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How to keep 'em spending!

Briony Heyhoe-Pullar

Background

In recent years the Acquisitions team at the University of Huddersfield has had a very slow start to the book ordering process at the beginning of each new financial year. An email goes out to the subject teams in early August to let them know they can start to place their book orders for the current financial year; however, orders are very slow to arrive until much later into the year. This slow start to the process in August is then followed in May by a very hectic spending period, where subject teams try to spend their budgets. This results in the Acquisitions team office going from one extreme to the other. A few years ago it was not unheard of for the office to be filled with boxes of books throughout the summer waiting to be processed, and by the start of the new term there would often still be books waiting to be done from the previous year (these books would have been received on the system and then boxed up again). Clearly, this was a very inefficient process for all.

In order to resolve these issues, we began by looking at our internal processes. We have been using proposal orders through DawsonEnter (Dawson books is the University's primary book supplier and all books arrive shelf ready) to process our book orders for the last two and a half years. The subject librarians and subject assistants in the subject teams place the orders into baskets on DawsonEnter, adding their fund and item information before sending them through to the Acquisitions team for approval. The Acquisitions team then send these baskets via Dawsonenter, which instantly appear on the Dawson FTP server and are then imported in to Horizon, the Library Management System (LMS). The order information from the proposal order maps across to the relevant fields on the purchase order on Horizon, which is then EDI'd off to Dawson. This process works really well, and the feedback from the subject teams when we first started using proposal orders was that it was a quick and easy-to-use process and that they really liked it.

So if the ordering process is so quick and easy, why is it so difficult to get subject teams to spend?

Once term starts the librarians are heavily involved in student inductions, information literacy sessions and one-to-one appointments with students, with book orders falling to the bottom of the priority list. Because of these pressures on their time, we needed to devise a simple way in which they could monitor their budgets, know exactly what they'd spent at a glance and have some idea of what budget they still had left to spend.

What we did

We already provided the subject teams with monthly spend figures. However, these were simply Horizon reports to show the amounts on order, spent and available for each fund code within each school. We felt that providing tables of figures was not the best way to draw the teams' attention to the spend, so we knew we needed to create a more engaging way of encouraging them.

What we did was very simple, which makes you wonder why we didn't think of it sooner! At the beginning of the year we set out a forecasted target spend per month for the coming year, up until May (we plan to have all the budget spent by May which gives us two months to receive and process everything before the financial year end), going up by 8% each month until December and then moving to 12% for the rest of the year, with the intention of encouraging spend as early in the year as possible. Then each month we ran a budget report on Horizon to show the actual committed spend (on order amount + spent amount) and we compared this against the target spend, and this was sent out to the subject librarians. This information is also displayed as a graph so the subject librarians can see at a glance how close they are to their target spend.

Spend on reading lists

The University of Huddersfield has developed an in-house reading list system known as MyReading. One of the many benefits of having this system in place is that we now know how many book orders have been generated as a result of academic staff adding items to their reading lists. The subject teams already put "RLP" (Reading List Project) and the module code in the order note for a book that is on a reading list, in order for the Acquisitions team to add the item to MyReading - so we decided to use this code to run a report to identify the spend on reading list items. We include these reading list spend figures in the reports that we send to the teams. Table 1 and Figures 1 & 2 show an example of how this information is displayed for one of the schools.

Budget	Committed	
£70510.00	£49241.70	
	% spent	Target spend
Aug	0%	8%
Sep	0%	16%
Oct	37%	24%
Nov	43%	32%
Dec	48%	40%
Jan	55%	52%
Feb	70%	64%
Mar		76%
Apr		88%
May		100%

