

ACADEMIC AFFAIRS LIBRARY
UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL
ACQUISITIONS DEPARTMENT
ANNUAL REPORT
2006-2007

PREPARED BY JANET L. FLOWERS
HEAD OF ACQUISITIONS

SEPTEMBER, 2007

**ACADEMIC AFFAIRS LIBRARY
UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL
ACQUISITIONS DEPARTMENT ANNUAL REPORT 2006-2007**

INTRODUCTION

The Acquisitions Department's efficient and timely efforts are essential as the Library transitions to increased emphasis on electronic resources, one of many goals in *Library Directions 2005-2010*.¹ While this report is organized around those major strategic goals, it also covers other ongoing departmental activities to present a fuller picture of the many ways in which the department supports the development of all types of collections.

ACCOMPLISHMENTS AND PROGRESS TOWARDS GOALS

The department fully met almost all of the ambitious goals listed in last year's annual report. In other cases, we made substantial progress. In addition, there were, as always, unanticipated goals to be met. We are very pleased with the strategic progress we made.

ACCOMPLISHMENTS: COLLECTIONS

Prepared to implement Innovative's Electronic Resource Management (ERM)

The ERM Implementation Task Group decided upon policies, fields, tags, and display issues and is close to beginning implementation of the ERM. This new ILS management tool, specifically designed for managing and displaying e-resources, will allow us to not only collocate information about the business model and licensing elements associated with our growing e-resources, but also to make key information widely available to library staff. It also has the potential to expand the information patrons can view and access. When fully implemented, it may eliminate the need to maintain the ERes (electronic resources) database.

Actively participated in and implemented Collection Development Council decisions

The E-Books Task Force of the Collection Development Council (CDC) reviewed e-book products in the fall of 2006 and began understanding the many complexities and challenges they present. The Library Administration approved the Task Force's recommendations, so Acquisitions purchased four e-book collections from Springer and leased ebrary's "Academic Complete Collection." The usage statistics indicate that these are very popular with our users. Now, we must determine whether and how to fund these on an ongoing basis.

In addition, the Portico-LOCKSS Task Force recommended membership in these archiving and perpetual access organizations. We became members of both and are now actively archiving over 7000 online titles through LOCKSS. The Library now has greater opportunities to move to online-only titles, when appropriate, because we have the security of knowing that those e-journals will be available to us at an affordable cost for the foreseeable future.

The Collection Development Council has become both increasingly active as well as proactive in addressing the many urgent collection management issues, including our significant library materials budget gap, the systematic and rapid transition to e-only journals, and the retention review of our existing database subscriptions. Therefore, the CDC, in addition to individual selectors, is now a primary driver of the directions, work, and workloads of the Acquisitions Department because the decisions it makes are ones that we must implement.

**ACADEMIC AFFAIRS LIBRARY
UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL
ACQUISITIONS DEPARTMENT ANNUAL REPORT 2006-2007**

Analyzed collection development trends using data from Millennium

Using the fixed fields in Millennium order records, we were able, as we have since 1991, to provide very detailed monographic selection statistics, including language, country, vendor, etc., for all selectors.

Canceled subscriptions and standing orders per decisions in Serials Review Project

The Print Serials staff canceled the 152 orders identified for mandatory cancellation in the 2005-2006 Serials Review Project and handled the voluntary cancellations that were also submitted.

Followed up on non-payments of paid subscriptions in 2005-2006

The Print Serials Section continued the follow-up of the 607 paid subscriptions not billed in 2005-2006 to determine why we were not billed for these titles costing approximately \$90,000. Approximately half of these titles had not been billed in over two years. The other half was billed in 2004/2005 but not in 2005/2006. Staff researched each title using various tools and contacted the subscription agent and/or publisher to clarify the current status of the publication. As a result of this work, we obtained a number of titles and closed many records for titles that had ceased. This work not only resulted in better service but also enabled us to get our budget projections under tighter control.

Established workflows for electronic theses and dissertations

After review of the tasks required for electronic theses and dissertations, the staff involved decided that there is no role for Acquisitions at this time as Systems and Cataloging are managing the process.

Claimed significant number of standing orders

Thanks to help from a Searcher and a student assistant, we issued claims for an estimated 800 titles. In the process of this routine claiming, we identified 832 additional titles that required status research. These were titles with no recent receipts, spotty receipt histories, or missing receipts related to vendor transfers. Using a combination of available databases, we identified a variety of circumstances ranging from titles to claim, to ceased titles, titles not on order, or orders canceled by the vendor (and not recorded in our system). While this project succeeded not only in our acquisition of more materials but also in the evaluation of our standing orders and vendor performance, there is still much work (e.g., review by selectors for relevance, vendor reassignments) to get these under optimal control.

Processed three-year problem backlog of standing order materials

Due to many factors, the Print Serials Section had a backlog of problematic standing order material that had accumulated over three years. This past year, due to the concentrated efforts of the Standing Order Specialist, the continuity of a fully staffed section for the past two years, and help from Searchers to cover routine duties, all material in the standing order backlog was processed. The problems were resolved and the material forwarded to its appropriate destination in the Library's collections.

**ACADEMIC AFFAIRS LIBRARY
UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL
ACQUISITIONS DEPARTMENT ANNUAL REPORT 2006-2007**

Improved staff interface to acquisition data in Millennium

While the Millennium Acquisitions / Serials Interest Group did not have time to work on this goal, staff did respond to queries from Reference and other staff and suppressed confusing records at the individual title level.

Not able to claim the overdue gifts and exchange subscriptions

There was no time to tackle the gifts and exchanges that have not been claimed regularly for the past several years. We need to review the priority for this work in light of the reduced staffing and many other higher-priority demands.

Systematically survey and take advantage of more favorable consortial offers

We hold membership in five major consortia: Triangle Research Libraries Network, Solinet, Association of Southeastern Research Libraries, Carolina Consortium, and NorthEast Research Libraries. Once again, there was not time to do any systematic analysis of consortial offers, although we took advantage of them, on an ad hoc basis, whenever possible.

Systematically identify and make accessible online access to paid subscriptions

Many of our current paid print subscriptions come with “free” online access, or online access for a nominal surcharge. We identified the “free online with paid print” titles that did not require a license and made them accessible. As for the nearly 150 publishers that both offer “free online with paid print” and require a license, we were unable to move systematically to revise and negotiate the licenses, because attention to licensing was necessarily directed to resources specifically requested by selectors.

