

Approval Plans

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INTRODUCTION

An approval plan is an acquisitions method under which a library receives regular shipments of new titles selected by a dealer, based on a profile of library collection interests, with the right to return what it decides not to buy. Titles that fit the profile less perfectly are announced by the dealer with paper or electronic slips or forms, which the library may use to place orders. Although the term normally refers to arrangements between libraries and book vendors specializing in libraries, some publishers and bookstores also offer approval plans, and some non-book materials are offered on approval. Although approval plans are most common in academic libraries, where they are the predominant way larger North American college and university libraries buy current books, approval plans can also be found in other types of libraries and in libraries outside North America.

HISTORY OF APPROVAL PLANS

The forerunners of the modern approval plan came after World War II, when mass-buying programs such as the Farmington Plan were organized to enable North American academic libraries to acquire books from areas of the world where war had disrupted the book trade or where buying books was otherwise difficult. Various types of domestic gathering plans or blanket order plans, as they were known, also appeared in the postwar years, when support from the federal government increased book budgets to the point where library staffs strained to spend their money through title-by-title firm orders.

In the early 1960s, Richard Abel, the manager of Portland, Oregon's Reed College Book Store, which had grown an extensive business with academic libraries, began a firm dedicated to this market. His insight that vendor advance buying in anticipation of library orders could preempt the orders themselves, if books were shipped to libraries automatically, was the core of the approval plan concept.

Within a few years, approval plans were widespread among North American academic libraries. Abel's innovations, which remain components of approval programs, fostered this period of growth. Some of these were auto-

mation of the company's processes, which made it possible for Abel to operate on a large scale; creation of an elaborate subject thesaurus to describe library interests; printing of paper bibliographic forms to accompany books, which aided internal library processes; and development of a professional staff to market and service approval plans.

The scale of Abel's operation outpaced his finances, however, and in 1974 the company failed. To alarmed librarians and publishers, this put the future of the approval plan in doubt. But another firm bought the remains of the Richard Abel Company; by then several competitors offered their own programs, and many libraries had come to depend on approval plans. The idea not only survived the Abel demise but approval plans continued to grow.

Early Debate Over Approval Plans

Acceptance did not occur without dissent, because many librarians vigorously opposed approval plans. The most important forum for debate over approval plans was a series of four conferences held from 1968 to 1979, organized by Western Michigan University's Peter Spyers-Duran.^[1-4] Some librarians argued against handing over to commercial interests the professional activity of book selection, fearing that lapses of undependable or unstable vendors and omissions of vendors focused on money-making would leave damaging gaps in library collections. Vendor concentration on mainstream, profitable books would produce library collections that were too much alike, without the collective richness resulting from local selection in support of local needs.

As vendors knew, librarians far more often than not would keep a book shipped on approval, putting many marginal titles into library collections. Conversely, it was difficult to predict whether a needed title would be shipped at all. A significant monitoring effort would be necessary to prevent gaps, to minimize unwanted titles, to eliminate duplication, and to stay within budget. The expense of this work, and of the costly handling of returns, would erase any savings a library might gain with an approval plan.

None of these objections ever disappeared, but the arguments in favor of approval plans have proven stronger



yet. Efficiencies gained from approval plans have often allowed libraries to reallocate staff to other duties, even to operate with less staff. Discounts, passed on from vendors able to buy from publishers in volume, have helped to stretch budgets. The ability to acquire new books soon after publication, while sought by patrons and still safely in print, and to make selection decisions based on the book itself, rather than on reviews or publisher advertisements, have long been reasons to establish an approval plan. Librarians administering budgets have appreciated evenness in spending across the year, and those overseeing collections have liked the subject balance approval plans ensure, even at libraries without strong subject expertise on staff.

Stability and Growth of Approval Plans

Although Spyers-Duran debated the critics of approval plans, evidence shows that the argument already had been won in the venue that truly mattered, the library operation itself. A survey published in 1977, 3 years after the Abel Company's demise, found that 79% of respondents had approval plans.^[5] In 1979, Oryx Press saw enough demand to publish a handbook, *Practical Approval Plan Management*.^[6] A survey of Association of Research Library (ARL) members published in 1982 documented that 85% of these large libraries maintained approval plans, about the same percentage recorded by an earlier survey of ARLs in 1969.^[7] ARL surveys published in 1988 and 1997 remarked on the stability of the approval plan concept through good and bad financial times and found that more than 90% of ARL libraries used them.^[8,9]

In 1999, an independent survey of nearly 300 libraries found high satisfaction with approval plans.^[10] Because many of these libraries reported approval plan expenditures under \$100,000, the survey documented what had long been evident in the literature, that use of approval plans had spread beyond research libraries. In fact, approval plans have become nearly as common among medium-sized as among large academic libraries in North America, and in specialized law, health sciences, and art libraries.

Approval plans are uncommon among small academic libraries, where orientation toward curriculum and size of budgets make them problematic. Profiles for notification slips or forms, however, are not unusual in community colleges and other small academic libraries nor in special library settings such as museums, corporations, and government agencies. The largest public libraries often use approval plans, but other public libraries rarely do.

