

ACQUISITIONS UNIT ANNUAL REPORT-

July 1 2012-June 30 2013

Submitted L Wiley

UNIT NARRATIVE

- 1) identify any significant changes to unit operations, personnel, service profile or program;

Staff Changes:

2 FTE civil service positions were filled with excellent hires: Tammie Redenbaugh took the line vacated by Willa Harper due to her retirement. Tammie assists with approval book processing, handled PDA orders (local and CARLI) and statistics for FY2013 and does nonfiction enhanced cataloging for the Latin American materials. A new position was created with acquisitions wage money and approved by the Budget group. That position was filled by Mirella Bajric to do Slavic copy cataloging. Staff welcomed both to the unit in October 2012.

Ya' Aqov Ziso was hired as the Technical Architect for Library Content Discovery and Delivery in June 2012 and was located in CAM for the year.

IAS is now fully part of acquisitions processing

We worked directly with IAS GAs to Order and receive IAS materials in the vernacular and hired new students to handle Chinese Korean and Japanese serial check in. FY2013 we worked to bring all IAS ordering into the same process used for the rest of the library

The unit welcomed a record number of bibliographers this year to the Library and worked to update information for them, introduce them to services, and provided orientation and training.

Acquisitions worked with OBFS to plan for new audit controls in accounting for noncapitalized expends. We worked with LBO and all 3 campuses and auditors to plan for new accounts and codes to implement for FY2014. Leased materials such as databases will be accounted for this way.

Purchasing assigned staff to work with us to better track and complete paperwork with signatures required by vendors pre invoice. Communication was improved as a result but that staff member left Purchasing before the end of the year. We still have an exemption on SB51 due to expire in December 2014. No progress on library signing was made with Maxine Sandretto who retired this year.

Acquisition RFPS: the Serial RFP committee was convened and completed an RFP to bid the serial contact (Current vendor is EBSCO). That RFP was at Purchasing awaiting processing at the end of the year. The monograph RFP currently held by YBP was not at Purchasing yet at end of year.

Eresources work continued with over 160,000 ebooks added to the online database in FY2013. Serials and online databases managed by Eresources comprise close to 70% of the budget. Access is supported by SFX and PRIMO as well as by Voyager records.

This year Acquisitions focused on IAS acquisition work, assisted in more NSM clean up as serials were canceled or transferred and as books were moved. More LC classification was applied to all the blanket order plans but Slavic and were shelved in Stacks and all new SSHEL books are now LC as of January 2013. Public Outreach was a goal and Acquisitions participated in open houses and staffed forums to assist others in learning about Acquisition services and functions.

Goals set in 2012 and their status:

Overall the goal is to purchase materials for the Library Collections as efficiently as possible while adhering to campus and state guidelines cost effectively and with the best turnaround for access by users.

- Work with Advancement on their web pages for virtual book plating: completed work on the backlog, began a biannual review to add new ones . Held forum to showcase the work
- Hold forums for book plating: see above
- Continue both PDA programs: The CARLI PDA was renewed and the local PDA continues with approval funds used when matched to an approval fund with funds available or central PDA funds when not. CARLI purchases were for 678 new books in all disciplines and the local PDA had users requesting and receiving 769 titles this past year, also covering all disciplines
- Hold Forum on PDA results: held
- Hold serial workshop for check in and for binding module: delayed until FY2014
- Hire for any new positions approved (Slavic copy and LABO copy catalogers): complete October 2012
- Complete serial RFP as EBSCO expires 2013: Completed and at Purchasing
- Explore ways to highlight acquisitions purchases: on hold
- Work with Wendy and with Public Services on FAQ on Eresources: in draft
- Work with staff on customer service and on learning user perspective to best trouble shoot problems: did retreat with staff, identified customers, reviewed what customers need and how to handle problem resolution:
- Do more Outreach for better idea of what is needed from acquisitions: Open Houses done
- Explore additional record outsourcing with OCLC: too expensive and slow
- Redo GOBI profiles offer updates on YBP: done
- Add comprehensive book awards package to YBP: Done
- Work with PRIMO team to anticipate training and workflow changes for Primo implementation: Done
- Work with Advancement on their web pages for virtual book plating: provided examples
- Continue Work with IAS on CJK cataloging and transition all acquisitions and serials to central acquisitions: underway for completion in FY2014
- Explore options for SFX hosting: underway and planned for Summer 2014
- Continue work to acquire receive activate and approve payment for all materials acquired for library collection in 2013: another record year of purchasing completed with close to 18 million spent