Improved blanket orders process

Staff began importing the records for the LC New Delhi plan, the largest blanket order, rather than keying them, which is a significant time savings. The Blanket Order Specialist also improved the tracking spreadsheets relied upon by Accounting and the selectors.

Prepared gifts for compact shelving deadline

Because Davis basement had to be cleared before the compact shelving project began, we had a two-week time-frame, with little notice, to prepare our backlogged gifts for transport out of that area. The Gifts-in-Kind Specialist quickly reviewed 4,428 volumes for disposition. The two Carolina Academic Library Associates (CALAs) then organized and boxed the material for shipment to Wilson Library. Searchers organized and moved collections to be searched soon to areas within Technical Services. This project involved quick strategic decision-making including emergency review by selectors and liberal transport of paperbacks to the book sale. As a result, we sent 3,630 books directly to the book sale holding area in Wilson Library.

**ACADEMIC AFFAIRS LIBRARY
UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL
ACQUISITIONS DEPARTMENT ANNUAL REPORT 2006-2007**

Processed very large volume of gifts

Between the decision to send a large number of gifts to the book sale without searching and the sustained help from the Searching and Order Management Section, the Gifts Section processed ca. 16,000 volumes, of which ca. 8,000 were discarded without searching and ca. 5,800 were sent to Cataloging to be added to the collections. The other 2,000 were duplicates that were not added. Given the high investment in this program, the Library recently appointed a Gifts Task Force to analyze the purpose of the gifts program and all aspects of its operation.

Led in the development of Shared Electronic Resources Understanding (SERU)

Our Library was among the first four university libraries to register with SERU, an alternative to the time-intensive and costly process of negotiating licenses. Using SERU to articulate expectations between the library and participating publishers, and relying upon copyright rather than contract law, we have added five online titles for which we previously had only print access. While these are very small gains, we hope to participate whenever possible because this approach reduces the significant barriers to online journal access that licenses create.

ACCOMPLISHMENTS: SERVICES

Increased percentage of firm orders placed electronically

The MilAcq Specialist continued to set up the EDIFACT interface with monographic vendors to meet our long-term goal to use EDIFACT with any major vendor that can accept the standard. As a result, we reduced our use of paper purchase orders. The percentage of electronically placed firm orders increased from 62% in 2005-2006 to 69% in 2006-2007, because, with EDIFACT, unlike BISAC, we can send our orders for sets and serials electronically.

Participated in vendor database training opportunities

Increasingly, we use our vendors' databases not only to obtain bibliographic and ordering information but also to import data into Millennium. Also, increasingly, the vendors are offering web-based seminars to train users on their new products. We took advantage of several training opportunities from YBP. EBSCO also sent a representative to review the online claim checker and online reports with Print Serials staff.

Continued with Millennium implementation

Due to other pressing business, the Mil Acq Ser Advisory Committee did not review the fields, codes, and values with the Health Sciences and Law Library staff as we had hoped. However, staff did make changes on an ad hoc basis. The committee also did not review the client views to reduce the clicks required for staff to perform their tasks.

Designed a new computer-generated bookplates process

Due to a change at Printing Services, we redesigned the bookplate template and set up a system using InDesign software to produce the gifts-in-kind and purchased gifts bookplates. We will be testing and using this new process in the coming year.

**ACADEMIC AFFAIRS LIBRARY
UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL
ACQUISITIONS DEPARTMENT ANNUAL REPORT 2006-2007**

Resolved e-resources access issues

During this past year, staff responded promptly and efficiently to over 220 inquiries regarding electronic resources.

Out-of-print search

The out-of-print searches have increased in volume over the past few years but the material is easier to obtain with online sources than it was pre-Internet. Most of the out-of-print requests are replacements or efforts to fill in a collection such as SILS-Juvenile.

Interpreted serials records and processes

The Print Serials Section staff were frequently called upon to explain the meaning of notes in the serials records in Millennium and to assist others in their use of these types of records (e.g., for the Population Center and the Business School Library). We hope, in the future, to provide user documentation as well as to make our notes clearer and more transparent to those who do not work with them every day.

Recorded changes in Millennium to reflect closing of Serials Room Desk

The Print Serials Section staff worked closely with the Serials Information and Binding Unit and Serials Cataloging to transfer Serials Desk titles to other locations when the Serials Desk was closed. These changes required several data changes to multiple records.

Assisted the Reference Department in transition from kardex to use of Millennium

This year, the Reference Department, with training from Print Serials staff, began moving information from their manual serial Kardex records to the appropriate serials holdings record in Millennium. Once they have completed this project, they will retire their manual Kardex and rely solely on the information in Millennium.

ACCOMPLISHMENTS: STAFF AND ORGANIZATION

The staff members in Acquisitions are our greatest asset and resource. I am truly grateful for the dedication, skill, and enthusiasm they bring to their work. We were very fortunate this past year to hire three excellent new staff members.

Began recruitment for an Electronic Resources Access Librarian

The Library Administration accepted our petition to create a new position after we had justified it and contributed a vacant SPA position from the Receiving and Invoice Management Section towards the cost. After a failed search, we revisited the needs of the position and revised the vacancy notice to reflect clearer expectations. We will be re-advertising and searching for a strong candidate in the coming year.

Received upgrade for Gifts-In-Kind Specialist position

In recognition of the level of responsibilities in the Gifts-in-Kind Specialist position, the Human Resources Department reclassified it to a Library Technical Assistant II in January 2007.

**ACADEMIC AFFAIRS LIBRARY
UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL
ACQUISITIONS DEPARTMENT ANNUAL REPORT 2006-2007**

Reviewed and streamlined print serials workflows

The implementation of Millennium required much data clean-up. In fact, there are still some residual data problems. However, during this past year, we turned our attention to examining workflows to find steps that could be eliminated, abbreviated, or expedited both to get the workloads for this area under control and to get the material through more quickly. We, unfortunately, did not have time to get very far with this task.

Encouraged attendance at professional meetings

Many staff members in Acquisitions attended various learning opportunities such as the LAUNC-CH Conference, the TRLN Annual Meeting, and the North Carolina Serials Conference. As the rate of change around us is accelerating, these meetings provide opportunities to enhance and enrich staff's understanding of the new directions in which libraries are headed.

Increased understanding of electronic resources and implications for our department

We held two meetings this past year to help staff understand what was going on in the e-resources world. The first, which was for Print Serials, was about current issues. The second, geared toward the three monographic sections, explained the roles, tasks, and some terminology of the Electronic Resources Section. We will continue addressing this area proactively, especially after we have more staff in the Electronic Resources Section.