Outside North America, acceptance of approval plans has been uneven. Book vendors in many countries have developed approval plan services for North American customers, but libraries in most other parts of the world make little use of them. Again, however, profiles for slips

or forms can be found in most areas of the world. Exceptions are Hong Kong, Australia, and New Zealand, where many academic libraries have approval arrangements for North American and British books. Returns over such distance are expensive for both library and vendor, so these profiles often are weighted toward slips or forms, and shelf-ready arrangements, without returns, are common.

FEATURES OF APPROVAL PLANS

The spread of approval plans owed in part to new services offered by vendors that responded to library requirements and attempted to wrest customers from competitors. One effect was that the number of vendors offering large-scale approval plans shrank during the 1990s, because the financial and other resources needed to offer approval plans led to a consolidation in the industry, one never characterized by high margins, which Richard Abel had begun a generation before. Today's approval plan combines features introduced by Abel with others enabled by more recent computer technologies.

Profiles

Every approval plan is based on a "profile," a description of collection interests that guides the vendor in selecting titles for a library. Vendors have their own systems for documenting profiles, but all work with customers to create and then revise over time a profile that will be at the heart of an approval plan. Some libraries establish one all-encompassing profile with a vendor. Other libraries establish multiple profiles, often referred to as "subprofiles." These may correspond to subject areas, selectors, or funds in the materials budget.

Profiles have several basic components. First, depending on the vendor's system, subject parameters are recorded by using standard library classification systems, vendor-developed subject schemes, free text, or a combination of these approaches. Second, vendors designate categories of nonsubject descriptors for dozens of bibliographic categories such as textbook, reprint, country of origin, language, binding, and price. Third, publisher parameters might be left open—this approach is sometimes referred to as a "subject-based" profile, on the assumption that only subject parameters limit selections. Or publishers covered or excluded might be documented with a list—an approach often referred to as a "publisher-based" profile. In practice, most profiles are a combination of the two approaches. Finally, a list of authors important to a library might be included in an approval plan profile, and



some vendors make it possible for libraries to incorporate book awards or significant review notices into a profile.

Approval plan profiles guard against standing order duplication in two ways. One is to restrict broad categories of continuation titles, such as series, sets, or annuals. Another is to establish approval plan instructions for individual continuation titles. Typically, libraries use the latter approach to restrict titles in this way, but some vendors allow libraries in effect to establish certain standing orders within an approval plan.

In preparing an approval plan profile, each subject, nonsubject, publisher, or other decision can be set to allow automatic shipment of books; to allow notification only, in categories marginal for the library; or to exclude coverage entirely. Notification forms or slips enable libraries to control a wider bibliographic universe than possible through automatic book shipments alone and are a convenient means for placing orders. Some library profiles produce only forms or slips and no automatic book shipments. Some vendors provide notification on titles to be shipped as approval books, enabling libraries to review and cancel shipment of unwanted titles.

Vendors usually offer substantial approval plan customer service support, composed of in-house staff and field representatives trained to work with libraries to write and revise profiles, as well as to solve problems with orders and shipments. Their goals are to reduce returns, to keep a profile current with library needs and in line with budget, and to introduce new features or services offered by the vendor.

Technical Services

During the 1980s and 1990s, many libraries began to receive technical services from their approval plan vendor. The first stage of this was receipt of electronic files of brief bibliographic records or full cataloging records for approval plan books, which libraries could load in batch. By the mid-1990s, libraries could batch-load cataloging records directly from OCLC through PromptCat, a service coordinated with book vendors. When vendors began to offer physical processing as well, approval plan books could be delivered fully shelf-ready. These no longer were truly "approval" plans, because vendors could not accept returns of processed books. But many libraries with low return rates found that a "purchase plan," as shelf-ready plans sometimes are known, was an economical arrangement.

Vendor Database Services

In the mid-1980s, vendors began to offer customers microfiche versions of their title database for use in bibliographic searching. In the late 1980s, libraries gained

live telnet-based access to vendor data, and by the mid-1990s, these services had migrated to the World Wide Web. Vendor database services are still used for bibliographic searching but now encompass a range of other functions as well, often allowing approval plan librarians to view and query their profile, to select and order titles, to prevent shipment of titles, to see a record of library title history, to run expenditure and management reports, and to analyze approval plan returns.

APPROVAL PLAN OPERATIONS

Library Operations

Library approval plan operations are well documented. The first step in establishing an approval plan is vendor selection, often a highly formal process of gathering, evaluating, and comparing information. The library then writes its profile with the chosen vendor, a step that must be coordinated with the fiscal, operational, and systems structures to support an approval plan. During the 1990s, libraries, book vendors, bibliographic utilities, and vendors of integrated library systems developed many electronic interfaces with one another, to automate for approval plan libraries much of the time-consuming work of searching, record loading, invoice processing, and financial accounting.

Most approval plan budgets are structured in one of two ways. Some libraries require selectors to charge each book accepted for purchase to subject funds they oversee. Other libraries account for their approval plan with one line in the materials budget and do not charge subject funds. The first approach allows finer tracking of expenditure patterns; the second is easier to administer. Financial transactions between library and approval plan vendor will likewise take place in one of two ways. Libraries either pay each invoice separately or pay the vendor in advance. With the second approach, a yearly deposit usually covers expenditures. The vendor in return pays interest on the deposit balance or raises the library discount.