2)articulate how the unit or its staff contributed to Library-wide programs, including information services, instructional services, scholarly communications, assessment, collection maintenance and development, digital content creation, bibliographic control, staff training and development, and public engagement;

Staff training and development:

- Provided forums to all library staff and faculty on:
GOBI use and profile changes, worked with Grainger staff on ebook libguide (EBSCO ebooks on GOBI),Virtual book plate forum, three Open Houses, Voyager Acquisitions training, three Tech Services open forums, multiple orientations to new bibliographers, endowed funds forum and fund management

Also facilitated training in LC classification and copy cataloging offered by CAM as well as in RDA

cataloging

Assessment

Fund reports managed and run weekly through Acquisitions,
Approval allocation balances run weekly in Acquisitions
L Wiley joined the Assessment committee and worked on the ARL and Education stats with the new assessment coordinator
Conducted an Ebook study under an IMLS
Provide turnaround studies by vendors

Bibliographic Control

Cataloging statistics indicate that Acquisitions enhanced or added over 40,000 bibliographic records to Voyager and added over 50,000 MFHDS and item records during FY2013. The unit brought in 170,000 via bulk import processes for orders and for vendor supplied records including for purchase on demand programs. The unit continues to buy records for German, Spanish, and Italian as the Aux Amateurs French books covering about 7,000 items acquired. All YPB are promptcat with a portion full shelf ready continuing through 2012-13. The unit is adding short records for all LABO books for Oak St transfer as well as for all Slavic blanket orders making it possible to request these books even while they are in process. The unit helped to initiate a study on foreign language cataloging and will now count titles incoming by a specific Foreign language. We need a good projection on the numbers of materials received that are in non-English and likely the new bibliographers will be ordering more material in other languages.
Shhel went to LC in 2013 and new shelf ready plans are being devised for implementation in 2014.

Public Engagement

Completed backlog of donors notes to records purchased with endowed funds and sending those to Advancement staff (and will update staff there on progress made in Summer 2012)
Open House for CARLI and Mortenson done
UIS and UIC new hire meet and greet

Collection Maintenance and Development

All acquisitions work contributes to Collection Development.
The Unit did the regular work of ordering, receiving, processing, checking in, cataloging, delivering, record maintenance, troubleshooting and invoice prepping for the almost 80,000 items that passed through rm. 12.
The Eresources Librarian handled the many thousand of items that are intangible, i.e. Eresources but that nonetheless require orders, record maintenance, troubleshooting and payment. She also negotiated licenses and processed many contracts required for these purchases.

Unit Head sits on CAPT and on the Primo group and assisted there as needed.

Articulate goals set for the unit for FY2014 (July 1, 2013 – June 30, 2014).

Introduce more shelf ready
Assist in handling foreign language cataloging
Complete final phase of IAS acquisition transition
Plan to hire help Arabic and Persian cataloging and other as needed
Track receipt of material by language

Complete staff Wiki of current documentation
 Complete new Libguide with new updates on all Bibliographers material
 Implement new auditor codes for non-cap expends
 Introduce more eresource guides
 Address serials management with planning document
 Award contracts for serials and for monographs (RFPs ongoing)
 Revend orders as needed, consolidate serials
 Consolidate standing orders
 Serve on Assessment Committee and offer assistance as needed
 Complete IMLS Ebook study
 Offer more staff training
 Offer open sessions on acquisitions work for bibliographers
 Manage large staff
 Manage all fund tracking for balanced fund spending

For units employing Graduate Assistants (GAs), the Unit Narrative should also include the following: the number of GAs (FTE and Head Count) employed during the fiscal year;

GA hours

Jean Louise

Unit requested an Acquisitions GA after having been without for two years due to sabbatical plans. Received hourly funding and hired Jean Louise Zancanella in June 2013. She is redoing bibliographer documentation on a libguide format and is moving staff documentation to a Wiki.

Academic hourly positions for the 2013 year include: Rosemary Trippe, Nada Sweid

The funding source for unit GAs (e.g., state funds, grant funds, endowment):

UL unrestricted funds for Will Hollerich Academic Hourly pool

II STATISTICAL PROFILE

1. Facilities

The following data should be provided by the unit:

Total user seating (if applicable) NOT APPLICABLE

2. Personnel

Units should provide data on all faculty, academic professionals, civil service staff, and Graduate Assistants assigned to the unit during FY12 (FTE and head count). Data should be provided both on filled positions (permanent or temporary) and on positions that are temporarily vacant. Include cost recovery positions and staff hired for special projects and grants, but provide an explanatory footnote indicating the number of such staff. Units should provide data on student wage budget and Student Assistant FTE.

