

¿Que Pasa?

The Official Newsletter of Amigos Library Services

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UTD Tracks Gifts, Donations with Voyager

Earlier this year the Eugene McDermott Library at the University of Texas at Dallas (UTD) began use of its Voyager Integrated Library System (ILS) and Excel inventory lists as a means of tracking gifts and materials donated to the library. Knowing that the accurate tracking of gifts and donated items is a challenge faced by many Amigos Members, ¿Que Pasa? recently visited with Dr. Mary Jo Venetis, Associate Director for Technical Services, to learn more about the decision to use the Voyager system in this manner and how it's working.

QP: Can you talk about the reasons that tracking of gifts and donated materials is important? For instance, is the tracking more about inventory or about the politics of gifting and recognition for the donor? This assumes the reasons for tracking dictate the approach you found to be most useful.

MJV: In December 2010, the Office of Development and Alumni Relations at UTD requested that we remove all references to credit card information on the library's printed and web forms. Dr. Ellen D. Safley, Director of Libraries, began receiving weekly reports from the Office of Development and Alumni Relations, recording the donors who gave materials to the library's Special Collections. These reports did not include gifts that went through the Acquisitions unit within Technical Services, and it raised questions on our end. It turned out that Acquisitions did not use the University's gift-in-kind-acceptance form. Acquisitions used their own gifts form, and these forms were not sent to the Office of Development for tracking. Consequently, all donated materials that went through Acquisitions were never recorded by the Office of Development.

It became imperative to have all donated materials received by the library be recorded to recognize and acknowledge donors for their donations. It was also necessary for the Office of Development to recognize the value of these donated materials, and in recognizing that value we needed to abide by IRS regulations. According to IRS procedures, the recipient of the gift cannot assign the dollar value because the library is an interested party. It is the responsibility of donors to have collections and/or gifts professionally assessed by

other parties. The Office of Development simply acknowledges the number of items received, rather than the actual dollar amount, as a way to recognize the "value" of donated materials. This allows them to meet the university's ongoing goal to raise funds to support its needs as a growing university. On its web page, the Office of Development acknowledges that the support from alumni, friends, corporations and foundations enables UTD to operate "with less than half of the university's annual operating budget coming from state assistance." Along these lines, the library also encourages donations, both monetary and non-monetary, in order to maintain traditional collections while expanding access to scholarly electronic resources.



Mary Jo Venetis

QP: How were you handling this important activity prior to your current approach? What was good about your prior approach, and what was lacking?

MJV: There is a staff member in Acquisitions who is solely responsible for handling the gifts upon receipt, although almost everyone at the McDermott Library is involved.

This is a common scenario prior to the revised procedures: a donor may drop off materials at the Circulation Desk or Reference Desk, or even through the library's book drop containers. The donor did not always know that he/she needed to complete a gift acknowledgement form. If library staff asks the donors to complete the form, the donor may decide to omit relevant information or refuse to complete the form, preferring to remain anonymous. In other cases, the donor may want an acknowledgment of their donation at specific times. For instance, there are some faculty members who prefer to receive an inventory list of their donated materials at the end of the calendar year for tax purposes.

However, we were not consistent in handling these donated materials because we did not always record donor names, addresses, etc. As mentioned earlier, Acquisitions also did not send these forms to the Office of Development.

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Gee Library Implements Relais ILL System



Jacob Pichnarcik

The James Gee Library at Texas A&M University-Commerce, Commerce, TX, an Amigos Member, recently upgraded its interlibrary loan capabilities with the addition of Relais ILL, an automated interlibrary loan system from Relais™ International, Inc. Relais has been producing automated systems to support interlibrary loan and document delivery services since 1996. Amigos Member Discount Services

offers three Relais products: Relais Express for document delivery, Relais ILL, and Relais D2D, which integrates end-user discovery experience with request management.

¿Que Pasa? recently sought out Jacob Pichnarcik, ILL Specialist at the Gee Library, to learn why the library chose the Relais ILL system.