Table 1: Example of budget spend versus targets for a School

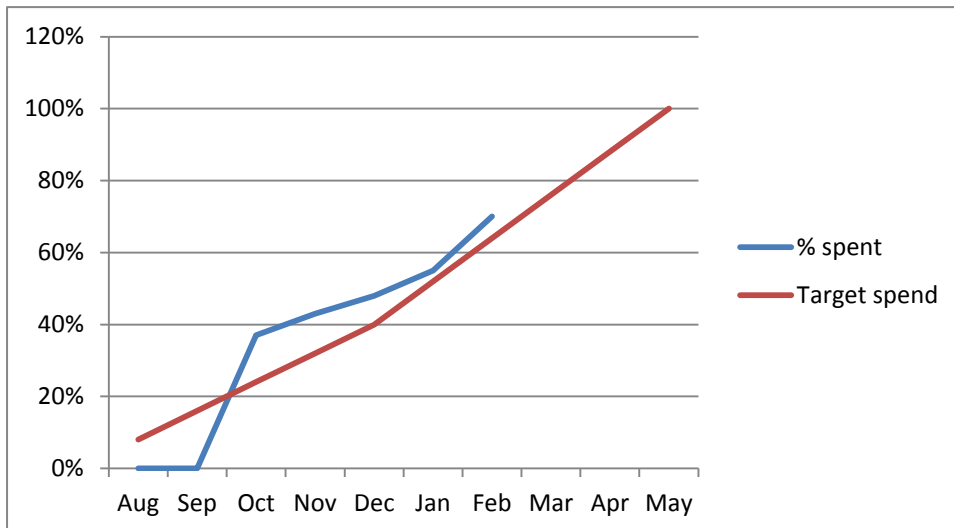


Figure 1: Example of budget spend versus targets for a School

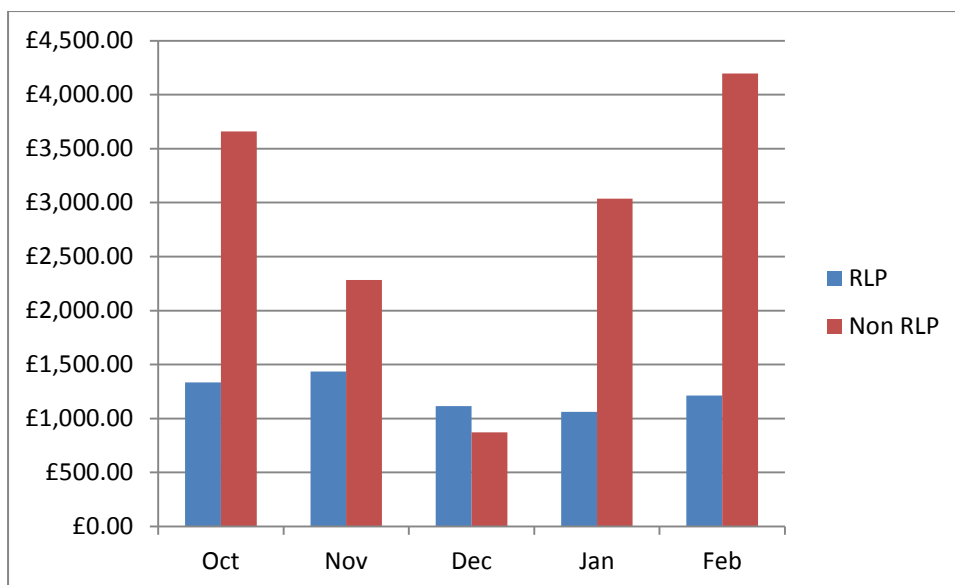


Figure 2: Example Reading list spend against non-reading list spend

Although these figures are not for the full year, Figure 1 shows that, although this team was a little late starting, the actual spend was slightly above the target spend for most of the year. Interestingly, the amount spent on non-reading list items was considerably higher than that spent on reading list items (Figure 2). This was not the case for all schools, but in general the subject teams were surprised, as they expected their RLP spend to be a greater proportion of the overall spend.

But did it work?

Yes! In fact it has been a resounding success and really does encourage the teams to keep to target. Because the whole report is sent to all subject teams (with a different tab for each school) the librarians can see each others' spend figures, which seems to add a competitive element and encourages even further spending. The Acquisitions team now receive a steady flow of books throughout the year so that there is no book backlog at the year end, and all the invoices can be processed well before the deadline. In fact the year this was implemented was the most stress-free financial year end we have ever had. The feedback from the subject teams has also been really positive and they all prefer receiving their budget spend figures in this format, and the best bit...they actually look at them. Result!

About the Author:

Briony has worked at the University of Huddersfield in various posts and has been involved in managing electronic databases and journals. In October 2009, she was appointed to the post of Library Purchasing Manager, managing library acquisitions and purchasing.