Notes from 2nd Meeting of OPAL Acquisitions Special Interest Group
Wednesday, April 28th 10am-2pm
OhioNET, 1500 West Lane Ave, Columbus OH
Also available via Elluminate recordings found through Acquisitions website

Please note that some technical information may be transcribed wrong. If any errors are spotted, please send the correction to Elizabeth Zeitz (EZeitz@otterbein.edu) so that the correction can be made and reposted to the webpage. Thank you.

Attendees:
In Person: Susan Furniss, OHIONET
Fran Fleet, Tiffin University (Chair) Jami Kumar , OHIONET
Elizabeth Zeitz, Otterbein College Matt Polcyn, OHIONET
(Secretary)
Linda Warren, Heidelberg
Blair Mercier, Malone
Stephanie Roach, Mt. Union Jeannie VonDeylen, Defiance
Joy Plassmen, Trinity (Vice-Chair) Elaine Funk, Muskingum
Barb Easterday, Bluffton LuAnn Boris, Franciscan

Via Elluminate:

Agenda: as sent ahead of time by Susan Furniss:
I. Introductions
II. OPAL Acquisitions website page
III. OPAL Strategic Plan Service Options
IV. Standard for entering brief bibs
V. Checking Millennium for existing bibs
VI. Acquisitions Standards and Procedures review
VII. Posting invoices, payfile, what information should be kept?
VIII. Fiscal Close procedure
VIII. Going forward — group organization & miscellaneous
X. Set date for Fall meeting

After the introductions and the welcome, we began by discussing the newly-reorganized and cleaned up Acquisitions webpage accessible via the OPAL website.

➢ To get to the webpage: OPAL website – Groups – Interest Groups – Acquisitions
➢ It currently contains:
  o Minutes from the 1999 Fall meeting
  o Elluminate recording of the 2009 Fall Q&A Meeting
  o Agenda, notes, Elluminate recording and handouts for the Spring 2010 Meeting
  o Fiscal Close FAQ
  o Summary of Fiscal Close Methods
  o Funds out of Balance Procedures
➢ We can develop this website as a shared resource, adding materials to it as needed
➢ We can submit documents through OhioNET for inclusion
Service Options for the Strategic Plan
We began by discussion any suggestions or questions those present had.

- One question was asked about #16: Facilitate the promotion and provision of library services to distance and online students” and how this would or could pertain to the unsuppression of order records.
  - Would it help patrons to see that materials of interest were on order by being able to see the “on order” note in the catalogue?
  - Suppressed versus unsuppressed order records – many schools, it seems, do not suppress order records and a message appears in their catalogue that says “1 copy on order for x on y date” whenever an order record is created. Is this helpful for patrons?
    - When the R-date is filled in on that order record, the note changes to “1 copy processed” and stays as such for 30 days after the R-date entered in the record.
      - This was determined to be the most useful method for tracking and sharing this information in a multi-user system like ours. It minimizes the impact of one library on another and works in a time-consideration for most of the libraries in our system. The time frame can be revised based on updated cataloguing timeframes if we so desire.
    - This note can and will sometimes appear side-by-side with the “1 copy catalogued” note that emerges after the cataloguers finish their process; however, this conflict can be negated by simply suppressing the order record after the items been catalogued.
  - Some schools do suppress their order records, and have experienced confusion and problems whenever an order record (suppressed) is attached to an unsuppressed bib/item record.
  - Considering that there can or are problems for those schools that currently do suppress, would it cause more problems to make a standard that all order records should be unsuppressed?
  - Possible solution - are create separate, suppressed, bib records for those items that are already unsuppressed to eliminate confusion - necessitate the transferring of record information or the overlaying thereof during the cataloguing phase.
    - If this step was missed, the worst that would occur is that two complete bibs for the same item would exist and OhioNET would have to reconcile them. Matt Polcyn stressed that duplicates can be cleaned up
    - Brief discussion was made of the cataloguing procedure that begins by checking OCLC #'s and then transferring information to the proper bib number
    - Clarification was made of the fact that if there are no items attached to a record, HOLDS cannot be placed on that record
    - Circulation is supposed to periodically review all bib level holds
It was generally decided that while the good of being able to see items on order outweigh the problems caused, there are other ways of viewing order information:

- in Millennium, you can see which institutions hold an item or have it on order
- seeing that an order has been placed doesn’t necessarily tell you which location that item is going to be catalogued and sent to once it’s arrived (i.e. reserves or reference) or if someone has specifically requested an item be HELD for them upon cataloguing

No recommendation regarding requiring unsuppression or suppression is made – the suppression ( <code 2> = s ) or unsuppression ( <code 2> = z ) of order records is the prerogative of each institution.

- One final recommendation was made that if the acq person knows at the time of order record creation where an item is going to be going (reserves, folio, reference, etc) that they change the location code at the time of order record creation, thus possibly eliminating some of the confusion. However, no further discussion of this suggestion was held.

The group then digressed into a discussion of Vendors.

