Purdue University

Charleston Library Conference

Streamlining and Advancing Collection Development With GOBI: Bringing Your Collection Into the 21st Century

Christa E. Poparad
College of Charleston, poparadce@cofc.edu

Lindsay H. Barnett
College of Charleston, barnettlh@cofc.edu

Sarah Hoke
YBP Library Services, shoke@ybp.com

Follow this and additional works at: https://docs.lib.purdue.edu/charleston

Part of the Library and Information Science Commons

An indexed, print copy of the Proceedings is also available for purchase at:
http://www.thepress.purdue.edu/series/charleston.

You may also be interested in the new series, Charleston Insights in Library, Archival, and Information Sciences. Find out more at: http://www.thepress.purdue.edu/series/charleston-insights-library-archival-and-information-sciences.

Streamlining and Advancing Collection Development With GOBI: Bringing Your Collection Into the 21st Century

Christa E. Poparad, College of Charleston
Lindsay H. Barnett, College of Charleston
Sarah Hoke, YBP Library Services

Abstract

Based on a desire to transition from a paper-based acquisitions system to a completely online system, College of Charleston Libraries have used the features in YBP Library Services' GOBI[3] (Global Online Bibliographic Information) to streamline firm order selections, to expedite and make more transparent the firm order process, and to advance our collection development efforts.

Introduction

There are three key components in our firm order process: the liaison structure between the College of Charleston Libraries and the teaching faculty, our approval plan, and GOBI.

Liaison Structure

Each department at the College is appropriated a portion of the firm order budget to purchase library materials based on the department's student enrollment and faculty research needs. To facilitate communication, each academic department chair appoints a member of the teaching faculty as a departmental liaison while the Assistant Dean for Technical Services and Collection Development appoints a librarian or library staff member as a library liaison to spend the money allocated in each fund. The departmental liaison solicits materials to order from the faculty and passes these orders to the library liaison who selects the materials in GOBI. In addition, library liaisons suggest potential materials of interest to the faculty using the tools available in GOBI.

Approval Plan

In recent years, the College of Charleston has put a great deal of effort into refining our YBP approval plan. It has become the launching pad for expanding and advancing collection development services. YBP works with a number of publishers and profiles thousands of titles each year. We have been satisfied with the quality and range of titles available through this service, and began receiving our print approval plan titles fully cataloged and shelf-ready in 2012. Our approval plan profile, which incorporates our collection development goals, librarian input, and YBP bibliographer recommendations, identifies content of interest based on our stated collection development needs. Profiles are built on key pieces of data, including library generated specifications concerning series, publishers, subject areas, price, format, and other criteria. In addition to continually providing automatic shipments for print books of interest, e-book content can also be provided. Furthermore, an approval plan profile can be used to drive notification slips to help library liaisons and faculty find additional titles of interest and to drive the content for a demand-driven acquisitions (DDA) program.

The titles covered on approval carry typical bibliographic data, but also include information provided by YBP's book-in-hand (and now sometimes book-on-screen when e-books are available) profiling process. Each title is reviewed thoroughly to determine additional details about the content of the title, such as whether a title is more appropriate for research purposes, whether a title was edited by someone of interest, if an author has affiliation with a specific university, and whether a title has a focus on a special topic (like environment or religion) that may not be evident in its classification number. The tags supplied by YBP and the parameters of the library's profile combine to determine whether a title is fit to be purchased automatically, if it is

best to review the title before purchase (i.e., to send a notification slip), or whether it would be best to exclude the title altogether. We were also able to create a faculty-specific approval plan with YBP at the College of Charleston, and when any of our faculty produce content with the publishers YBP profiles, those titles are auto-shipped to us on a separate subaccount.

Setting up GOBI[3]

GOBI is YBP's portal to review and purchase content of interest. With a variety of features and workflow options, it is important to collaborate with YBP to find the best workflow, and customize the GOBI setup to reflect that workflow. Key component links in GOBI for the College of Charleston's daily workflow are the following: purchase history including library catalog holdings, whether a title is part of DDA, table of contents when available, book reviews, and library activity.

Logins can be provided for an unlimited number of users, as long as they have an institutional email address. User profiles allow the flexibility to provide certain features such as requesting titles or allowing the ability to order titles or manage other GOBI users. At the College of Charleston, all of our liaisons have "Select Only" status, which allows them to submit title selections only. Our Acquisitions Manager is the only person with permissions to place orders, which has been a great help to us in reducing error and preventing duplication of effort. Custom user profiles can be created allowing users to define their own workflow based on what they have the capability to do.

Some key options in use at the College of Charleston to optimize GOBI include the following:

Preferences

Under "General Cart Preferences," setting the "default title view for list results" to "full" displays links to features such as library activity and reviews. These can aid in determining whether to select a particular title. In addition, under "Basic Search Preferences," the default search field and Boolean operator can be configured.

GobiTween

YBP Library Services can work with a consortium to allow individual users to view what has been purchased by other member libraries. In the past year, this has also expanded to identify print versus E-Book purchases, member library versus consortium purchases, titles active in DDA, and titles that were purchased as part of an e-collection. There is a GobiTween view in place for the Partnership Among South Carolina Academic Libraries (PASCAL), of which the College of Charleston is a part, to see which items other member libraries have purchased.