ACCOMPLISHMENTS: DIGITAL LIBRARY

Participated in the Information Technology Council

The Information Technology Council discussed priorities, principles, and procedures as they related to information technologies that affect the Library. The Council decided to create space in an archive for licensed digital content. The Library now has another option, in addition to Portico and LOCKSS, for securing access to purchased digital content. This past year, the Library submitted content for two resources (Eighteenth Century Collection Online and Past Masters) for digital preservation.

ACCOMPLISHMENTS: COMMUNICATIONS

Improved knowledge management within the Department

Many of the procedures are out-of-date as a result of the Millennium implementation. Because acquisitions work is very detailed and complex the procedures should be up-to-date. We had hoped to find a tool and time to prepare this documentation in 2006-2007. A few staff members were trained in Joomla, a content management system, late in the year. To develop standards and an organization for this project is an ongoing challenge.

**ACADEMIC AFFAIRS LIBRARY
UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL
ACQUISITIONS DEPARTMENT ANNUAL REPORT 2006-2007**

GOALS FOR 2007-2008

COLLECTIONS GOALS

- After the Collection Development Council has evaluated the Springer pilot e-books project and made recommendations for continuation of collections, implement the decisions
- Review and develop policies and procedures to do title-by-title selection and ordering of e-books through YBP and publishers when necessary; begin placing orders for individual e-books, probably beginning with a replacement project
- Systematically and responsibly implement format changes from print-plus-online to e-only journals based upon selectors' decisions; cancel print subscriptions
- Participate actively in the Gifts Task Force's systematic review of the gifts-in-kind program; contribute perspectives regarding recommendations for its purpose and all aspects of its operations; implement changes approved by the Collection Development Council and the Library Administrative Council

SERVICES GOALS

- Gather data for R2 analysis; participate actively in meetings with consultants; review recommendations thoughtfully and deliberately; make choices that seem most appropriate for our situation; and begin implementing decisions
- Scrutinize and carefully review services of YBP, the major English-language monographic vendor used for approval plans, firm orders, and standing orders; evaluate and articulate our needs and concerns more clearly; review service concerns; and take advantage of new services
- Scrutinize and carefully review services of Harrassowitz, a major all-purpose vendor used for approval plan, firm orders, standing orders, print subscriptions and electronic resources; make better use of reporting capabilities; and make better use of vendor databases and services
- Scrutinize and carefully review services of EBSCO, the major print serials and electronic resources vendor; evaluate and articulate our needs and concerns more clearly; review service concerns; make better use of reporting capabilities; and make better use of vendor databases and services
- Train Reference staff to key their own firm order requests into Millennium to reduce duplication of effort and to expedite order placement

**ACADEMIC AFFAIRS LIBRARY
UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL
ACQUISITIONS DEPARTMENT ANNUAL REPORT 2006-2007**

- Continue to train interested branch library staff to tag in GOBI
- Review ways to streamline bookplate production; implement a new process using InDesign software to produce bookplates that are required for purchases or gifts-in-kind
- Review the subscription and standing order titles paid in 2005-2006 but not 2006-2007 to determine their exact status; obtain the material if available; close out records if title has ceased, etc.
- Participate in YBP OCLC Bronze Beta Test to test the feasibility of acquiring cataloging copy via YBP
- Help branch libraries take advantage of the Millennium Serials module in place of local record-keeping in other systems
- Continue encouraging publishers to use SERU in lieu of a license to facilitate the processing of the electronic resources subscriptions and speedy establishment of access

STAFF AND ORGANIZATION GOALS

- Recruit, hire and train persons for vacant positions as they occur; re-design and advertise for two held positions based upon internal review of recommendations from R2
- Develop strategies to provide adequate backup coverage for the major time-sensitive duties of every position within the department; provide necessary training; change work plans to reflect new expectations; and implement new work assignments
- Work closely with staff to manage the changes and transitions effectively; hold a departmental retreat to begin this process
- Continue to build collaborative and collegial teams
- Continue to educate staff and integrate the print and electronic work within the department

DIGITAL LIBRARY GOALS

- Lend expertise in managing and licensing digital content
- Participate in questions and solutions concerning pre-and post publication content that may relate to licensed materials currently managed by Acquisitions

**ACADEMIC AFFAIRS LIBRARY
UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL
ACQUISITIONS DEPARTMENT ANNUAL REPORT 2006-2007**

COMMUNICATION GOALS

- Provide written interpretation of serials acquisitions records in Millennium; share background and provide written explanations of the ERM; and educate selectors regarding licensing issues and their impact upon collection management decisions
- Explain the functions and duties of all sections to each other to promote better understanding, improve communication, and pool collective wisdom for problem solving, decision making and planning

FACILITIES GOALS

- Design and organize the efficient use of compact shelving in Davis basement to optimize processing of gifts-in-kind
- Review departmental space needs in light of organizational changes; design new space plans; and submit equipment request in 2008-2009 to accomplish these changes

**ACADEMIC AFFAIRS LIBRARY
UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL
ACQUISITIONS DEPARTMENT ANNUAL REPORT 2006-2007**

CONCLUSION

While we have very ambitious goals, including reorganization of the department to meet evolving needs, I am very optimistic that we are going to make significant improvements within the department in the coming year. I base my optimism on a number of factors. The first is that we have a very resourceful and flexible staff that has already successfully absorbed and incorporated major changes, such as the migration to Millennium. The second is that R2's consulting skills match those needed to guide us in the upcoming challenges. The third is that we will be hiring another librarian to assist with the very heavy e-resources workload. Also we will hire other positions once we figure the best configuration to meet the department's highest priorities. Fourth is that the gifts operation is now under much better control as a result of the new compact shelving in Davis basement (eliminating the past space logistics challenge), the near elimination of the gifts backlog, and, most importantly, the hope of a streamlined process. Finally, the department has a track record of successfully navigating through major changes, setbacks, and new workloads. I know that we will do so once again.

The acquisitions landscape continues to change dramatically as the result of many factors. The Department's work has become much more outwardly focused partly due to the access maintenance and archiving for electronic resources. There is also greater collaboration with selectors on matters ranging from vendor interfaces, to specific purchases, to negotiations with vendors. In time, we expect to see more blurring of the lines between not only the print serials and electronic resources staff but also the monographic and the electronic resources staff as we move toward more integration of print and electronic workflows. We also anticipate a greater blurring between Acquisitions and Cataloging as we investigate ways to have our workflows reflect the integrated nature of the Millennium database.

