Impact of Using GOBI on Workflow and Collection Development Decision-Making in a Theological Library

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I. Scope and Purpose

This paper describes the results of an assessment project designed to measure the impact of initiating approval plan services with GOBI® Library Solutions from EBSCO, formerly known as YBP Library Services (see gobi.ebsco.com), at a small, special library. Three librarians at Leo Dehon Library participated in the assessment which was designed by the author of this paper. The assessment was conducted in spring of 2015 near the end of the first full academic year of library staff experience with a new approval plan for print monographs in theology, religion, and philosophy. The library serves a school of theology/seminary with an annual monograph budget of $16,000. This paper focuses on assessing the impact of using GOBI Library Solutions’ services in the first year. It does not describe the details of the process of working with GOBI Library Solutions staff to write the approval plan. Its purpose is to share factors that may influence decision-making about the use of approval plans in small libraries and to offer a model of assessing an approval plan.

In the author’s experience, it is rare for such a small and specialized academic library to undertake writing an approval plan and contract for approval-plan-related services. In many such libraries, expertise for starting up a new approval plan, especially expertise for profiling, may be lacking. Yet the value of an approval plan may be worth considering when a collection development program is evaluated for factors such as quality of the collection and efficiency/effectiveness of workflows. To that end, the rationale for Dehon Library undertaking a new approval plan with GOBI Library Solutions will be described in this paper (see section III, below). The design, implementation and analysis of the assessment of the impact of the change will also be discussed.

The purpose of the assessment was to measure the impact of the new approval plan on 1) collection development decision-making, and 2) technical services workflow. Results would be used in the broader context of helping the library staff gauge the value of GOBI Library Solutions approval services. Approval plan services were initiated as a pilot project at Dehon Library, and the project included plans to assess the change in the second year.

II. Institutional Details and Pilot Project Description

A. Library Mission and User Community

The mission of the Leo Dehon Library is to support the intellectual, pastoral, spiritual and human formation needs of the students and faculty in the Priestly Formation, Master of Arts, and other programs at Sacred Heart Seminary and School of Theology. Additionally, it serves the intellectual, pastoral, and personal needs of the staff, members of the Priests of the Sacred Heart, alumni, and registered patrons from the wider community. Size of patron community fluctuates, but in recent years Dehon Library has approximately 500 users with patron records in TOPCAT (the online catalog: https://topcat.switchinc.org/). Dehon Library held approximately 90,000 cataloged volumes in 2014-15.

The broader user community served includes patrons at the other seven member libraries of the SWITCH consortium with a shared catalog containing nearly one million items. SWITCH provides weekday delivery services to its eight member libraries.

Dehon Library acquires materials on a variety of primarily theological and philosophical topics, predominantly from the Catholic tradition, and secondarily from a variety of supporting fields and disciplines. It also acquires materials from other faith traditions as appropriate. It participates as a member of the SWITCH consortium, and it collaborates with other professional associations including the American Theological Library Association.

B. Collection Development of Monographs and Contracting with GOBI Library Solutions

Core Task. Title-by-title selection of books to add to the general and special collections in libraries is part of the rather complex professional work traditionally known as collection development. In small libraries with monograph budgets under $25,000 a year, it is more common than not to organize staff so that collection development is a core job responsibility of one or two professional librarians. These professionals are often helped by selections or recommendations from faculty and others in the institution who may have a formal role as liaison or, less formally, an
invitation or request to participate in materials selection. Other library staff, including support staff, may also participate. The rationale for this traditional arrangement of collection development work is that library professionals are trained in scouting out resources in subject areas for their collections and they possess the skills and judgment to select and manage materials for the collections. The help received from other experts such as faculty and others who teach and do scholarship and research is also valued and comes most often as recommendations or selections. The expert helpers often use the same types of sources for selection as the librarians. These sources include publishers’ catalogs, reviews in general and specialized journals and publications, and notifications and mentions of titles from others in peer networks.

**Approval Plan Function.** Approval plans, even modest plans, have significant advantages in streamlining some of the very time-consuming work of the collection development process, such as title-by-title selection of monographs. That is because the collection development dilemma, for libraries of all sizes that purchase monographs, is how to select the materials that are needed, or likely to be needed, and which are important for either breadth, or depth, or both, in the collections in various subject areas. In theology and religion, for example, in addition to many university presses that publish materials in those subjects, the list of non-university press publishers that GOBI Library Solutions covers includes about 100 publishers. Regular review of titles offered by hundreds of publishers is time consuming. Thus, speed and efficiency are important factors in using approval plans because the human resources, including time spent and expertise involved in the work, are considerable.

