Appendix E

Collaborative Purchases Discussion

A central pool of funds may work if we can use MaineStreet and create a line and invoices within MaineStreet for a Fogler Database Fund or some other name. (If we are looking at a pool that does not have the invoices tied to it this will not work)

It may be difficult for all campuses to pay up front in a multi-year contract. We can see if the vendors can supply multiple invoices for a multi-year contract. Then it may be possible to send out the invoices to all in July for all products. There are some now that are not fiscal year contracts, so we would need to make an exception for those. These types of contracts do require that one library be able to pay for the full contract in the first year.   (I was told that the vendors will not supply multiple invoices because it creates a problem at their end with internal accounting)

One suggested procedure:

Request account combinations to be used for billing at beginning of the year.

One week prior to putting a shared billing invoice through the purchasing system, email campus contacts and let them know that billing for the product will be put through on a particular day. This assumes that the purchase of the product has been agreed upon by the Directors.

Each unit will be charged their share, and will need to approve it in Maine Street Marketplace. The total amount of the invoice will show in the approval line, but it should be possible to drill down and see your individual expense.

Direct billing at the time the invoice is processed eliminates the need to do a JV or an adjustment after the fact. The Director of Orono's purchasing department has encouraged this approach.

When making a purchasing decision that spans multiple years, it is preferred that the payment is something that each unit can pay in the initial year. In the case of Summon, Ebook, and Refworks, payments from the campuses did not match the fiscal period of the invoice. At Orono, we found an expense that matched the original billing that could be shifted to the other campuses for their share during years 2 and 3. Ideally everyone would pay their share upfront. In some instances we have been able to get stable pricing for a five year period with an invoice provided each year (e.g., Serials Solutions 360 product). This has worked well.

As we acquire products and databases Maine InfoNet needs to be in the loop from the beginning. This will help with issues about timing, server needs, and other resources that may be required to make a product or resource available. We also need just one communicator with the vendor, that individual will communicate with all involved libraries and MIN. We will be aware of the installation time needed and take the summer months into consideration since there may be fewer hours to put into a product installation when staffs are on vacation. If we make sure that all purchases are coordinated and communicated we should be able to make installations work better for all involved.

 If any of us are seriously considering a new product we will alert others using the URSUS listserv, then if there is more general interest it may be explored as a collaborative purchase.

We need to provide direction for the Database Committee for ebooks, this is a difficult topic and we do not have a good handle on how this may develop.

We need to make certain that we are following the procedures set by the UMS Office and our campus business offices when we are working on collaborative purchases. It was noted that each campus may have differing policies and procedures.

We will keep collaborative purchases as a standing agenda item with these subheadings -report on what we are doing, is Maine InfoNet in the loop, what are we exploring as possible purchases, and are we exploring anything new. And we will keep the communications open by using the listserv.