We are currently in a hybrid environment with a significant investment still in print resources. However, there are projects beginning that will, over time, transition us to greater emphasis upon electronic rather than print journals. The Collection Development Council's E-Only Journals Review Project has initiated our migration to more reliance upon e-journals to save space, staff time, and money. When the initial phases of this project are completed, we will have changed the format of hundreds of titles from print plus online to e-only. Initially there is a significant additional workload for the Print Serials Section. However, as we complete this transition work, there will be a reduction in the print work for this staff and they will be trained to assist with the growing demands of the electronic resources.

We are also moving into a hybrid monographic environment with the introduction of e-books as another format that must be collected. The impact of the decision to purchase four Springer e-books collections was felt in the standing order area where print standing orders were canceled because they were replaced by the e-version. In the case of ebrary, because the library administration funded the purchase without using monographic funds, there was no significant impact upon the monographic sections. However, as selectors continue selecting e-books and databases in lieu of print, the number of print monographs that we purchase will continue to decline. The departmental supervisors will also watch this workload and move staff to areas of greater need.

**ACADEMIC AFFAIRS LIBRARY
UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL
ACQUISITIONS DEPARTMENT ANNUAL REPORT 2006-2007**

At the same time that we are moving aggressively into more electronic resources, we have maintained a monographic print-based gifts operation. As this operation has not been analyzed in more than 15 years, the Gifts Task Force will be looking at the Gifts Section's work from the purpose of the gifts program to all the processes that are required to implement those goals. We will streamline all aspects of the operation to provide maximum efficiency and to make certain that we are using the staffing resources for the Library's highest priorities.

Overall, we will be seeking ways to streamline and to incorporate our workflows and work assignments in the most effective ways. We are very fortunate that the Library has hired R2 Consulting, an outstanding consulting firm with an excellent track record for positive changes that will benefit library users. Our many ambitious goals will be further refined after review of the R2 recommendations. We look forward to meeting the challenges and opportunities that the major and fast-moving changes throughout the department will bring.

**ACADEMIC AFFAIRS LIBRARY
UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL
ACQUISITIONS DEPARTMENT ANNUAL REPORT 2006-2007**

THANKS

I would like to sincerely thank the following staff members who carefully and thoughtfully reviewed and edited the entire report and appendices:

Cynthia D. Baker
Cyndie Cowan
Selden D. Lamoureux
Elizabeth C. Meehan-Black
Johanna Russ

Their insights into the work of their own sections greatly enriched the depth of this report.

In addition, Ardys Ketcham provided excellent proofreading and stylistic suggestions. Johanna Russ prepared and revised most of the statistical appendices. And Jeannette Lebeouf-Kassam converted the disparate documents into a PDF file.

¹ The University of North Carolina at Chapel Hill Library. *Library Directions: 2005-2010*. November 18, 2005.

APPENDIX A: ACQUISITIONS STAFF ACTIVITIES 2006-2007

PUBLICATIONS

<i>Author</i>	<i>Publication</i>
Maria Collins (with Selden Durgom Lamoureux)	Maria Collins, ed., "SERU: An Alternative to Licensing - An Interview with Selden Durgom Lamoureux," <i>Serials Review</i> 33, no. 2 (2007): 122-128.

PRESENTATIONS

<i>Presentations</i>	<i>To Whom</i>	<i>Presenter</i>
Acquisitions for Newbies	Pre-Conference Charleston Conference	Janet L. Flowers
E-Books: The Time is Right	All-Staff Meeting	Janet L. Flowers
Alternatives to Licensing E-Resources	North American Serials Interest Group Conference (NASIG)	Selden Durgom Lamoureux
Doing Less to Do More: Incorporating Outsourced MARCs and Brief Bibs for Serials Discovery	American Library Association Annual Conference (ALA)	Selden Durgom Lamoureux
Alternatives to Licensing: the NISO SERU Initiative	LAUNCH Research Forum	Selden Durgom Lamoureux

AWARDS

<i>Awards</i>	<i>To Whom</i>
Employee Recognition	Kent Coyle Chris Wolf
Star Heel	Ardys Ketcham Cam Mitchell Selden Durgom Lamoureux

DIVISION COMMITTEES

<i>Division Committees</i>	<i>Member(s)</i>
Technical Services Automation Task Group	Julie (Roach) Green

APPENDIX A: ACQUISITIONS STAFF ACTIVITIES 2006-2007

LIBRARY COMMITTEES

<i>Committee Name</i>	<i>Member(s)</i>
Accounting/Acquisitions Liaison Group	Elizabeth C. Meehan-Black
Acquisitions / Serials Interest Group	Cyndie Cowan Larry (Dean) Farrell Janet L. Flowers Julie (Roach) Green Kathy Jacobs
Acquisitions / Serials Advisory Committee	Cyndie Cowan Janet L. Flowers
Associate Librarians' Appointment and Promotion Committee	Selden Durgom Lamoureux
Carolina Consortium	Selden Durgom Lamoureux
Collection Development Council	Janet L. Flowers Selden Durgom Lamoureux
Displays Committee	Ardys Ketcham
Distant Education Resource Selection Committee	Selden Durgom Lamoureux
E-Books Task Force	Janet L. Flowers Elizabeth C. Meehan-Black Selden Durgom Lamoureux
Electronic Access Coordinating Committee	Selden Durgom Lamoureux
Electronic Resources Selection Committee	Selden Durgom Lamoureux
Employee Appreciation and Recognition Committee	Kent Coyle / Leah J. Hefner
ILS Coordinating Committee	Janet L. Flowers
ILS Electronic Resources Module Committee	Selden Durgom Lamoureux
ILS Transition Acquisitions Serials and Financial Control Advisory Committee	Cyndie Cowan Janet L. Flowers
Information Technology Council	Selden Durgom Lamoureux
Librarians Ranking Procedures Committee	Janet L. Flowers
Library Public Art Committee	Elizabeth C. Meehan-Black
Parking Review Committee	Janet L. Flowers
Portico / LOCKSS Task Force	Selden Durgom Lamoureux
Search Committee for Electronic Res. Access Librarian	Elizabeth C. Meehan-Black
Search Committee for Electronic Resources Cataloger	Selden Durgom Lamoureux
Search Committee for Serials Access Librarian	Elizabeth C. Meehan-Black
SPA Forum	Cyndie Cowan
Staff Development Committee	Katherine (Kat) Haggerty
TRLN Electronic Resources Committee	Selden Durgom Lamoureux
TRLN Science Technology Medicine Committee	Selden Durgom Lamoureux