Peer Group

Each user can create a peer group of other institutions with purchase activity at YBP which will allow the user to see if a title under consideration has been purchased by comparable or aspirational peers. While GobiTween is pre-configured by YBP, a peer group is customized by the individual user. This feature is helpful when evaluating titles that may be considered for accreditation and collection assessment purposes.

Templates

Templates speed the selection process for liaisons by prepopulating fields such as subaccount, fund code, quantity, and selector initials. This feature is especially useful when prompted to enter order details.

Streamlining Firm Order Selections

Our workflow is configured with the library liaisons as selectors in GOBI. Departmental liaisons inform the library liaisons regarding titles they would like to have in the collection. The library liaison then researches the titles, selects, and submits them in GOBI. The orders are then reviewed and placed by the Acquisitions and Electronic Resources Manager.

Slips

Slips are lists of titles sorted by fund code that are delivered electronically in GOBI which can be automatically distributed to faculty and staff by email using the notification process. Slips are based on our YBP approval profile and represent

areas in which we may be interested in purchasing books but do not wish to have titles shipped automatically. Library liaisons deliver slips to their assigned departmental faculty, and many faculty members use these lists as a method of identifying books they would like us to purchase as firm orders. This is an effective way to build the collection while ensuring that the titles we purchase are high quality and serve the research needs of our institution. In some subject areas, the number of slips can be overwhelming. In these areas, the librarians can assist faculty by using the special features in GOBI to email a selection of pertinent titles.

Searching for Titles

When faculty make requests, the following are used most often for selecting titles.

Basic Search

For individual titles, basic searching by keyword, ISBN, title, author, subject, and table of contents is available from the initial screen.

Add Titles by ISBN

This feature allows a GOBI user to add a number of ISBNs to a list in GOBI at one time. For example: if a collection list is available outside GOBI, the ISBNs for the titles of interest may be added to either a folder, the select cart, or the order cart. This removes the lengthy process of typing each individual ISBN into the basic search, finding the title, and then adding it to a folder or cart in GOBI. This feature is especially useful when faculty members email lists of titles or send catalogs with circled items to their library liaisons.

Advanced Search

The advanced search feature has been invaluable to us as we attempt to recognize and develop underserved areas of our collection. This is the most powerful tool for collection building in specific areas as it provides a number of limiters to define your search. You can limit your search to a specific format, LC range, subject, YBP select level, and publication date, among others. We have heavily used the advanced search tool to find books in less popular academic areas and interdisciplinary studies. In addition, the ability to

save search parameters saves time when it is necessary to run a specific search many times during the year.

Evaluating Titles

The following assist librarians and faculty members in evaluating titles under consideration for selection.

YBP Select Levels

YBP Select Levels describes the tag that YBP bibliographers assign to titles to help librarians be better informed about the titles they are selecting for their collections. Tags include "Basic-Essential," "Basic-Recommended," "Research-Essential," "Research-Recommended," "Specialized," "Supplementary," and "Not a Select Title." The profiling system, in addition to the title summaries and peer reviews contained in many GOBI records, has allowed us to better and more efficiently select quality titles for our collection. Rather than browsing through multiple publisher catalogs on a weekly basis for titles, we can now use GOBI and *Choice* reviews almost exclusively to make book selections. Our librarians have been satisfied with the quality of the titles we have purchased based on YBP Select Levels.

Reviews

When available, links within GOBI to reviews from *Choice, Doody's Book Reviews, Library Journal, Publisher Weekly, Book News*, and *Booklist* speed the evaluation process.

Library and Peer Activity

Library activity details the quantity sold to all libraries via YBP giving an indication of the popularity of a title. Local ISBN catalog holdings loads and purchase history help prevent duplicate ordering. GobiTween details orders among consortium member institutions. User created peer groups allow us to see which titles have been purchased by institutions to whom we compare especially for accreditation and collection assessment purposes.

Expediting the Firm Order Process

Export Cart

Using the export cart to place orders has streamlined and simplified our ordering process immensely. One major benefit of the export cart is that it acts as a storage facility for all the orders we intend to place, and orders can be manipulated, added, and deleted from the export cart prior to placing the order. GOBI also offers the ability to save records in the export cart as a PDF or email them, making paperless record keeping easier than ever.

"Batch" Import of Records

The most important feature of the export cart at the College of Charleston, however, is the capability to batch import records into our local ILS. The presence of extensive bibliographic information in GOBI such as full LC call number and subject headings indicates we will receive quality MARC records when the titles are imported into our catalog. Prior to using GOBI, our acquisitions staff imported MARC records from OCLC Connexion one by one before placing an order, entering in order details manually. With the use of the export cart, we can now import large orders, often 300 titles or more, into our ILS in one stroke and then FTP them to YBP. Order details are included in the export and order records are created when the data is ingested in our system. There is still some work to be done after the batch import—if our system matches a book with an individual or series title already in our catalog it will list the order with a status of pending, which will not allow it to be FTP'd. While these titles must be edited manually, this process is still far less time consuming and error prone than importing records individually from OCLC.