The long-standing and excellent reputation of GOBI Library Solutions in providing services to academic and research libraries, the coverage of publications in scores of subject areas by GOBI Library Solutions, and the functionality of the GOBI system, are mentioned here as primary reasons for launching an approval plan in a small, very specialized library with this company.

**Choice and Control.** To give a sense of coverage, the number of title notifications that Dehon Library staff were able to review and select from using the GOBI system in GOBI Library Solutions profiled areas of religion, theology, and philosophy ranged between 2,500 and 3,000 in both 2014-15 and 2015-16. These selections, from a much larger universe of titles in the same subject areas, matched the subject and non-subject parameters in the profile for the Dehon Library approval plan. It is important to mention here that profiling includes decisions about publisher coverage, and determining subject and non-subject parameters, and that these parameters control approval plans. The parameters determine very specifically what the plan will cover and how it functions. Non-subject parameters include factors such as format, level, audience, treatment, price, publisher-type, etc. Commonly, adjustments are made to the plan’s various profiles (or sub-profiles) on a regular basis using GOBI management reports and through a library-defined process of evaluating plan performance.

**How it Works.** The GOBI system is used to regularly review batches of selected titles in the library’s approval plan. Dehon Library’s plan is set up so that the librarians select from online notification “slips”; the budget for monographs is so limited that this set up works best. However, many libraries set up their plan so that some titles are sent “automatically” on approval (based on profiling and criteria) and other titles are selected from a notification slip plan. In the slip plan, librarians review slips containing bibliographic and other information about the item, and they then select and order titles within the system. Notifications from GOBI Library Solutions of new batches of selections available for review are received biweekly. Specifics of the selection and ordering process that relate to the concerns of this impact study, specifically decision-making and workflow, will be discussed in the results section (VI), below.

**C. Library Holdings and Budget**
Approximately 400-500 new monographs were purchased and added to the Dehon Library circulating collection in 2012-13, 2013-14, and 2014-15. As mentioned in section II above, the library is small (under 90,000 cataloged volumes). Library staff selected most materials (85%). The library director’s
responsibilities include more than 50% of the selection, reviewing and approving all orders, and overall leadership and management of the collection development program. Recommendations for materials were made by teaching faculty as well as a few students. In 2013-14, collection expenditures for books, including reference titles, totaled approximately $13,500. Monograph allocation in 2013-14 and 2014-15 was $16,000. Print monographs and sets were purchased, not e-books, though library staff evaluate e-book offerings and plan to develop a strategy for e-book acquisition in 2015-16. Library expenditures for journals, databases, and library systems totaled nearly $70,000 in 2014-15.

D. Initiating Services with GOBI Library Solutions
Dehon Library contracted to receive GobiExport records that are MARC-formatted containing bibliographic information from the GOBI database. The records contain library-specific information entered by library staff prior to export. The GobiExport records support checking for duplicates and order creation in the automated library system, obviating the need for local keying of bibliographic and order data. Standard GobiExport records are brief, upper-case records derived from the bibliographic data presented in GOBI. GOBI Library Solutions offers additional technical and other services. A per-title discount was negotiated in the contracting process. Dehon Library would receive free shipping (for items ordered non-rush); shipments were sent out every two weeks. There was no charge for use of the GOBI system or profiling. The library also contracted for the Review service which provided reviews from several sources (where available) that are helpful to look at when reviewing notification slips in GOBI.

III. Reasons to Use an Approval Plan & Related Services

The following reasons were important to Dehon Library staff in moving to an approval plan:

1. Using professional time and expertise for selection rather than the busywork of rounding up, sorting through, and studying publisher's catalogs, and reviews in specialized and general sources.
2. Decreasing dependence on staff locating and reading book reviews in a variety of online and print publications. This enables reviews to function as a second line guiding title selection, rather than a primary line. Staff noted that heavy dependence on reviews has its own set of problems such as timeliness, ease of workflow, routing, etc.
3. Ensuring responsible stewardship of the monograph budget with a predictable discount, predictable shipment schedule and acquisition costs, and better management using various GOBI system reports that track expenditures and supply customized reports by subject, publisher and other elements for collection analysis.