APPENDIX A: ACQUISITIONS STAFF ACTIVITIES 2006-2007

UNIVERSITY COMMITTEES

<i>Committee</i>	<i>Member</i>
75 th Anniversary Planning Committee School of Information and Library Science	Selden Durgom Lamoureux

PROFESSIONAL COMMITTEES

<i>Committee</i>	<i>Organization</i>	<i>Member</i>
Award Committee	North Carolina Library Association/Literacy Roundtable	Elizabeth C. Meehan-Black
Collection Development and Electronic Resources Committee	American Library Association	Selden Durgom Lamoureux
Executive Committee	North Carolina Library Association	Elizabeth C. Meehan-Black
Membership Committee	North Carolina Library Association	Elizabeth C. Meehan-Black
Nominating Committee	North Carolina Library Association/Literacy Roundtable	Elizabeth C. Meehan-Black
Planning Committee	North Carolina Serials Conference	Selden Durgom Lamoureux
Research Libraries Serials Section Discussion Group	American Library Association	Selden Durgom Lamoureux
SERU Working Group	NISO	Selden Durgom Lamoureux

OFFICES HELD

<i>Position</i>	<i>Organization</i>	<i>Officer</i>
Chair	Literacy Roundtable / North Carolina Library Association	Elizabeth C. Meehan-Black
Co-Chair	Planning Committee / North Carolina Serials Conference	Selden Durgom Lamoureux
Chair	Research Libraries Serials Section Discussion Group	Selden Durgom Lamoureux
Vice Chair, Chair Elect	Collection Development Electronic Resources Committee / ALCTS / American Library Association	Selden Durgom Lamoureux

APPENDIX A: ACQUISITIONS STAFF ACTIVITIES 2006-2007

TEACHING

Course	Topic	Instructor
Resource Selection and Evaluation Course INLS 153	Overview of Acquisitions Work	Janet L. Flowers
INLS 795 : Field Experience	Site Supervisor for special topics in Electronic Resource Management	Selden Durgom Lamoureux

APPENDIX B: STAFF TURN-OVER IN ACQUISITIONS 2006-2007

Person	Job Title	Position Number	Replacement	Position Vacated	Date Filled
Pete Ramsey	Electronic Resources Specialist	16969	Megan Griffin	8/23/06	05/01/07
Laura Merte	Bibliographic Searcher	16862	Leah Hefner	8/11/06	2/21/07
Chris Boyd	Head of Receiving and Invoice Management Section			12/29/06	Being held for review of needs
Larry (Dean) Farrell	Millennium Serials Specialist	17068		1/31/07	Being held for review of needs
Kent Coyle*	Order / Receipt Expediter	17082	Kate Agnelli	2/28/07	5/16/07
Cassie Hoffman	Subscription Receipt Assistant	55689		6/22/07	9/04/07
Jared Keenan	Order / Receipt Expediter	16968		5/16/06	Position Abolished to Create new EPA position

*Kent retired after 32 years of service, most of it in the Acquisitions Department. We celebrated his contributions with a departmental as well as library-wide party.

APPENDIX C: STUDENT ASSISTANT HELP IN 2006-2007

We are indebted to our loyal, dedicated, and resourceful student assistants who perform many important tasks that enable our department to achieve its goals.

Student Assistants in Gifts Section

Lauren Rousseau	July 2006- December 2006
Nick LoBuglio	October 2006-May 2007
Megan Marsh	1/22/07 – 2/10/07
Irina Iliescu	May 2007-June 2007

The student assistants in the Gifts Section helped with various tasks including pick-ups, unboxing, sorting, bookplates, and re-boxing the gifts. This work enabled the Gifts-in-Kind Specialist to work on other important tasks such as donor relations and the logistics of acquiring large gifts collections.

Student Assistants in Print Serials Section

Matthew Braswell	July 2006-June 2007
Megan Griffin	July 2006-May 2007
Jennifer Merriman	March 2007-June 2007
Ashley Pendergrass	August 2006-December 2006
Scott Phillips	January 2007-May 2007
Elizabeth Weislak	May 2007-June 2007

The student assistants in the Print Serials Section continued to open the subscription mail and check in the subscription materials this year. This work freed the full-time staff members to devote more time to their other duties, including problem resolution.

Student Assistants in Receiving and Invoice Management Section

Irina Iliescu	July 2006-August 2006
	December 2006-January 2007
Alvian Istrate	September 2006-January 2007
Dmitri Pchelintsev	September 2006-January 2007

The student assistants in the Receiving Section assisted with blanket orders, unboxing, sorting and recording shipments, keying records and receiving in Millennium, as well as routing the materials to the Cataloging Department. They also sorted materials by whether bookplates were required, prepared bookplates, placed bookplates in the materials, and routed the materials to the Cataloging Department. This enabled the Blanket and Firm Order Specialist to focus on receiving other special materials, resolving complex problems, training new staff, and updating procedural documentation.

Appendix D: Statistical Highlights of Appendices E through L

All volume and percentage changes have prior year 2005/2006 as a baseline, unless otherwise stated

Appendix E Searching & Approval Plans

- Total Requests Searched-- 40% decrease reflects switch in acquisitions method to more approvals and blanket orders as well as impact of electronic resources upon firm order budget
- Large Approval Plans--4.8% increase reflects the increasing number of publishers covered by YBP
- Small approval plan total--38% increase reflects expansion in plans

Appendix F Firm and Blanket Orders

- Firm Orders Received--22% decrease reflects switch in acquisitions method to more approvals and blanket orders as well as impact of e-resources and inflation upon firm order budget
- Blanket Orders Received--11% increase reflects some profile changes

Appendix G Order Record Closure

- 7.4% decrease reflects cataloging trends

Appendix H Gifts

- Volumes Processed*--131% increase reflects change in reporting as well as strategic decisions to send many volumes directly to Book Sale plus substantial help from Searching and Order Management Section
- Volumes Added--30% increase reflects substantial help from Searching and Order Management Section

Appendix I Print Serials

- Total New Titles-- 37% decrease reflects fewer new print subscriptions being placed
- Back File Issues Received-- 89% decrease reflects fewer back issue orders being placed

- Total Titles Closed-- 66% increase reflects several projects to follow up on materials not billed and publishers going from print to online only

Appendix J Current Active Serials

- Basically all of the stats here show a continuing downward trend

Appendix K Electronic Resources

- We lack enough data to analyze this.