“In the last 10 years that I have been in this ILL office, first as a student worker, then as the assistant, and now as a supervisor, none of our processing or delivery programs had ever been updated,” Pichnarcik said. “We used Ariel to send and receive from other libraries, and Prospero to deliver electronic documents to our patrons. The Prospero program has been unsupported for nearly eight years now, becoming increasingly unreliable, and Ariel is rapidly being replaced by Odyssey. Relais offers universally communicating software. That is, it can send and receive to and from Ariel and Odyssey as well as deliver documents to email via attachment or a link to an outside server. In addition, we can process received documents from Ariel and Odyssey from any workstation in our ILL office and process them while simultaneously scanning and sending from our scanners. This universal capability was the biggest reason we went with Relais.”

“Additionally,” Pichnarcik noted, “we liked the fact that Relais can communicate seamlessly with Innovative Interface’s Millennium integrated library system. This eliminates the necessity for us to add received books manually as on-the-fly records prior to checkout. Patrons also have complete access to all their interlibrary loan records via a secure log-in system. Once they log in, they can see what they have ordered, what has arrived, and also get real-time updates for the status of their orders that have not yet been received, all without ILL staff intervention.”

Pichnarcik also described a feature the library loves about Relais. “When requests for materials come in,” he said, “the Relais software reads our public access catalog (PAC) and begins processing the request. If an exact match is found, a pick slip is printed without ILL staff needing to review the request. If an exact match isn’t found, the request is sent to a queue for staff review. Likewise, when I am ordering items, the Relais software reads the PACs of potential lending libraries and displays the status – available, on loan, etc. – before I add those lenders to a string. This will cut down on unfilled requests and should speed successful acquisition of materials for our patrons.”

Since the library is still in its initial testing of the Relais ILL system, Pichnarcik says it’s too soon to offer an evaluation, but he’s encouraged. “We aren’t fully implemented yet,” he said. “We’re hoping to go fully live within the next two weeks or so. I can tell you that everything so far is working as advertised.”

Amigos will visit with Pichnarcik again in the coming months for an update on the library’s Relais ILL experience that will appear in the spring 2012 issue of *¿Que Pasa?*. For more information on the Relais products offered by Amigos Member Discount Services, contact Rita Patrick at 1-800-843-8482, ext. 2850, or patrick@amigos.org. *QP*

Viewpoint from the Chair

As Amigos seeks to find ways to utilize its expertise in areas that benefit the organization – and by extension, Amigos Members – we are looking more and more at the value of the kinds of services Amigos can provide to consortial groups, whether or not they are Amigos members.

Such efforts are in line with the current Amigos Strategic Plan. Goal Three of the Plan is “to enhance member libraries’ benefits by extending selected services to affiliated organizations”. One of the strategies for accomplishing this goal is that “Amigos will provide fiscal services to library affiliates as well as to members”.

What types of fiscal services can Amigos provide? A good example would be the organization’s role as a fiscal partner to various incorporated nonprofit groups. We’ve found, for example, that many such groups benefit from outsourcing administrative functions rather than employing staff and incurring salary and benefits expense.

Also, many informal nonprofit consortia contract with third parties for fiscal services so they can legally enter into agreements. Without the ability of a consortium to sign vendor agreements, for example, the terms of those agreements would become the responsibility of one or more individual consortium members, a risk most members might understandably be reluctant to assume.

An excellent example is Amigos’ longstanding role in TExpress, the interlibrary loan courier service for Texas libraries offered by the Texas State Library and Archives Commission (TSLAC), for which Amigos serves as the administrative partner. Among its many TExpress responsibilities, Amigos subcontracts with a courier company to provide expedited five-, three-, or two-day pickup and delivery of interlibrary loan and other materials to participating libraries. The partnership between Amigos and TSLAC is vital to the success of the TExpress service. The infrastructure that was developed to support TExpress served as the foundation for Trans-Amigos Express, from which a great many Amigos members now benefit. Here at Oklahoma State, we’ve benefitted to the tune of over \$9,000 in annual savings.