When libraries receive books on approval automatically, they must process regular shipments of books that have not been ordered. Most approval plan shipments are weekly, and libraries often display books for a week or two for selectors to review. Staff must have procedures for returning rejected books to the vendor and for moving books into the collection when accepted. To avoid buying duplicate books, libraries normally search the local system to check that the same books accepted have not already been acquired or ordered. Procedures must also exist for placing cataloging records in the local system, and if records are obtained in batch, for deleting records for rejected titles.



Libraries must have procedures for distributing to selectors the notification slips or forms that are an important part of most approval plans, or for regular review of the online equivalents. Titles selected in this way are in some libraries mainstreamed with firm orders, and in others segregated as orders associated with the approval plan.

All libraries that use approval plans need a structure for decision making on profile changes and protocols for contacting the vendor. Most libraries informally evaluate approval plan effectiveness, and many perform periodic formal evaluation.

Vendor Operations

Vendor approval plan operations are less well documented. When a library weighs selection of vendor, vendor marketing and sales staff attempt to influence the decision. Specialist staff from the successful vendor share the work of writing and revising profiles with librarians. Another shared job, which may begin at this point, is the initial and ongoing training in the vendor's database service, as well as the integration of vendor technical services into the library's workflow.

Internal staff will activate the new profile and any subsequent profile changes in the vendor's system, sometimes a data entry job, sometimes a matter of interpretation and translation. An automated or semiautomated procedure compares library profiles to book descriptions created by highly trained staff who categorize books with the same terminology used in library profiles. The comparison outcome determines which books will be shipped automatically, which will be announced with forms or slips, and which will be excluded for a library.

Approval vendors also have systems for monitoring publishers and buying new books; for receiving and housing books; for recording and manipulating bibliographic, cataloging, and price data; for processing, boxing, shipping, and billing books; for preventing duplicate shipments within a library's approval plan, and between an approval plan and firm order or standing order shipments; for printing and sorting paper forms and invoices; for taking orders and payments; for accepting library returns; for returning books to publishers; and for communicating with customers. Each of these systems for handling physical books and their bibliographic and financial representations must be conducted in tandem with parallel library systems of many varieties.

THE FUTURE OF APPROVAL PLANS

Approval plans have proven efficient for libraries and good business for vendors that specialize in them. Use of approval plans is likely to grow in academic libraries

outside North America, particularly in Europe and Asia, where English language books are acquired in significant number. Smaller academic libraries in North America are also likely to adopt versions of approval plans. Approval vendors, to gain business in these markets, are building mechanisms to deliver relevant bibliographic information to teaching faculty, who often hold book selection authority, and interfaces to online systems that allow these new users to recommend title purchases to librarians.

As the customer base for approval plans becomes more international, the universe of titles made available by the largest vendors, who are based in North America and the United Kingdom, will become more international as well. Approval plan mechanisms are also being adapted to handle electronic books and audiovisual materials, formats desired by the traditional and newer approval plan customer base alike. Metadata describing titles in vendor on-line services will continue to improve in quality and increase in quantity. Tables of contents, book jackets, chapters, abstracts, and reviews are becoming sufficient to rival examination of the physical book itself. It is an irony that richer vendor databases will probably make title-by-title selection, based on bibliographic notification generated by a profile more enticing for some libraries.

In the future, selections may also be informed by consideration of whether other libraries have acquired a title. Customer transaction data, a staple of internal vendor systems, will in a vendor's online system be put to use by the customers themselves. Libraries formally cooperating will use this information to close gaps, by collectively buying fewer copies of some titles and using that money to purchase other titles not bought by the group. Library consortia, at a higher level of cooperation, will coordinate not just orders but approval plan profiles, so that coverage for particular subjects or other bibliographic categories are assigned different emphases within the group. Librarians will be able to retrieve price and output data about the bibliographic universe and about the selection, ordering, and returns of their own group, their own library, even about individual users within a library. Vendor systems will offer at least some authority for libraries to adjust their own profiles and so put these data to use. The immediacy of data and the continued move toward efficiency in libraries will diminish the importance of the "approval" component of approval plans (i.e., the assumption that returns will routinely occur).

As approval plans became more central to libraries, and the arrangements more complex, the systems vendors needed to support them also became more central and more complex. These systems, first developed as basic searching and ordering tools, have evolved to include features such as profile documentation and querying, selecting and ordering, and transaction history and report-



ing. They directly support approval plans but have come to resemble other systems with which librarians are familiar, retail websites, integrated library systems, and bibliographic utilities. Future improvements to approval plan programs will depend largely on further development of vendors' online systems.

Approval plans have become far more than another way to buy or sell books. For many libraries, approval plans are the centerpiece for the collection of monographs. For some academic booksellers, approval plans account for most business and are the centerpiece of operations, sales, marketing, and systems development. Approval plans, often the most important point of contact between a library and a vendor, have become essential to both.

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