Appendix L E-Books

- Total: 205,490 - no trend comparison available

APPENDIX E: MONOGRAPHIC STATISTICS--SEARCHING

	97/98	98/99	99/00	00/01	01/02	02/03	03/04	04/05	05/06	2006/2007
Purchase Requests										
Regular Requests Searched	21,696	23,685	24,865	23,558	18,870	19,329	13,502	12,916	14,062	8,113
Rush Requests Searched	1,537	1,162	1,516	2,113	1,455	1,935	1,826	1,713	1,377	1,120
Total Requests Searched	23,233	25,119	25,801	25,671	20,325	21,264	15,328	14,629	15,369	9,233
Duplicate Requests	3,961	4,108	3,329	2,634	1,367	1,587	1,140	815	725	537
% of Orders Searched	17.0%	16.4%	12.9%	10.2%	6.7%	7.5%	7.4%	5.6%	4.7%	6.0%

Approval Plan Vols. Added										
Small Approval Plans										
British Belles Lettres	201	292	125	174	185	137	152	133	123	215
BAP Humanities						468	1,125	1,205	1,050	1,508
BAP Social Sciences						270	564	605	597	679
Children's Books	117	104	103	78	223	146	164	183	206	225
SILS Approval Plan?										25
German Belles Lettres						127	85	99	122	100
MSAP	354	532	119	117	272	181				
MBOP	129	136	140	83	132	165	129	161	156	148
Philosophy?										218
Planning						19	9	14	9	9
Totals	801	1,064	487	452	812	1,513	2,228	2,400	2,263	3,127
Large Approval Plans										
University Presses	7,848	8,906	8,478	8,836	8,666	8,718	7,906	7,598	8,197	8,394
LEAP Western European	664	824	876	3,347	1,040	946	760	714	786	702
LEAP Social Sciences	5,580	7,001	6,897	7,629	7,808	7,276	6,379	6,944	7,452	7,154
LEAP Humanities	5,829	6,079	6,771	7,171	7,677	6,373	6,302	5,981	6,845	7,584
NYT/TLS Authors						1,661	1,313	1,695	1,931	1,843
Totals	19,921	22,810	23,022	26,983	25,191	24,974	22,660	22,932	25,211	25,677
Total Approval Vols. Added	20,722	23,874	23,509	27,435	26,003	26,487	24,888	25,332	27,474	28,804

Firm Orders Placed**										
Regular	23,248	26,015	24,527	30,515	29,979	26,152	17,280	15,680	19,328	19,806
Rush	2,836	2,131	2,198	2,398	1,960	2,412	2,490	1,896	2,404	2,226
Total Orders Placed	26,084	28,146	26,275	32,913	31,939	28,564	19,770	17,576	21,732	22,032

* collapsed into LEAP

+ collapsed into GAP

** Searching and Order Management from October 2003.

N.B. Some plans have been dropped over the years and are not reflected in the lines but are in the totals.

APPENDIX F: RECEIVING SECTION STATISTICS

	97/98	98/99	99/00	00/01	01/02	02/03	03/04	04/05	05/06	2006/2007
Firm Order Material Received										
Books	29,902	30,920	24,899	34,325	32,441	26,124	20,336	22,108	23,201	20,288
Non-Books	20,824	32,602	28,362	18,060	9,995	7,000	35,614	5,564	6,903	3,280
Total Material Received	50,726	63,522	53,261	52,385	42,436	33,124	55,950	27,672	30,104	23,568
Blanket Order Material Received	n/a	n/a	n/a	n/a	1,681	2,643	2,178	3,549	3,055	3,389
Total Orders Received					44,117	35,767	58,128	31,221	33,159	26,957

APPENDIX G: DATABASE MAINTENANCE STATISTICS

	97/98	98/99	99/00	00/01	01/02	02/03	03/04	04/05	05/06	2006/2007
Monographic Order Record Closure										
Order Record Closure	55,618	44,871	42,983	57,962	56,326	48,057	51,959	n/a	65,416	60,581

APPENDIX H: GIFTS SECTION STATISTICS

GIFTS SECTION

	97/98	98/99	99/00	00/01	01/02	02/03	03/04	04/05	05/06	2006/2007
Gifts										
Volumes Received	12,336	13,218	11,189	12,937	8,967	15,309	17,290	13,185	15,979	13,615
Volumes Discarded without Searching (Friends, SEER)	10,727	10,043	3,176	4,624	5,944	3,949	3,901	4,493	3,899	8,004
Duplicates Discarded after Searching	3,705	2,794	2,323	2,896	4,669	3,184	2,000	4,952	4,296	3,205
Volumes Added	4,886	4,183	3,491	5,312	5,352	7,394	8,998	6,171	4,454	5,779
Total Searched	8,591	6,977	5,814	8,208	10,021	10,578	10,998	11,123	8,750	8,984
Volumes Processed	8,591	6,977	5,814	8,208	8,620	10,578	11,128	11,123	7,368	16,988

APPENDIX I: PRINT SERIALS

	97/98	98/99	99/00	00/01	01/02	02/03	03/04	04/05	05/06	2006/2007
New Ongoing Orders Placed										
Subscriptions										
Print, Microform, CD	149	583	548	321	133	237	106	105	96	98
Standing Orders (including sets)										
Print, Microform, CD	77	67	88	148	90	57	25	60	56	73
Total-Subscriptions & Standing Orders	226	650	636	469	223	294	131	165	152	171
Transfer Orders	247	78	23	66	113	602	1,728	13	41	14
Total Orders Processed	664	728	659	535	336	896	2,069	178	193	185

One-Time Orders Placed										
Back File Orders	127	117	92	111	46	104	39	53	28	
Missing Issue Orders	64	51	36	6	33	5	3	10	45	

New Titles Received										
Subscriptions	173	465	558	388	199	306	278	249	179	89
Standing Orders (including sets)	91	66	104	165	74	53	34	56	72	70
Total New Titles	264	531	662	553	273	359	312	305	251	159

One Time Orders Received										
Back File Issues Received	1,102	595	528	817	347	1,479	329	531	220	24
Missing Issues Received	106	137	43	34	73	5	14	9	55	50

Pieces Received										
Subscriptions & Non-Monographic Standing Orders	64,525	64,424	61,216	61,513	61,899	57,788	55,926	54,648	52,581 *	56,514

*Due to migration & merger issues, the piece count number has been extrapolated from the 10-month total of 46,662.