Multilibrary Campuses

GOBI also offers ease in managing purchases for multilibrary campuses. At the College of Charleston, we have several specialized libraries in addition to the Addlestone Library, which houses our general collection. The Marine Resources Library serves our Marine Biology graduate students, the Avery Research Center collects materials specific to African American culture in the South Carolina Lowcountry, and the North Campus Library serves working adults and traditional students seeking educational advancement. Each library has its own collection goals, and the acquisitions staff at the Addlestone Library manages collection development for all libraries. In GOBI, purchases for all libraries are displayed in one place, and librarians can create separate funds or subaccounts for each branch's purchases, making it easy to keep purchases organized. GOBI also offers a wealth of data for e-book titles that assists in making purchases for multi-library campuses. Most platform and purchasing options are listed on each e-book record, allowing the librarian to determine which level of access is most appropriate for his or her campus. Librarians can also purchase multiple copies of a title at once, if more than one library collects similar materials.

Transparency

Order Status Visible in GOBI

Another benefit of GOBI is that it creates an opportunity for library liaisons to be more involved in the acquisition process. All librarians in our institution have access to GOBI (though only the Acquisitions Manager can place orders), and can easily search by title or fund code to determine the status of any orders they have submitted. GOBI offers real-time tracking of orders, allowing users to see both when an item was shipped and its anticipated delivery date. This has been incredibly useful to us in the months leading up to the fiscal year end as we try to determine how much of our on-order materials will be received before the end of the year.

Invoices Posted

GOBI also acts as a storage system for all of our invoices for orders placed through YBP, on all of our subaccounts (firm orders, approval, DDA, e-book firm orders, etc.). This has allowed us to keep paperless records of invoices in one easily retrievable place.

Easy to Track Fund Expenditures

YBP keeps a record of all actions taken in GOBI for the last three years, allowing us to easily calculate

how much money has been spent on the approval plan, in firm orders, and in DDA in any given time period. Older data is available upon request, as well. This has proven extremely useful for end-of-year reporting.

Advancing Collection Development

Firm Order E-Books

Prior to using GOBI, purchasing access to e-books was a difficult and time-consuming process that our staff tended to avoid unless absolutely necessary. We typically had to purchase e-books directly from publishers, which not only meant less flexibility in platform selection but also signing any licenses required by the publisher and in some cases browsing through pages of legal documents to understand our rights in using the material. With GOBI, YBP facilitates contact between us and the content provider and we only have to sign one license with each provider that then allows us to make as many single-title e-book purchases as we wish. The invoices are delivered from YBP through GOBI, allowing for better purchase tracking and record keeping.

DDA

DDA only became a possibility to us recently because of the advanced purchasing ability and expenditure tracking made available to us through GOBI. We began a full-scale e-book DDA plan in the 2013-2014 fiscal year using YBP and ebrary. Our e-book profile was based on our existing approval profile and we had already completed a license with ebrary, so some of the essential elements of the plan were already in place. While we encountered many issues along the way with the plan that required creative problem solving,

we ultimately consider the program a success as we spent approximately $20,000 of our allotted $30,000 budget within five months. We have decided to continue with the DDA program permanently, with a $50,000 budget on a 12-month plan in the 2014-2015 fiscal year. Depending on the success of our program this year, we are also considering expanding into DDA for other material types, such as print and streaming media.

Consideration of E-Approval Plan

The success of DDA has inspired us to consider other methods of building a stronger e-book collection, which we feel is a valuable service to our patrons. We have been researching the possibility of establishing an e-approval plan, with the hopes of using this plan specifically to enhance interdisciplinary areas which are becoming increasingly popular fields of study. The fact that librarians can view titles for a period of time on the approval bookshelf before the order is completed allows for a great deal of flexibility in building a quality e-book collection, especially considering the breadth of academic subjects interdisciplinary studies cover.

Conclusion

GOBI offers a suite of services to help libraries manage almost all aspects of the acquisitions process. Libraries may wish to analyze their acquisitions workflow to determine how GOBI can assist them in reaching their goals. At the College of Charleston, we found that GOBI offered the tools we needed to expand, improve, and streamline our services, and to advance and update our collection.

References

Jones, D. (2011). On-demand information delivery: Integration of patron-driven acquisition into a comprehensive information delivery system. *Journal of Library Administration, 51*(7/8), 764-776. http://dx.doi.org/10.1080/01930826.2011.601275

Pickett, C., Tabacaru, S., & Harrell, J. (2014). E-approval plans in research libraries. *College & Research Libraries, 75*(2), 218-231.

Poparad, C. E., Barnett, L. H., & Hoke, S. (2014, November). *Streamlining and advancing collection development with GOBI©: Bringing your collection into the 21st century*. Concurrent session

presented at the 2014 Charleston Conference Issues in Book and Serial Acquisition, Charleston, SC. Retrieved from http://goo.gl/7MQIkh

YBP Library Services. (n.d.). *GOBI tutorials*. Retrieved from http://www.gobi3.com/hx/Falcon.ashx ?location=welcome