- The article in the April 26th edition of the New Yorker entitled “Publish or Perish”, which spoke to the practice of Amazon artificially holding down their prices in order to win a market share war with publishers & Google. The Acq group discussed how many use Amazon as their primary or largest % vendor (almost all of us) and what this artificial price manipulation could do to our statistics and our purchasing practices.
- Other vendors were mentioned: YBP, Baker & Taylor, Strand Book Store (www.strandbooks.com), Barnes & Noble Libraries, BookHouse: and their pros/cons were shared.

Returning to the Service Options:

- Another question was raised about #16: Facilitate the promotion and provision of library services to distance and online students
  - Question was asked about the impact or prevalence of e-books in considerations
  - Reference was made to the OPAL Electronic Resources Task Force
- A question was then raised about #20: investigate and implement if possible the means to better adapt our catalog to mobile technology
  - Why is it not higher on the initial rankings?
  - The general consensus is that the current catalogue is accessible from a variety of media in its current form
    - User services decided to set an 18-month moratorium on this discussion since the same question was raised numerous times resulting in the same consensus each time.
- Considerable emphasis was then placed on #18: Expand training opportunities for library staff
Acquisitions specific, it was stressed that there are layers of training that are required:

- A basic, introductory training packet, such as was suggested by Susan Furniss, that not only introduces one to the Acq. Module in Millennium but also to the core competencies required for the position.
- Then more focused and higher level, task or question specific, training should be available tailored for unique or advanced situations

- Lists of resources or easy shared access to previous training sessions would also be helpful

A brief discussion of #5/23: Provide support/training for centralized services was held

- Centralization for Acq would extend to statistics and reports that could be generated at the OHIONET level
- Opportunity to create a standardization of the Acquisition position with regards to shared activities – create “core competencies”
  - Standards exist for how information is to be entered, what types need to be shared, etc.
  - What we could do is develop a shared document that states all the different approaches we each have to acquisitions, the reports we all generate and how they are formed and the ways in which we use them to gather x or y types of information
  - By sharing these types of information, we can provide a detailed resource for each other and for new acquisitions staff at other institutions.
  - Allows for shared approaches and still gives freedom for “tweaking” at institution level

Finally, we chose our top 5 service option recommendations:

- #18 : Expand training opportunities for library staff
- #9/12: Provide central training and support for digitization. Accommodate users with disabilities: Develop and share alternative formats for users with disabilities
- #16: Facilitate the promotion and provision of library services to distance and online students
- #11/17: Make our presence felt in the academic library community to assure a flow of new colleagues via hosting library practicums and internships, attending career nights, and sending students to conferences. Adopt social media tools and networks for marketing and information access
- #5/23: Provide support/training for centralized services (consulting, training, editing, enhancement, duplication), including instructional technology services, ILL, technical services, etc.
  - Elizabeth Zeitz volunteered to send these to Lois Szudy, Co-Chair for the Strategic Planning Task Force, which she did Thursday April 29th, 2010, in the am.

Acquisitions Standards and Procedures:

- Reviewed the procedures and guidelines for creating brief bibs, drawn from the Cataloguing standards and shared in the acquisitions S&P on the webpage
➢ Again discussed the possibility of creating a training package to share with new staff that provides an overview and introduction to position and procedures
➢ Discussion turned to how to maintain open and fluid communication between members of the group
   o How do we establish the “core competencies” (for lack of a better term) required for each position
   o Emphasize the ties between the system and each institution especially those things that are uniform and those that are unique
   ▪ It was discussed that the group create a wiki to develop these documents
   ▪ Emphasized that the group should utilize the Acq List more often – opportunity to email questions and comments, tips and hints, and share with the group
     • Understand that those that can respond will and should if they can share information or provide guidance
   o It was asked that the Acq group be made aware of new Acq staff at member institutions as part of the greeting/mentoring program
   o Stressed that important information is shared through the main OShare List and if we’re not on it, or if it’s set to ‘digest” that we get on the list and change the format

**Going Forward: Group Organisation and Miscellaneous:**
Take ownership of our interest group. To that end, volunteers stepped forward. Thank you to:
**Fran Fleet, Tiffin, Chair**
**Joy Plassmen, Trinity Lutheran, Vice-Chair**
**Elizabeth Zeitz, Otterbein, Secretary**
The proposal was made that going forward we’d operate on a rolling-vice chair position.

Briefly, payfile questions were addressed. Payfiles are the four “sessions” options visible after opening the Invoice function – where you enter invoice information. Different users can enter information into different payfiles and it is possible to then see how each payfile affects the funds.

We ran out of time to discuss Fiscal Close, but Susan reminded us that the Elluminate training session, the FAQ, and procedures are available through the Acquisitions webpage. Information can also be sent to us by Susan if we need.

**Next Meeting: OPAL Conference, August 2010 – Acquisitions Breakout Session**
Agenda forthcoming

**Next Meeting: Late October or Early November 2010, a Wednesday**
Please consider all available options and bring the information to the OPAL conference or share it via the Acq List.