IV. Goals, Assessment Method and Drivers of the Pilot Project

A. Goals
In anticipation of the pilot project, the plan to assess the move to the GOBI Library Solutions approval plan and, specifically, its impact were included in the library's strategic plan. Under the overarching goal of “providing excellent materials and collection-related services,” was the specific objective for 2014-15 of evaluating the impact of GOBI Library Solutions/GOBI on 1) collection development decision-making; and 2) technical services workflow.

B. Method: Practical Assessment
The assessment method chosen for this project was a distinctly practical method rather than a study employing a more traditional research method. Assessment methods can be chosen based on criteria that develop from local need, including the need to develop projects that can be accomplished in-house at low cost with available resources. Criteria for choosing an impact study at Dehon Library included: 1) alignment of method with project goals; 2) projection of how results will likely answer the investigative question of “what do we most need to know?”; 3) ease of implementation; 4) expectation that results would provide useful data for decision-making; 5) the need to provide documentation of assessment results to library staff and other stakeholders; and 6) the anticipated value to the organization of the project design process (such as increasing collaboration, development of project management skills, an exercise in team
The expectation of the project’s value to staff was very important at Dehon Library, where past assessment experience was limited to primarily informal methods and user surveys. The specific objectives relating to value of the assessment to library staff included the need to:

1. enable the sharing of assessment data between librarians;
2. energize librarians with data gathering that could be prepared in a few hours;
3. allow for enough granularity in reporting of results to facilitate further investigation and follow-up;
4. provide an assessment experience that would produce useful results and lead to greater levels of engagement in future assessment projects;
5. provide evidence of impact based on one year of experience with the GOBI system; and
6. leverage the professional expertise of the participants.

C. Key Drivers

Technical Services Workflow

Technical services processes include pre-order searching, integration of order records with the LMS, status reporting, cataloging, acquisitions tracking, and record maintenance related tasks. Technical services workflow studies sometimes employ methods like diary studies, where staff track counts in a given time period and these data are used to analyze workflow issues. Certainly, results from the impact study at Dehon Library are less precise than results gained from more formal methods of time tracking such as diary studies. These methods would likely be used to conduct a more data-intensive research study of technical services workflow study aimed to measure not only time saved by an improvement process but also to calculate cost savings.  

Collection Development Decision-Making

Library science is a tremendously rich field in the social sciences, distinctive in having a good deal of applied research that is ever-useful to professionals in various types of libraries. Yet the subspecialty of collection development, in particular, is rather lacking in the practical research that is often needed in libraries to guide decision-making and management strategies to ensure quality and efficiency of operations. We need more compelling methods of measuring the quality of collections and to strengthen our knowledge base to define competencies required in collection developers. If we give any academic library advisory committee an invitation to ask questions about library operations, the question “How do you decide what to buy?” will invariably be asked. Yet the answer from the library administrator is nearly always unsatisfactory — it’s complicated. Where approval plans are mentioned as a way of managing some of the complex and even more practical aspects of materials section, then the assumption will take hold that profiling makes filling up the library with materials a rather automatic process. If this is the impression that use of approval plan services creates, it is not surprising that many librarians, too, might view approval plans with concerns about control. Some may not have encountered more than a few fundamental principles and practices of collection development in their library school coursework.

Quality as a Framework. Beyond collection development fundamentals is the issue that the quality of collection development decision-making is difficult to describe and measure. Like other efforts to measure quality of library services, the accuracy and effectiveness of collection-related assessment is very much dependent on the skill and judgement of the assessors. Nonetheless, in the small, special library setting at Dehon Library, we wanted to learn as much as we could about the impact of a major change in selecting and ordering materials. The three professional librarians on our small team proceeded with high levels of trust, collegiality and a very good understanding of the local collection, and, of course, the needs of the user communities we serve. We were very eager to gather data and analyze how the change to GOBI Library Solutions impacted decision-making.