The revenue Amigos derives from providing fiscal and administrative services to consortia of different sizes helps Amigos to maintain our financial viability and allows us to continue our mission of promoting resource sharing and obtaining innovative services for members more affordably through collaboration.

As an Amigos Member I truly believe that if a rising tide floats all boats, as the old saying goes, a healthy Amigos lifts us all. *QP*

Anne Prestamo, Chair, Amigos Board of Directors



Anne Prestamo

The library staff would then take the materials to the Acquisitions Department. An Acquisitions staff member would record the number of items received for each donor in one of three categories: anonymous, donors without an inventory list, and donors with inventory lists. At the end of the month, the staff member would send letters to those donors requiring no inventory lists. For those donors who preferred to receive inventory lists at the end of the calendar year, the staff member would send these lists along with acknowledgement letters in December.

The Acquisitions staff member would set aside these donated materials for the liaison librarians to review them. The liaison librarians would decide whether to retain these materials or dispose of them.

QP: Describe your current approach and explain how it meets your needs better than your prior approach.

MJV: In discussions with the Office of Development, we learned that we needed to provide additional information. We revised our procedures accordingly.

First, we had to provide donor information. It became essential that the library staff keep a good record of who donated materials and what they donated. We requested that all library staff have the gifts-in-kind acceptance forms be made available because these forms should accompany the donated materials. If the donor preferred to remain anonymous, and/or there was no additional information when materials were dropped off during the library's off-hours, library staff would enclose the forms and mark them anonymous, alerting Acquisitions and the Office of Development staff that no additional information would be available.

Second, we had to provide an inventory list using Excel spreadsheets. The Office of Development wanted to know when the materials were donated along with a brief citation (author, title, publisher, publication date, and format, i.e. hardbound versus paperback.). As an example, if microfilm was received we needed to list the number of reels received. If multiple volumes of a title were received, we also recorded the number of items.

Third, the library would submit the donation forms, along with copies of acknowledgement letters and inventory lists, to the Office of Development on a monthly basis. This allowed the Office of Development to record all the pertinent information into their database, which generated formal thank-you notes for donors.

Finally, the Office of Development generated weekly reports and disseminated them to the appropriate department heads. A copy was also sent to the university administration.

QP: Can you close with some additional good advice for your Amigos colleagues on this topic?

MJV: Communication is critical in making the process viable and efficient. Although the inventory lists require extra data entry time on the Acquisitions end, this process allows the library to participate in UTD's ongoing efforts to raise funds to meet their needs. And it is always a good thing to make the library a visible entity.

As for "good advice", I can share our process relating to cataloging. We add a 947 field within bibliographic records for internal purposes only. And it is essential to mark the holdings record as a gift in the 008 method-of-acquisition field in order to generate an Excel inventory list of all materials acquired through the donation process.

One final piece of advice I would offer is to confer with colleagues both within and outside your library when defining revised procedures. I'd like to thank my fellow librarians who shared information and insights with me in response to my queries over various listservs. *QP*

Robert Williams Joins Amigos as Open-Source ILS Project Manager

Amigos is pleased to announce that Robert L. Williams has been named project manager for the Amigos Open-Source Integrated Library System (ILS) pilot project. Williams, who began his duties this week, will manage all phases of the pilot project, including technical development and customer support.



Robert Williams

Williams comes to Amigos from the South Texas Library System, where he served since 2007 as a technology consultant. Since 1998 he has owned Williams Consulting, a Corpus Christi, TX firm that presents workshops and seminars on computer and network technology and Internet-related topics. He holds a Bachelor of Science degree in secondary education and a Master of Information Science degree, both from the University of North Texas, Denton.

"I'm excited to work with Amigos Members to explore and implement an open-source ILS as a part of accomplishing their organizational goals," said Williams. "For the past 15 years, I have worked to help libraries implement new and alternative technologies to minimize costs. In many areas, open-source software is a major contributor to that goal."

