

# Overview and Objectives Document

## DISCOVERY & ACQUISITIONS UNIT, 2024-2025

### Overview:

The Discovery & Acquisitions unit acquires, maintains, and makes discoverable and accessible through a wide variety of resources for library patrons. It does so by curating the Library's general collection, including print, media, e-resources, and government publications, and by facilitating borrowing and lending requests from other libraries. To enhance the general collection, unit members review information about new products, renewals, usage, requests, and costs to make recommendations to library decision makers. The unit also fulfills patron requests via interlibrary loan, Summit, and digitization for resources not held by the library itself.

### Library metrics:

- Electronic Resources (Primary responsibility)
- Physical Circulation (Primary responsibility)
- Resource Sharing (Primary responsibility)
- Course Reserves (Relevant)
- Online Catalog (Relevant)

### Objectives:

- **OBJECTIVE #1: Acquire, activate/process, and maintain accessible general collection resources in a timely manner.**
  - **Why:**
    - To provide the university community with accessible, interdisciplinary resources needed for coursework, research, and lifelong learning.
  - **How:**
    - Investigating and communicating resource options to stakeholders.
    - Accurate and timely orders, invoices, processing, and activations.
    - Maintenance of discovery systems.
    - Accepting and processing general collection donations.
  - **Success looks like:**
    - Quick acquisition and availability of accessible resources that meet the needs of the university community.
    - Easy discoverability of available resources.
  - **Fall 2024 Update:**

- During the fall, the following number of POLs were created: 131 ebooks, 1 e-journal; 631 physical books; 3 physical journals.
    - 3,769 items records were added.
    - The EBSCO ebooks clean-up project resulted in all but 359 ebooks fixed (from an original 5,000+)
    - Autoholdings were set up for Elsevier, JSTOR, Project Muse, Ebook Central, Springer, Taylor and Francis, and Wiley.
    - The bindery process resulted in 310 (306 periodicals, 6 books) items being sent to and returned from the bindery.
    - Processed 277 donated items.
  - **Spring 2025 Update:**
    - 179 electronic resources POLs and 1,147 physical resources POLs were created.
    - 7,121 item records were added.
    - Quickly addressed a large water leak in the basement, withdrawing damaged items and shifting to prepare for floor restoration.
    - Upgraded JSTOR to incorporate 8 new products.
    - Undertook a big reorganization of the 2<sup>nd</sup> floor newspapers collection
    - Began the configuration process for enabling the GOBI API for acquisitions.
    - Transitioned from Marcive records for government publications to the use of OCLC's Worldshare Collection.
    - Began processing Special Collection's new Kolln materials.
    - Checked 131 serial items for holdings accuracy between book storage and stacks.
    - Processed 100 donated items.
    - Provided resource suggestions to the M
    - arcom team for promotions of library resources in each newsletter.
    - Development of a Primo analytics dashboard for Discovery Team use to analyze Primo usage trends.
  - **Final Outcomes:**
    - Day-to-day and clean-up operations continued with no major challenges this year.
    - Over 10,000 new items were added to the catalog. These include not only new resources, but also batch added items from collections as well as some retroactively added government information publications.
    - New processes were developed, including autoholdings, WEST print serial withdrawals, and government document record loading.
  - **Challenges and Opportunities for Next Year:**
    - Work with the new GOBI API and the new Rialto/Collecto platform.
    - Continue withdrawing print serials based on WEST holdings
- **OBJECTIVE #2: Continually monitor and assess use of electronic collections and, in conjunction with Library leadership, strategically manage subscriptions and acquisitions to maximize return on investment and utility to the university community.**
  - **Why:**
    - To provide the widest possible range of useful resources in a financially responsible manner.

- **How:**
  - Gather and analyze cost-per-usage statistics for ongoing electronic resources
  - Provide projections early in the fiscal year as to what subscriptions are the best candidates for cancelation at renewal time.
  - Develop and enact strategy for long-term planning by taking into consideration multi-year subscriptions.
  - Gather and analyze request data and purchase requests to identify collection deficiencies
- **Success looks like:**
  - Accurate and timely review of subscriptions for decision-making purposes.
  - Low CPU subscriptions.
  - Staying within budget.
  
- **Fall 2024 Update:**
  - The unit continued to provide CPU data and FY projects to the Collections Team for decision making purposes in advance of each team meeting. By the end of Fall 2024, the team had reduced expected inflation by \$57,220 by cancelling underperforming subscriptions. Work on gathering and analyzing request data remains to be done.
- **Spring 2025 Update:**
  - The unit continued to provide CPU data and FY projects to the Collections Team for decision making purposes in advance of each team meeting. By the end of Spring 2025, the team had reduced expected inflation from an initial projection of \$96,412.85 down to \$2,989.10 by identifying \$103,694.17 in cancellations.
  - Initial configurations of COUNTER loads of 5.1 have been set up.
  - Reharvests of ebook (TR\_B1) stats occurred due to concerns about lower than expected numbers.
- **Final outcomes:**
  - The unit continued to refine reports for the Collections Team, editing, creating, and sunsetting Analytics reports as needed.
  - We opted not to continue using LibInsights due to limited reporting capabilities with it.
- **Challenges and Opportunities for Next Year:**
  - The unit will need to adjust reports as needed to account for the updates to COUNTER 5.1.
  - The unit still needs to identify processes for analyzing request data in order to guide decision-making processes.
  