For faculty, staff, and GAs, please note position type, assignments of time under 100%, and assignments that do not span the entire review period in parentheses after name, e.g.:

Lynn Wiley	(Faculty)	(100%)
Wendy Shelburne	(Faculty)	(100%) In E Resources
Stephanie Baker	(AP)	(49%)

Kit Condill (AP) (100%) moved to ACQ in 2011 (IAS staff but works in rm 12)

Beth Trotter LOA 100%

All staff 100% except where noted

Mary Anderson	Senior Specialist;
Silda Andrick	Library Specialist
Naza Agassi	Senior Specialist
Mirella Bajric	Library Specialist hired October 2012
Susanne Birgeron	Senior Specialist
Joyce Catchings	Senior Specialist
Katie Clayton	Library Specialist
Naomi Crow	Library Specialist
Jessica Denhart	Senior Specialist
Katie Dorsey	Senior Specialist
Lisa Fielder	Senior Specialist
Lea Howard	Senior Specialist
Jaelyn Jefferson	Account Technician began assisting LBO with invoices 2010
Diana Long	Senior Specialist
Linda Morris	Library Specialist
Diane Pye	Library Specialist transferred to Music in early 2014 year
Faraba Parish	Senior Specialist
Tammie Redenbaugh	Library Specialist hired October 2012
Tonya Webb	Senior Specialist
Ya' Aqov Ziso	Technical Architect for Library Content Discovery and Delivery

Academic Hourly part time temporary staff:

Nada Sweid handles Arabic and Persian materials

Rosemary Trippe does a variety of the blanket plans copy cataloging

Student Wages: the unit used these wages for serial checkin, marking books, applying call number labels, stacks binding, adding notes to book records and for a variety of misc clerical duties (filing, shelving, sorting)

Grad Assistant: Jean Louise Zancanella who was hied for an ebook grant project ongoing through November 2013 and also continued from May 2013 as a grad hourly to assist in training documentation

3. User Services

The following data will be provided by the Office of Services for individual Library units, as well as Library-wide:

Gate Count and/or Head Count NOT APPLICABLE

Circulation NOT APPLICABLE

Number of presentations to groups (staff for the most part) with Number of participants in group

GOBI and YBP updates

YBP profiling	10
Voyager Acquisitions training	10
Open Houses (3)	20 (Carli) 40 (Library) 25 (Mortenson)
Donor Recognition forum	10
Gift funds (2) with Tom Teper, Chad Lewis and Jason Quackenbush	7 each
Article publishing forum	15
Bibliographer orientations (8)	2-4 each

Held regular open office hours with Wendy and Tom monthly

Number of students enrolled in independent studies or practicum experiences supervised by unit faculty or staff (provide course details)

N/A

Credit course rubric and name taught by unit faculty or staff and number of students enrolled in each (provide course details)

N/A

Appendix I-Statistics

Acquisitions

FY 2011 to FY2012 Comparison

	<u>2013</u>	<u>2012</u>
Monographic Firm Orders	14,200	15,023
New Serial Orders	300	122
Approval Receipts:		
Domestic:	14,616	13,032
Foreign : European/ Latin American/Slavic	16,184	14,307
MISC Approval:		
LC Field Offices, Scores, Art approvals, other misc.	3,217	3,796
GIFTS processed through Acq	230	75
Subtotal approval/misc receipts	34,247	34,139
Total new titles (add in firm orders)	48,747	46,500
Serial issues (Check-)in	28,414	31,584
Now includes all of Slavic issues		
Items handled	77,161	77,742
Monographic Cancellations	687	603
Serial Cancellations	131	135

These statistics do not include the ebooks added as part of packages which numbered over 160,000 in 2013. Staff also prepped over 9000 invoices for the 17 million dollars of collection material acquired, cancelled 700 monograph orders that could no longer be supplied and claimed 2500 titles that were not sent by claim deadlines of 60 day minimum for domestic publishers. Staff monitored 150 approval funds and over 480 state and special funds on behalf of the bibliographers. This year at year end we completed hundreds of inactive Pos and eliminated old funds to keep the database more efficient and accurate.