

## **Procedures and Guidelines Regarding Departmental or Individual Purchasing of Rare, Out of Print or Specialty Material Intended for Library Reimbursement – Includes Section on Preview Items:**

This is for those situations, such as exhibit openings or international trips, where you might want to purchase books or DVDs for the library and these items are not available in OhioLINK or otherwise readily available via any number of online vendors or national/international publishing and distribution companies.

As always, please see your library liaison or the acquisition manager with any questions. The sooner the library liaison is involved, the smoother the transactions will go and the faster the material will be available in our collection.

Please use this purchase method only when you are travelling and know that you might come across rare, limited run publications. (This type of purchasing shouldn't be done at Barnes & Noble or other standard retail shops, both "brick and mortar" or online. Our acquisitions manager can often find those items for a cheaper price.) If it is an item you need rushed, just indicate that on the online form when you submit it. With these guidelines in mind, please consider any purchases that would enhance our collection that have a limited publication run and/or are from a small publishing venture.

If you will be travelling internationally, or attending a premier or gallery opening where items of a limited and rare nature will be available, and have read through the complete guide, there is a checklist available at the end of this document.

Please scroll to the bottom if you're interested in policies regarding preview copies:

- 1) Whenever possible, make sure the title you want is not already available in our catalog – we do not add second copies. If you would like, please send a list of the titles you are considering to either your librarian liaison or Elizabeth Zeitz, Acquisition Manager ([EZeitz@otterbein.edu](mailto:EZeitz@otterbein.edu)) and they will be glad to check the collection for you.
- 2) Reimbursement or library purchasing is dependent upon the availability of library funds. Please check with Elizabeth Zeitz, our acquisitions manager, to verify the availability of funds. Her number is 614-823-1938, email [EZeitz@otterbein.edu](mailto:EZeitz@otterbein.edu)
- 2) Any purchases you make must be less than \$450.00.
- 3) Otterbein College is, as an institution of higher education, a tax exempt entity. To obtain a tax exempt form, contact Elizabeth Zeitz. If tax is charged to a purchase, the College will be unable to reimburse you for that tax amount.
- 4) Keep your receipt. Further, the receipt must clearly indicate the title(s) and amount that you spent for each item. Submissions for reimbursement without a receipt will be treated as donations and you will not be reimbursed.

- 5) International purchases made on a credit card will need to have currency exchange calculations performed. A reliable currency exchange engine online is: <http://www.xe.com/ucc/>. If a credit card statement is not provided along with the receipts, any bank transaction fees will not be included in the reimbursement. Please make it known if you will be submitting a credit card statement for reimbursement of these fees as it will delay your reimbursement. Currency exchange calculations, if not already included on the submitted receipts, will be performed on the date that the acquisition manager submits the payment voucher to the Business Office.
- 6) You will need to submit the items and the receipt at the same time to begin the reimbursement process, preferably as soon as possible upon your return.

***NOTES FOR PERSONAL REIMBURSEMENT:***

- ❖ Reimbursement can be slow - expect two to four weeks, possibly a little more. Typically the business office will direct deposit the reimbursement.
- ❖ If all receipts are not provided, copies of relevant credit card statements may be requested to provide support for the Business Office. This will delay the reimbursement.

***NOTES REGARDING PREVIEW COPIES:***

- The library typically does not encourage the acceptance of publisher preview copies, and generally does not pay for such items to be added to the collection.
- In the rare cases that the library does pay for such items to be added to the collection, we ask that we are given adequate time to contact the publisher in order to arrange for both any discounts and for any licensing issues that may arise. There can be no late or overdue fines attached to the cost of the preview item, and the preview item must cost under \$450.
- Any item over \$500 requires advance purchase order approval, necessitating that the acquisition manager be involved in any conversations regarding the intent to obtain such an item. The acquisition manager will be the main agent involved in the purchase, negotiation of price, agreement of licensure, and the obtaining of all requisite Otterbein signatures for approval before the item can be ordered. The acquisition manager is eager to make the entire process as seamless and painless as possible so that the item can be added to the collection as quickly as possible.
- **Please contact your liaison librarian as soon as possible regarding any items that you may be interested in having added to the Library collection so that a solution satisfactory to all parties may be reached.** In all situations, your liaison librarian is ready to answer any questions you may have and to ensure the best experience possible as you work to improve your library collection, even more so in the often tricky situations that can arise from preview copies.

**QUICK CHECKLIST:  
INTERNATIONAL TRAVEL & GALLERY/EXHIBIT PREMIERS**

**Before the trip:**

- Did you remember to inform your liaison or the acquisitions manager of your intent to possibly purchase items?
- Was it possible to perform any duplication checks as compared to the Courtright Memorial Library collection?
- Did you check with Elizabeth Zeitz ([EZeitz@otterbein.edu](mailto:EZeitz@otterbein.edu) or x1938) for fund availability no more than 2 days before leaving
- Did you obtain a tax exempt form from Elizabeth Zeitz for national gallery/exhibit premiers?
- Purchases cannot exceed \$450 (US)

**Upon Return to Otterbein:**

- Did you keep your receipts, each receipt with its corresponding item(s) clearly marked and indicated with price and title?
- Did you perform any necessary international currency exchanges?
- Did you remember to give your receipt and items to the library as soon as possible upon your return?
- Did you indicate whether or not you would be submitting a credit card statement at a later time for reimbursement of transaction fees?
- Did you remember to include a note with your name, email, and Department with your purchases?

**Now, just wait a few weeks after all receipts and statements have been submitted to the acquisition manager and you'll get reimbursed for the cost of the items, less any tax paid. Your items will be added to the library collection with the thanks of all our staff and patrons!**