Factors in Decision-Making. Collection development decision-making includes 1) selecting sources to identify titles published in a desired field (such as theology, religion, philosophy); 2) reviewing these sources and making selection decisions; 3) communicating decisions to technical services staff;
4) involving others (library staff and possibly faculty) in reviewing sources and selecting or recommending titles for purchase; 5) tracking expenditures; 6) analyzing patterns of expenditures to gauge necessary breadth and depth of the collection; and 7) a host of other “softer” decision-related-factors. If reviews are used as a primary source of decision-making, then the more negative aspects of dependence on reviews are worth noting as well, such as 1) lag time from publication to appearance in various review sources; 2) the quality of the review; 3) the fact that not all monographs are reviewed in a timely and systematic way in many subject areas, and most are never reviewed; 4) the time it takes to read and judge the usefulness of the review; and 5) the fact that time committed to reading reviews and selecting may be hard to measure and/or justify as a good use of professional time.

Then there is currency. In many fields, recent imprints circulate most in the first two years they are acquired. Though it is not unusual to hear librarians and even faculty say that speedy acquisition doesn’t matter all that much in the humanities, this author would note that humanities scholars, like any other specialists, are intensely interested in seeing new books for many reasons. Monographs do have a longer useful life in fields like theology and religion, but it would be a mistake to undervalue the speed and efficiency benefits of an approval plan to the user community. The author notes the appreciation expressed by Dehon Library users for monthly emails of New Library Acquisitions of print titles and media. The lists could add to the perception that the library is responsive and on top of its game. Observe the “New Books” area in any academic library and it becomes apparent that minimizing the importance of new current titles might be an assumption worth studying, if only informally, by observation and dialog.

V. Assessment Form

The purpose of the data gathering, described above in section IV, was important in the choice of method (using a reporting form and providing a template) and in the design of the form to be used to gather data for this assessment project. The library director developed a template to gather impacts from herself and two librarians. The impact reports were completed independently using the template as a form. Then the library director organized data gathering, compiled and distributed the results and set up a meeting for discussion. A sample item, below, on the impact of the GOBI Library Solutions discount, was prepared by the library director to model use of the template:

**Impact 1 workflow**

*Predictable 14% discount on most items*

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**How it affects workflow or collection development decision-making**

1. A decent discount means we don’t have to spend time looking for deals or waiting to order to get discounts.

2. Combined with free shipping on all (non-rush) items from vendor, this discount demonstrates good stewardship of library collection funds.

**Further comment**

This is a good % of discount especially considering we are a tiny customer for vendor spending around $15K/yr.

**Contributor:** Susanna

VI. Results

In addition to Impact 1, in section V above, which modeled the use of the form to collect the data, the results below capture 15 impacts as submitted by the librarians for the assessment. Contributors were Ann Owen, Resource Acquisition, Discovery & Management Librarian; Kathy Harty, Resource & Education Services Librarian; and Susanna Pathak, Director of Library and Academic Technology Services.
Impact 2 workflow
Streamlined recording of orders in ILS

Positive

How it affects workflow or collection development decision-making
1. Email acknowledgements do away with marked catalogs, reviews, advertisements for input in system.
2. GOBI export records supply critical brief bibliographical information.
3. This eliminates looking up and/or keying info into system.
4. Duplicate ordering is avoided.
5. Paper consumption is almost eradicated.

Further comment
Tech services time for ordering processes is at least halved.

Contributor: Ann

Impact 4 workflow
Dedicated GOBI Library Solutions Customer Service representative to answer questions and resolve issues with orders

Positive

How it affects workflow or collection development decision-making
1. Suzanne, our GOBI Library Solutions Customer Service rep, provides reliable answers and solutions in a very timely manner to all questions I email to her. Her predecessor was equally helpful and made the transition to my work with Suzanne seamless. I appreciate the collaborative relationship.

Further comment
Customer Service team is available for all aspects of this partnership.

Contributor: Ann

Impact 3 workflow
Predictability of shipments makes workflow manageable

Positive

How it affects workflow or collection development decision-making
1. This spreads out invoicing, cataloging, and processing of new materials into doable segments each month.

Further comment
This aids in regulating monthly creation of New Acquisitions list for SHSST community.

Contributor: Ann

Impact 5 decision-making
Collection development more intentional and thorough in Sacred Heart subject areas

Positive

How it affects workflow or collection development decision-making
1. GOBI notifications provide timely alerts to what is available in relevant fields, ensuring more thorough evaluation of relevant resources.
2. Notifications and available reviews in one place make efficient work of making selection decisions.

