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A Status Report on Credit Card Use by Acquisitions Departments

by **Janet Flowers** (Head of Acquisitions, Academic Affairs Library, U. of North Carolina at Chapel Hill)
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Recent surveys conducted by **Janet Flowers** and **Katina Strauch** on **Acqnet** showed a significant surge of activity in the use of credit cards to purchase library materials.

Findings of Surveys

Katina's survey assessed the general state of affairs related to credit card use. Here are the findings from the 72 institutions replying (of which 17% were public and 83% collegiate). 58% of the respondents have personally used credit cards to purchase from an online bookstore. 82% of the institutions allow the use of credit cards for library materials. Most users (61%) have been using the card for more than one year. The credit limits range considerably but include either a per transaction limit and/or a time period limit. The uses varied widely depending

upon the length of time the card has been used, the nature of the institution, and local legal requirements. 81% of the respondents using credit cards for library materials use them for prepayments. Most vendors and publishers are receptive to credit card use. Librarians are slowly developing written procedures to cover use of the cards. General comments included enthusiasm for this new purchasing option.

Janet's survey ascertained how others were using the cards as well as their advantages and disadvantages. Respondents reported that they use a credit card for a variety of transactions. The nature of the orders includes rush, prepayments, videos, software

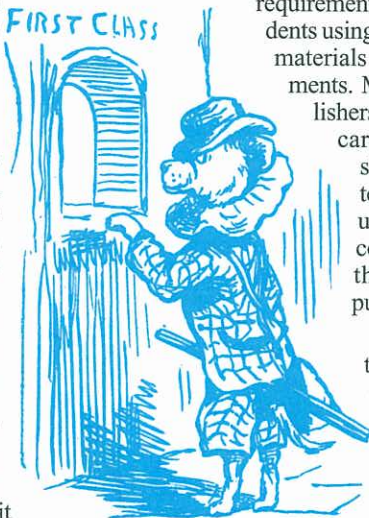
off the Internet, out of print items, conference proceedings, etc. The sources for the orders include local bookstores, book vendors (including foreign ones), small one-time use book shops, desktop publishers, online bookstores (such as Amazon.com), and out of print dealers.

Advantages

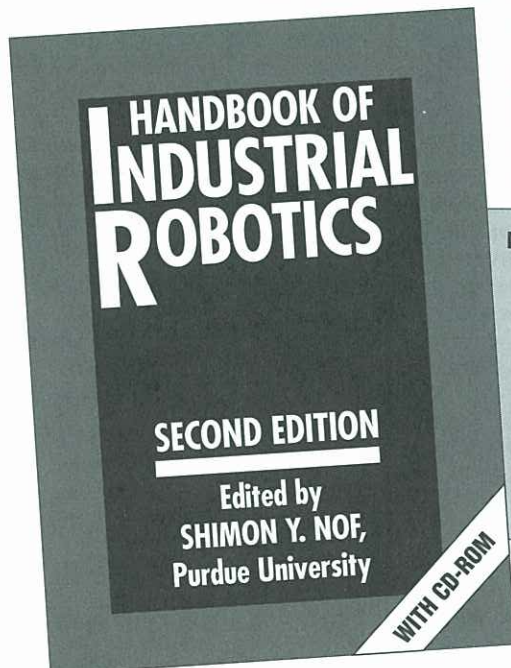
Those using a credit card cited the ability to acquire materials quickly and easily as the major advantage. Other advantages included 1) saving the institution money by reducing the number of checks cut, 2) eliminating or reducing the need to use petty cash, 3) decreasing the need for vendor maintenance for infrequently used vendors, 4) making Internet shopping smoother, 5) avoiding exchange rate issues with foreign vendors, 6) cutting paperwork at point of ordering, 7) increasing fulfillment rate, and 8) eliminating some deposit accounts.

Disadvantages/Implications

Despite being pleased to have a credit card,
continued on page 27



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Early years: I was born in western New York and spent much of my youth plotting an escape therefrom. I succeeded, but have come full circle, returning to New York in 1983.

Education and jobs: I have been Head of the Acquisitions Dept. at the University at Albany since 1984. My M.A.L.S. is from the University of Michigan; I have an M.A. in linguistics from the University of North Carolina at Chapel Hill. I have spent most of my adult life on college campuses and have worked in libraries at Michigan State University, Harvard, and Duke. For three years I was the Head Librarian of the Massachusetts Horticultural Library. I have done just about everything that gets done in libraries, with an emphasis on cataloging and acquisitions. I am particularly interested in how changes in the world of publishing impact on acquisitions work.

And then: In August of this year, I became Assistant Director for Technical Services at the University at Albany, continuing to manage the Acquisitions Dept. until a new head can be hired. This means I'm moving faster than ever and I have been accused of having a trap door near my desk!

Other life: Interests beyond libraries include gardening, crafts, hiking, nature study, writing, reading (mostly non-fiction, but I try to catch the latest **Sue Grafton, L.R. Wright** and **Sarah Paretsky** mysteries when they come out). Checking out the University of Colorado bookstore while at this spring's NASIG meeting resulted in my discovery of **Sarah Andrews'** mysteries and I've been enjoying them ever since. At the moment many of my favorite activities are hypothetical due to lack of time. I live in the foothills of the Taconics with one husband (a botanist), one son (a student who doesn't live there much any more, having shifted his focus to Cornell), one dog (an oafish German Shepherd), one cat (a beautiful calico huntress) and two sheep who serve as groundskeepers and wool producers. 

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the respondents overwhelmingly found that it is more work. The greatest issue is the reconciliation that must be done to match the purchases against the charges. Several noted that use of the credit card is more time consuming than the traditional purchase on receipt approach because of these extra steps. Use of the credit card requires another work flow and a new set of steps. In addition, there are policy issues regarding who is authorized to use the card. Several noted that their institutions required formal training before receiving the card. Other issues involved security on the Internet, with one person reminding others to delete cookies from their site after purchasing through a Web site. Finally, because of the various situations that

can occur (such as duplicate shipments or billings or multiple purchases from the same vendor), time must be allowed to reconcile the statements. Several institutions indicated that they do not use the credit card near the end of the fiscal year for this reason.

Impact upon Work Flow


The person authorized to use the credit card varied widely. It ranged from the Library Director to Head of Acquisitions to

individual staff within the acquisitions department. The result of this is that staff must coordinate with higher level staff on individual transactions, a situation that does not occur for routine purchases. Several noted the problems when the assigned authorized person was away or at a meeting. Most also noted that a different procedure has been established for receipt of the material. There was variation from this being a function of acquisitions or accounting. Wherever it occurs, however, there are additional steps not associated with the typical purchase.

General Comments

Although the surveys did not solicit advice, there were tips in the comments. Those using credit cards must be well aware of state law. Users must also be very

careful to meet auditing requirements for the transactions. Users should be

concerned about security of the card number and develop appropriate safety precautions. Finally, users must design appropriate tracking mechanisms to ensure appropriate receipts and expenditures. Obviously, use of credit cards cannot be done lightly; however, it is also clear that they offer new flexibility in procurement options that can enhance services. Also, they represent yet another step toward the electronic transfer of funds. 



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