- **OBJECTIVE #3: Continually monitor and assess use of print resources and, in conjunction with Library leadership, strategically manage approval plan and firm order acquisitions to maximize return on investment and utility to the university community.**
  - **Why:**

- To provide the widest possible range of useful resources in a financially responsible manner.
  - **How:**
    - Gather and analyze circulation and cost statistics for firm and approval acquisitions
    - Gather and analyze request data and purchase requests to identify collection deficiencies
    - Share CPU and subject trends with selectors.
  - **Success looks like:**
    - Accurate and timely review of circulation and cost statistics for decision-making purposes.
    - Steady or increasing use of firm and approval plan acquisitions.
    - Staying within budget.
  - **Fall 2024 Update:**
    - The creation of reports with circulation statistics for approval plan items began in the fall. A general report with all call number ranges was first produced. At the request of the Collections Team, two additional reports (with loan numbers, publication date, and receiving date) with individual call number ranges (E and QC) were produced. Work to create similar reports for firm orders will continue into Spring 2025 for comparison.
  - **Spring 2025 Update:**
    - Approval and firm order circulation reports were combined into a single report by call number range, both to help with approval plan revisions and to share with liaisons. The team is heading into summer with plans to make recommendations by call number for needed changes.
  - **Final Outcomes:**
    - This objective was slow to come to fruition this year, but at this point we have a plan going forward to make recommendations regarding the approval plan.
  - **Challenges and Opportunities for Next Year:**
    - The LRFOT (approvals, reserves, ILL, replacements) went over its allocated budget in May. Next fiscal year, we will undertake a revision of allocations based on the Collections Team recommendations for firm orders and approval plans.
    - Although we are at a point of making recommendations for the approval plan, we still need better communication with liaisons and a process for communicating circulation numbers with them. That said, this may be a Collections Team, not a unit, issue.
- **OBJECTIVE #4: Ensure quick and accurate fulfilment of patron requests for items not currently held by the library.**
  - **Why:**
    - To provide patrons with the resources they need for coursework, research, and lifelong education.

- **How:**
  - Fulfill borrowing and lending ILL, Summit, and digitization requests.
- **Success looks like:**
  - Steady or increasing fill rates.
  - Steady or decreasing cancellation rates.
  - Timely communication with patrons when challenges arise.
  
- **Fall 2024 Update:**
  - A patron satisfaction survey was created and embedded in notification emails and the Illiad platform. Two responses had been received by the end of the semester.
  - Summit fill rates continue to be consistent with previous semesters
  - ILL lending rates continue to exceed borrowing rates, and appropriate team members will be meeting with our ILL rep in January to discuss how to adjust our automated rejection configuration and our fees structure to try and address this disparity.
- **Spring 2025 Update:**
  - Met with our OCLC Illiad rep to adjust configuration settings, including our fees structure.
  - Borrowing rates were higher in the spring than the fall.
  - Lending requests were 188% higher than borrowing requests.
- **Final Outcomes:**
  - Lending and borrowing rates continued to rebound from their pandemic-slump five years ago.
  - Adding in a student worker to ILL was vital in keeping up with increasing numbers.
- **Challenges and Opportunities for Next Year:**
  - Hire a new ILL supervisor.
  - Evaluate whether changes in fees structure had any impact on the number of lending requests filled.
  - Rapido implementation!

**Metrics:**

- [# of electronic collections spot checked for linking issues per year.](#)
- # of POLs and invoices created each year (Can be found in Analytics)
- ~~# of new resources (print and electronic) acquired each year~~
- [Beginning of the fiscal year inflation projections.](#)
- [Overview of previous year's CPUs for year-long planning.](#)
- [Overall cost per use for each renewal](#)
- [Aquisition costs and circulation numbers for approval plan by LC range and for firm orders by liaison fund.](#)
- [ILL](#)
- [Summit](#)
- [Digitization](#)

**Membership**

Rami Attebury, Associate Dean (Acting Unit Head)

Samantha Thompson-Franklin, Collections & Government Information Librarian

Clinton Johnson, E-Resources Manager

Rachel Kerr, Library Technician/ERM Assistant

Matthew Strupp, Copy Cataloging Assistant

Abby Kirkham, Technical Services Assistant

Victoria Kerr, Resource Sharing and Reserves Manager

Dakota Willett, ILL Supervisor

Dakota Woodward, ILL Assistant

**Reporting:**

Unit Head and Collection Development Librarian report to the Dean.

E-Resources Supervisor reports to the Unit Head.

Librarian Technicians report to the E-Resources Supervisor.

ILL Supervisor reports to Unit Head.

ILL Assistant reports to ILL Supervisor.