Monographic Standing Orders										
Class Seps	1,993	2,425	2,168	2,436	2,173	2,208	2,365	1,872	2,050	2,165
Analytics	696	64	652	840	637	690	637	469	551	559
Total Class Seps & Analytics	2,689	2,489	2,820	3,276	2,810	2,898	3,002	2,341	2,601	2,724

APPENDIX I: PRINT SERIALS

	97/98	98/99	99/00	00/01	01/02	02/03	03/04	04/05	05-06	2006/2007
Titles Closed										
Subscriptions Ceased	119	54	118	147	112	81	53	75	63	119
Standing Orders (incl. sets) Ceased	55	35	96	97	116	85	107	50	39	183
Total Ceased	174	89	214	244	228	166	160	125	102	302
Subscriptions Canceled	133	101	258	180	96	198	195	127	121	90
Standing Orders (incl. sets) Canceled	33	49	24	50	17	125	42	64	57	73
Total Canceled	166	150	282	230	113	323	237	191	178	163
Total Titles Closed	340	239	496	474	341	489	397	316	280	465
Net Change	(76)	292	166	79	(68)	(130)	(85)	(11)	(29)	(306)

APPENDIX J: CURRENT ACTIVE SERIALS 1997-2007

	97/98	98/99	99/00	00/01	01/02	02/03	03/04	04/05	05/06	2006/2007
Subscriptions										
Paid	8,799	9,001	9,641	8,476	8,401	8,289	8,124	8,143	8,084	7,864
Gift	860	907	928	743	686	683	674	674	663	656
Exchange	601	566	571	527	526	526	520	517	501	493
Total	10,260	10,474	11,140	9,746	9,613	9,498	9,318	9,334	9,248	9,013

Standing Orders (Non-Sets)										
Paid	4,251	4,123	4,306	4,091	4,259	3,981	3,832	3,787	3,719	3,527
Gift	175	201	208	238	239	241	237	237	249	257
Exchange	112	132	139	117	119	120	116	115	118	98
Total	4,538	4,456	4,653	4,446	4,617	4,342	4,185	4,139	4,086	3,882

Standing Orders (Sets)										
Paid	692	786	811	761	759	729	703	698	687	652
Gift	3	3	4	4	3	0	4	4	4	4
Exchange	3	3	3	3	3	3	3	3	3	3
Total	698	792	818	768	765	732	710	705	694	659

Total Standing Orders	5,236	5,248	5,471	5,214	5,382	5,074	4,895	4,844	4,780	4,541
------------------------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------	--------------

Total Subscriptions & Standing Orders										
Total Paid	13,742	13,910	14,758	13,328	13,419	12,999	12,659	12,628	12,490	12,043
Total Gifts	1,038	1,111	1,140	985	928	924	915	915	916	917
Total Exchange	716	701	713	647	648	649	639	635	622	594
Grand Total	15,496	15,722	16,611	14,960	14,995	14,572	14,213	14,178	14,028	13,554

APPENDIX K: ELECTRONIC RESOURCES

ERES Stats	00/01*	01/02	02/03**	03/04**	04/05**	05/06†	2006/2007†
EJs Added	2,156	1,073	30,303	16,561	7,739	1,836	549
EIDs Added	97	127	88	116	99	85	179
Total EJs & EIDs Added	2,253	1,200	30,391	16,677	7,838	1,921	728
Total EJs†	4,160	5,233	38,710	48,779	45,460	47,296	47,845
Total EIDs	347	474	486	578	658	683	862
Total EJs & EIDs	4,507	5,707	39,196	49,357	46,118	47,979	48,707
Total EJs Holdings (non-deduped)††							76,174

*2000/01 stats begin with 08/05/00 because the current database was created on 08/04/00.

**From 2002/03 includes only titles available at the end of the fiscal year.

Title counts are not adjusted for duplication and may include some errors due to SerialsSolutions dataloads.

Title counts are gathered from the ERES database, not Millennium.

†Note that EJ counts have been de-duped since 2005/2006 using SerialsSolutions data. Database counts are from ERES db.

††Starting with 2006/2007, counts from SerialsSolutions of the non-deduped (Total EJ Holdings) are provided.

The data above has NOT been cross-checked so should not be accepted as accurate. JLF 9/10/07

	00/01	01/02	02/03	03/04	04/05	05/06	2006/2007
*New Subscriptions							
Subscriptions (Paid)	133	78	80	159	177	197	68
Open Access	NA	NA	NA	NA	NA	NA	220
Totals	133	78	80	159	177	197	288

*Does not represent the number of titles (e.g., in packages)