Contributor: Ann
Impact 6 decision-making
Wide selection of titles in subject areas profiled

- Positive
- Negative

How it affects workflow or collection development decision-making
1. We are able to select from a wider variety of titles/publishers than we might normally look at.

Contributor: Kathy

Impact 7 decision-making
Unavailability or cancellation of pre-pub titles

- Positive
- Negative

How it affects workflow or collection development decision-making
1. Sometimes the library at SFS gets titles in before we do, and then we have to decide whether or not to go ahead.
2. We may fall behind in acquisitions by not being able to order pre-pub; we need to remember to go back and re-order later.

Contributor: Kathy

Impact 8 decision-making
Workflow between three librarians

- Positive
- Negative

How it affects workflow or collection development decision-making
1. We still are working out how to notify each other of selections, although this is improving.

Contributor: Susanna

Impact 9 decision-making
System enables efficient and broad selection process

- Positive
- Negative

How it affects workflow or collection development decision-making
1. We receive timely alerts to broad range of materials published in subject areas in our profile.
2. It is an efficient system for decision-making due to GOBI record design elements including descriptors, table of contents, and some reviews from major reviewing sources.
3. As a selector, decision-making (weighing of factors) is helped by looking at a group of 100+ titles in one work session rather than piecemeal in catalogs and print and online review sources.

Further comment
- Time spent selecting materials is halved.
- Time saved not rustling through catalogs and review sources saves even more time.
- We are getting newer titles faster than we would with piecemeal selection process. Reviews, which so often lag behind publication, can now be used as a safety net to catch titles that we might miss or evaluate as 2nd priority.

Contributor: Kathy

Impact 10 workflow & decision-making
Collection development decisions shared via GOBI system

- Positive
- Negative

How it affects workflow & decision-making
1. We are still working out how to handle titles we don’t want to order right now, but later (more SP’s problem perhaps).
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**Impact 11** decision-making

**Decrease in faculty suggestions this academic year**

- Positive
- Negative
- Unknown

**How it affects workflow or collection development decision-making**

1. Reports of selections ready for ordering are shared via email among three librarians responsible for selection.
2. Status of items is available in the GOBI system; we spend less time investigating where we are with a title we want.
3. It is easy to return to GOBI system to review titles that were selected for SHSST because of subject profile match but not saved for order later.
4. It is easy to forward a notification “slip” via email to others for action or advice.

**Further comment**

All of the above save time and increase efficiency; accuracy is improved as records are in the system and not floating around.

**Contributor:** Susanna

**Impact 12** workflow

GOBI customer service has been excellent

- Positive
- Negative

**How it affects workflow or collection development decision-making**

1. I do not put off trying to solve a problem or getting help from our rep and our GOBI Library Solutions point people in profiling and technical services because they have an excellent record of responding in a timely way and their answers have been consistently on target.

**Further comment**

Even the process of profiling, which is notoriously difficult, was a great experience when it came to seeking help from GOBI Library Solutions staff to fine tune what we wanted to adjust.

**Contributor:** Susanna

**Impact 13** workflow

Some coordination issues with forthcoming books we know we want to order that are not yet published and/or not in the GOBI system

- Positive
- Negative (mild)

**How it affects workflow or collection development decision-making**

1. GOBI is not a bookstore but a selection system so we cannot select a title that GOBI Library Solutions indexers have not profiled. This makes sense but does require us to hang on to catalogs announcing forthcoming titles until those titles are available in the GOBI system for selection and ordering.
2. On the plus side, if we ordered every forthcoming title we want, the balance between Salzmann...
Library and Dehon Library would be affected as we would be more likely to order titles they might buy. With rapid delivery among the SWITCH consortium libraries, the two seminary libraries are able to provide materials quickly and reduce duplication as much as possible.

Further comment
- This requires some paper files to be kept and then further checking in TOPCAT before ordering.
- It's rare to be able to order titles “not yet published.”

Contributor: Susanna

### Impact 14 workflow

**Surprising number of older titles available from GOBI Library Solutions**

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**How it affects workflow or collection development decision-making**

1. This saves time when we can check on titles published several years ago and be able to order them at a discount.
2. This saves time with ordering and with importing records to catalog.