"We're excited to have Robert on board to manage this important project," said Charles Cason, Chief Financial Officer for Amigos. "He brings the ideal combination of a library background and technical skills we seek in a project manager. We're confident Robert's expertise will help Amigos guide members seeking an open-source solution to their ILS needs." *QP*

Want to Be Featured in *¿Que Pasa?*

Do you have a creative way to engage patrons? Doing something innovative at your library? We want to help you spread the word! Contact Larry Godwin, godwin@amigos.org, for the opportunity to be featured in an issue of *¿Que Pasa?*

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Amigos at Upcoming State Conferences

Amigos is scheduled to participate in three upcoming state conferences. Amigos will exhibit at the conferences, and attendees are invited to stop by the Amigos booth, say hello and check out what's new at Amigos.

Arkansas

Amigos will be on hand at the Arkansas Library Association's 2011 Annual Conference, September 24-27 at the Peabody Hotel and Statehouse Convention Center in Little Rock. Bill Walker, Imaging Field Services Officer for Amigos Imaging & Preservation Service, will present *Questions to Ask When Selecting a Digital Library System* Monday, September 26, from 10:00 to 10:50 a.m.

Amigos will exhibit in booth #20. Exhibit hours are Sunday, September 25, 3:00 p.m. to 6:00 p.m., and Monday, September 26, 8:00 a.m. to 4:30 p.m.

Colorado

Amigos will exhibit in Booth 16 at the 2011 Colorado Association of Libraries Conference, October 13-15 at the Embassy Suites/John Q. Hammond Events Center in Loveland. Exhibit hours are October 13, 5:15 to 7:15 p.m., and Friday, October 14, 9:00 a.m. to 6:00 p.m.

Arizona

Amigos will be an exhibitor at the Arizona Library Association's 2011 Conference, November 28-30 at the Westin La Paloma in Tucson. Exhibit hours are Tuesday, November 29, 7:30 a.m. to 3:50 p.m., and Wednesday, November 30, 8:00 a.m. to 3:40 p.m. *QP*

Welcome to the Newest Amigos Members!

Central New York Library Resources Council

Syracuse, NY

Ms. Deborah Emerson, Executive Director

Nebraska Library Commission

Lincoln, NE

Mr. Rod Wagner, Director

Southwestern College - Harold and Mary Ellen Deets Library

Winfield, KS

Ms. Veronica McAsey, Library Director

August Board of Directors Meeting Highlights

At its August 5 meeting in Dallas, the Amigos Board of Directors announced the appointment of Craig Stephenson, City Manager for the City of Ponca City, OK, to serve as an independent director on the board. Stephenson replaces Joel Valdez, Tucson, AZ, who was unable to serve. He will serve a one-year term on the Board and be eligible for election next spring to complete the remaining two years of Mr. Valdez's three-year term.



Craig Stephenson

Board Chair Anne Prestamo, Oklahoma State University Libraries, reported on the orientation session held for new board members the previous day. She also announced the appointment of Budget and Finance Committee members: Treasurer Patrick Heath, Independent Director, Chair; Polly McCord, University of the Incarnate Word; and Art Lichtenstein, University of Central Arkansas. Prestamo also reported that Shirley Dickerson, Stephen F. Austin State University, will chair the Nominating Committee.

As is customary in the first meeting of a new fiscal year, Directors shared environmental information about libraries in their states. Sharing such information helps all Directors better understand issues across the region and alerts Amigos staff to activities that may influence services from Amigos.

In his Treasurer's report, Heath noted that the June 30 unaudited year-end financial report shows positive results for year-to-date operations and the Amigos investment portfolio.

Prestamo, who serves as a member of the OCLC Americas Regional Council and Global Council, reported on the recent meeting of the Global Council held during the American Library Association's annual conference in New Orleans.

Filling in for Amigos Chief Executive Officer Bonnie Juergens, who was unable to attend the meeting, Amigos Chief Financial Officer Charles Cason updated Directors on the status of the Open Source pilot project and provided other reports on the operations of the organization.

The next meeting of the Board of Directors will be on November 4. *QP*

View the Amigos Continuing Education Services Training Schedule at <http://www.amigos.org/node/218> for an up-to-date training schedule and registration information.

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