACTIONS** | **1813** | **2172** |

Records Maintenance Activities increased by 19.7% in FY10.

Serials Solutions Maintenance increased by 24.3% in FY10 ¹

|  |  |  |  |
| --- | --- | --- | --- |
| **Serials Solutions Maintenance** | **FY09** | **FY10** | **% Inc** |
| Database changes \* | 108 | 1000 |  |
| Title Changes \*\* | 3409 | 3930 |  |
| Serial subscription changes: print to digital | 152 |  |  |
| Serial subscriptions changes: cancellations | 302 |  |  |
| Other |  | 6 |  |
| **Total** | **3971** | **4936** | **24.3%** |
| **¹TOTAL** includes changes made by anyone 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: Vendor Account & Product Visits FY10**

07/06/09 – East View, Min Chan

07/29/09 - Japan Publications Trading Co. LTD, Shigenori Kon

08/07/09 – Coutts, Carolyn Morris & MaryLynn Kingston (Profile review)

09/05/09 – Ebsco Publishing, John Henderson

10/15/09 – Springer, Steve Fallon

10/20/09 – Harrassowitz, Justin Clarke

10/30/09 – Gale/Cengage, Theresa DeBenedictis

11/05/01 – Elsevier (Reaxys), Judy Olsen

11/17/09 – Midwest Library Service, Jay Askuvich & Lorraine Best

12/15/09 – Elsevier, Joanna Kilpatrick & Erik Moses

02/02/10 – EBSCO, Terry Walsh

02/10/10 – The Book House, Sandra Brown

03/03/10 – OCLC, Patrick Moriarty

03/09/10 – Eastern Book Company, John Long

03/16/10 – EIU, Jackie Couture

04/29/10 – Erasmus, Dirk Raes

05/20/10 – HW Wilson, Suzanne Conboy

05/27/10 – ACS Publications, Mike Tavares

06/22/10 – John Wiley & Sons, Athena Michael

**Appendix VIII: Acquisitions Services Goals FY 2011**

**Communication & Customer Service**

* Continue providing colleagues a supportive & collaborative work environment by demonstrating high standards of personal responsibility, maintaining courteous and professional interactions; and providing the highest quality customer service.
* Update content on Acquisitions webpage to better communicate services and processes.
* Develop a new Alumni Memorial Books Fund Program brochure.

**Collection Development Support**

* Create more robust collection analysis structure to effectively and efficiently meet the increased need for services in this area.
* Develop options for providing collection and financial statistics, review files, and reports.

**Staff Resource Allocation and Staff Development**

Realign staff resources to adjust to and prepare for changing needs and priorities, including:

* Increasing staff resources to support digital resource acquisition
* Increasing staff resources to support collection analysis
* Review cross-departmental serials workflows to streamline workflows

**Vendor Relations**

* Investigate approval plans for Korean and Chinese materials.
* Consolidate major serial vendors to reduce overall costs, better utilize vendor services, and streamline workflow. In FY11, determine needs and prepare a Request for Proposal (RFP) to send to our three major vendors for transition in FY 2012 or FY2013.

**Systems in Support of Collection Development Activities**

* Incorporate ERM into existing digital resources and serials maintenance and management activities; including developing procedures for managing licenses and retrospective data entry, and utilize ERM to help manage progress of product offers and purchase decisions.
* Continue work with DLTG programmer to rebuild our workflow management database (project delayed in FY10 due to unexpected staff retirements and open positions)
* Enhance FileMaker supporting the Financial Memorial & Non-Memorial Gifts Program.
* Continue to support key systems such as SUMMON

**Administrative**

* Establish a records management retention policy for Alumni Memorial Books Program
* Develop new policy and procedures for order record deletion.

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