Contributor: Susanna

### Impact 15 workflow

**Learning curve with coordinating selection process using GOBI carts**

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**How it affects workflow or collection development decision-making**

1. Since we seemed to have bypassed training opportunities and just started trying to use the system, it has taken some time to figure out the cart system for items selected by the two librarians that require the library director’s review and approval before ordering.

Further comment
- There was more trial and error than I would have expected since librarians are so darn smart! We could have done more training up front (webinars, tutorials, documentation, asking rep for advice) and saved time.

Contributor: Susanna

### VII. Discussion and Analysis of Assessment Results

Library staff reviewed the impact report compiled by the library director and met to discuss each impact as well as to develop ideas for further investigation and action. The purpose of this paper is not to describe the specifics of those discussions and the post-assessment action plan, but rather to share the assessment method and provide a model of practical assessment carried out by the library staff and a model of an impact study.

Overall, it is clear that the impact of the change to an approval plan with GOBI Library Solutions at Dehon Library was strongly positive. The assessment results documented professional experience and judgement about specific impacts more concisely and fully than a less evidence-based approach like discussion at a staff meeting or a general call for evaluating the project. The assessment form was designed to keep the participants focused on the two impacts that were to be measured: technical services workflow and collection development decision-making. Indeed, it worked very well in keeping the participants focused on evaluating impacts.

The results were very useful to library staff. Results documented strong positives such as time saved, excellent customer service from GOBI Library Solutions, more efficient selection, more efficient
VIII. Recommendation

Dehon Library's experience launching a new approval plan with GOBI Library Solutions was excellent. The assessment results, which measured impacts of the change on technical services workflow and collection development decision-making, as this paper has documented, were strongly positive.

In the author's experience, it may be a challenge to move to an approval plan in a small, specialized library (e.g., fewer than 100,000 volumes), with a staff of 3 librarians and 1 monograph budget of $16,000, or to make such a move in larger libraries, as well, without the in-house expertise required to guide the profiling. The expertise includes understanding the fundamentals of subject profiling as well as how to control the plans with publisher coverage, control the plan with publisher coverage, subject-specific criteria such as call number ranges and historical period, and non-subject parameters such as cost, format, research level, audience type, etc.

The new approval plan at Dehon Library was created in just a few months after making the decision to proceed. The library director had experience with approval plan set up and profiling gained at other libraries and was able to lead the process and work to keep staff engagement at a high level. It should be noted that customer service staff at GOBI Library Solutions are able to provide much guidance at all points in the process, including creating profiles. Quite possibly, if there were additional ways to bring profiling expertise to small libraries, including creating profiles, it seems likely that more libraries of this type would contract for approval plan services.

A couple of the concerns could be addressed by staff education and software features, and by adding additional GOBI System features. Overall discussion of each impact built a greater understanding of how the approval plan worked and helped staff more effectively work with the GOBI system and its features. These outcomes made the impact assessment a valuable collaboration and learning experience for library staff.

Organizations including the American Theological Library Association and the Association of Theological Schools may have a role in developing support for libraries needing expertise in approval plan design and management.
Notes and Author Contact Information


2 The author of this paper notes that preparing library staff for the experiences of approval plan profiling and writing/fine-tuning profiles is a very important part of the process, but the how-to of that experience is beyond the scope of this paper.

https://topcat.switchinc.org/webasset/dir.html [accessed on April 26, 2018].

3 See “Size Doesn’t Matter: Book Approval Plans Can be Catered to Tight Budgets” by Clare Appavoo [of Coutts Information Services, Canada] in the Canadian Library Association publication, Feliciter, Issue #5, 2007, 238-40, for additional advantages to approval plans for smaller libraries and comparisons of Plan Types. [Note that Coutts has been acquired by ProQuest]

4 See for example, “Staff-Administered Diary Studies” in Richard M. Dougherty, Streamlining Library Services: What We Do, How Much Time It Takes, What It Costs, and How We Can Do It Better (Lanham MD: Scarecrow Press, 2008)127-34 and the chapter in the same book on “Costs,” 165-84. Note that discount rates are negotiated with GOBI Library Solutions and depend on a variety of factors.

5 Salzmann Library at the St. Francis de Sales Seminary in Milwaukee, and one of eight SWITCH consortial partners; Salzmann and Dehon are the two seminary libraries in the SWITCH consortium.

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