Appendix L: E-Books

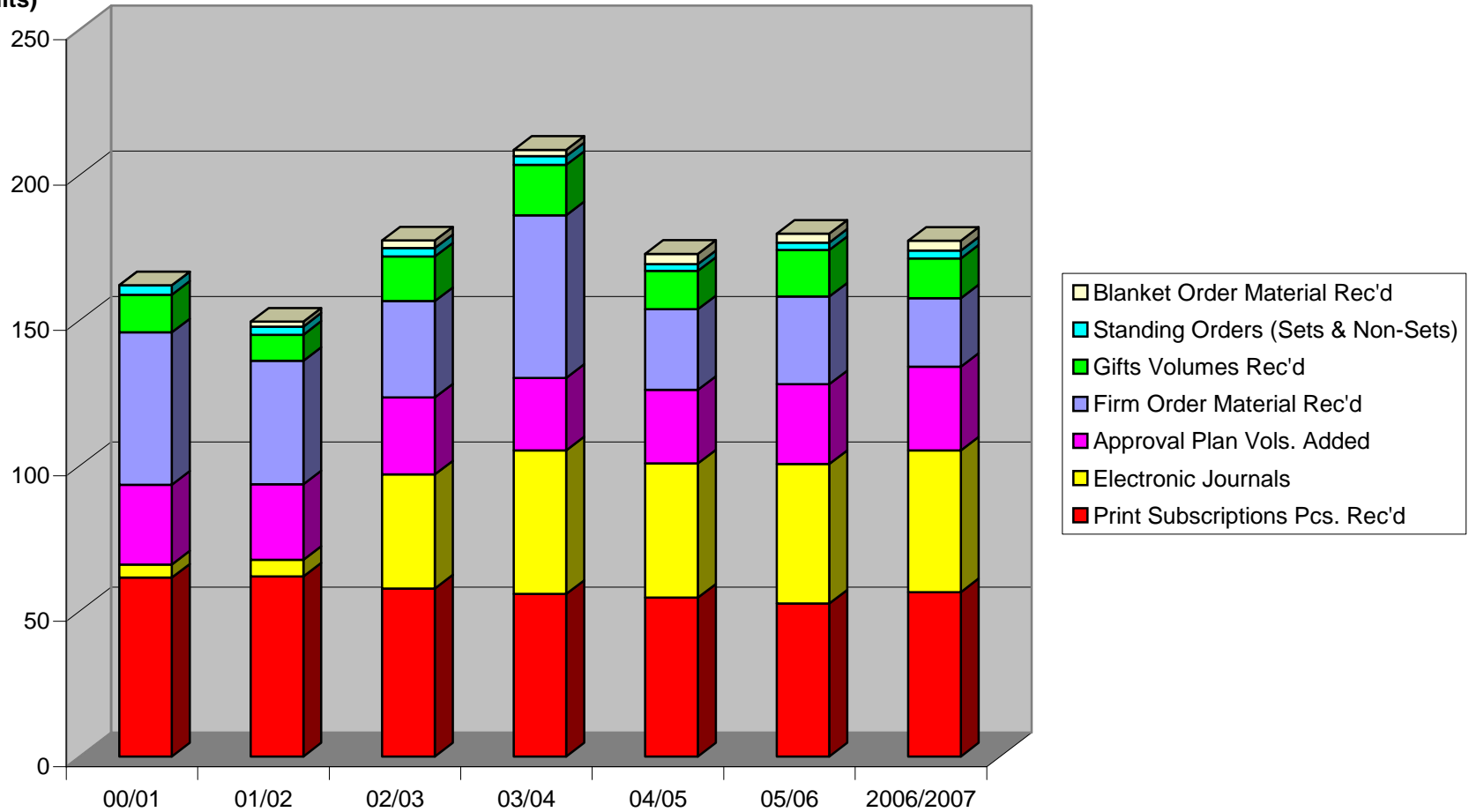
Collection Name	Number
DocSouth	1,373
ebrary	31,497
ECCO	136,213
Netlibrary audiobook	1,511
Netlibrary regular	24,313
Oxford Reference Online Premium	154
Rand	3,246
Safari	128
Springer	6,841
E-Theses & Dissertations	201
E-books not included in collections	13
	205,490

*Statistics provided by Cataloging Department

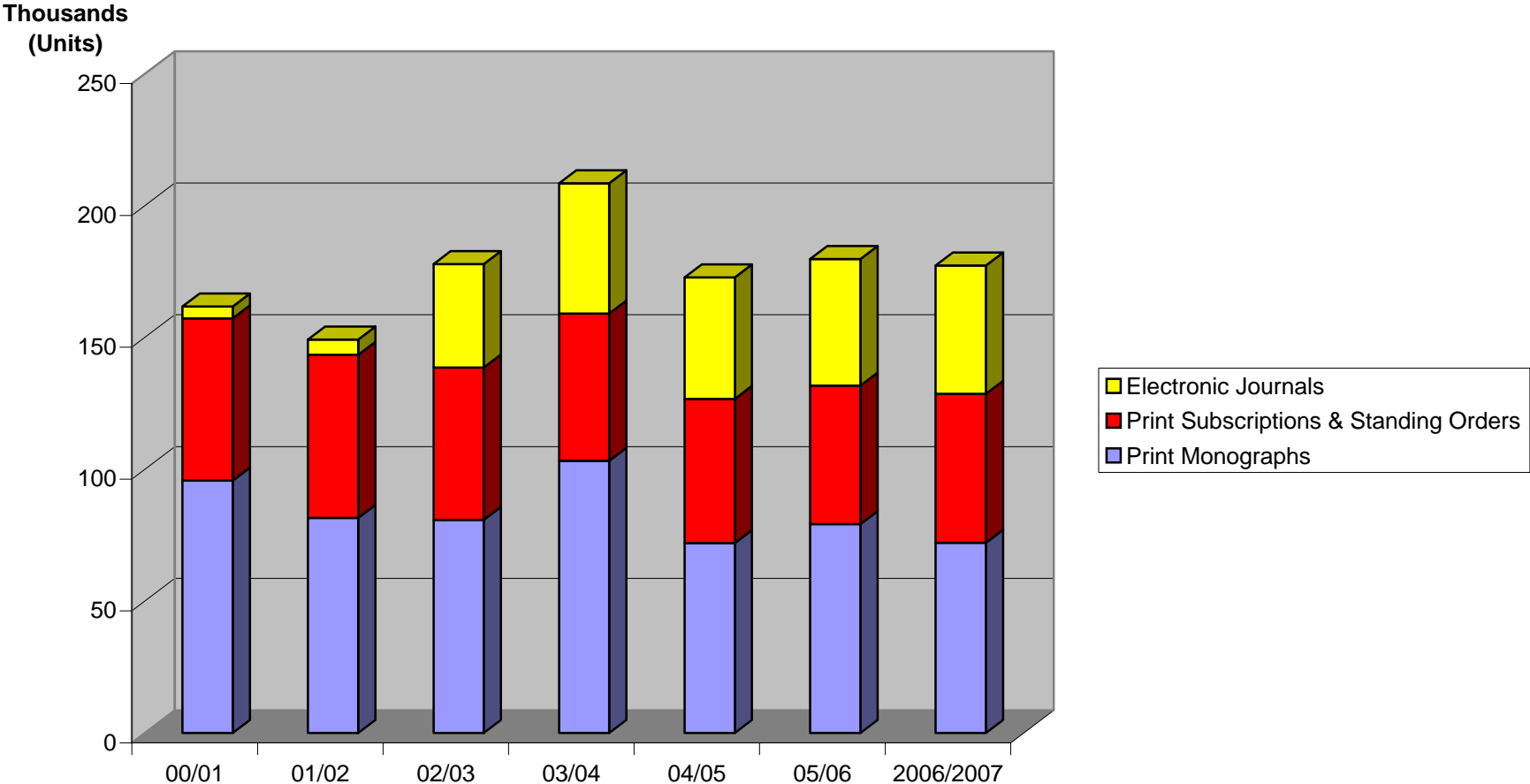
Appendix M: Mix of Acquisitions Methods from 2000/2001 to 2006/2007

Seven Workstreams Contributing to Meeting Our Goals

Thousands
(Units)



Appendix N: Nature of Material Acquired from 2000/01 to 2006/07



Electronic Resources data for 05/06 is not available at press time