

Finance

Information Access Policy

Clemson University Libraries

Finance Librarian: [K. D. Connor](#)

Written by Jan Comfort, Finance Librarian, Fall 1998
Updated by Kevin Connor, Finance Librarian, Spring 2003

- I. **Purpose:** To support research and teaching needs leading to the Bachelor of Science in Financial Management degree.
- A. **Curriculum:** The Department of Finance is located in the School of Business and Leadership, College of Business and Public Affairs. The Department offers the **Bachelor of Science in Financial Management** degree. Students are expected to meet the "[International Requirement of the Business Common Core Undergraduate Curriculum](#)" during the sophomore year. Financial Management majors select an emphasis area by the end of the junior year. The areas of emphasis are Corporate Finance, Financial Planning, Financial Services and Real Estate. No graduate degree is currently offered. Students who complete a specific set of courses are eligible to sit for the Certified Financial Planner (CFP) examination.

Financial Management Degree Program (from the [Undergraduate Announcements](#))
see http://www.registrar.clemson.edu/publicat/catalog/sections/colleges/cbpa/fin_man.htm

Undergraduate Courses (from the [Undergraduate Announcements](#))
see <http://www.registrar.clemson.edu/publicat/catalog/sections/coi/fin.htm>

B. **Primary Users:**

*Undergraduate majors:	442 students enrolled Fall 2001
Finance faculty :	9 (as of 6/30/02)

* figures from [Clemson University Fact Book 2001](#), published by Clemson University Office of Institutional Research.

C. **Secondary Users:**

Undergraduate students majoring in other subjects. In the College of Business and Public Affairs, students majoring in Accounting, Economics, Industrial Management, Management, or Marketing are required to take at least one Finance course as part of their curriculum.

Selected courses are offered as 400/600 level courses to provide electives for graduate students in other areas.

Community members

II. **Scope of In-House Collection:**

Inclusion of material is based primarily on relevance to academic programs. To a large degree, information needs for Finance are supported by current material in the Reference collection. Long runs of materials with historical company and financial data, such as *Value Line*, bond and stock records, and *Moody's Manuals*, will be maintained. The collection overlaps mainly with economics, accounting and legal studies, management (principles and strategy) and mathematics (statistics and analysis.) Selected non-academic current issues at a popular reading level (i.e. personal investing) for use in all areas of study are also included.

A. **Formats Guidelines**

1. **Print Resources**

Collecting efforts will focus primarily on purchasing print sources, such as books, journals, and serials (including loose-leaf materials.) Books accompanied by computer discs will also be selected. Multiple copies of any title will be purchased only under special circumstances.

Journals: Every effort will be made to preserve the current journal collection and to add new titles, including journals supporting new programs, as funds allow. However, the electronic availability of journal titles, for example via *General BusinessFile*, will be considered before subscribing to the print format of any new journal title.

2. **Electronic Resources**

Electronic information sources are generally very expensive. Therefore, these sources will be evaluated for their wide appeal and will generally be purchased from REF funds, special funding, or in collaboration with others.

3. **Audio-Visual**

Audio- and Video-tapes will be purchased on a highly selective basis.

B. **Language Guidelines**

Only English language materials will be purchased.

C. **Geographical Guidelines**

Generally, emphasis will be given to acquiring sources focusing on a broad range of financial information related to the United States. Topics in international finance will be purchased on a more selective basis.

D. **Chronological Guidelines**

Selecting will focus on current, up-to-date information. Important works on the history of finance and financial systems will also be selected.

E. **Publication Date Guidelines**

Generally the selector will purchase materials published within the last two years. Materials requested by a faculty member or highly recommended in a review source will also be considered, regardless of publication date. Highly used or standard older titles that are lost or discarded due to condition will be considered for replacement.

F. **Types of Materials Included in the Finance Collection**

Almanacs and Yearbooks: Are generally located in the Reference collection, although older volumes may be moved to the circulating collection as new editions are received. The emphasis will be on providing the most current information. No effort is made to select beyond the scope of that collection.

Annual Reports: The annual report file contains paper copies of annual reports, and in some cases proxy statements, 10Ks, etc., for the latest 3 years. Companies have been selected because of their size, popularity, or local interest. New reports are requested as needed. Donated reports are added based on the same criteria as the current reports. A large, historic collection of reports is available on microfiche (see *SEC File*), as well as on *LEXIS/NEXIS* (see [Electronic Databases](#).)

Bibliographies: Narrow subject scope bibliographies will be selected as appropriate to the focus of the collection.

Biographical Sources: Are selected for both the Reference and circulating collections, as appropriate.

Career guidance and job-seeking guides: Will be selected for *finance careers only*. Books on general career information should be purchased from Ref or Misc funds.

Electronic Databases: Will be purchased through REF funds, special funds or in collaborative arrangements. The electronic databases currently in Reference or on the Libraries homepage of special interest to finance students:

Mergent/Moodys U.S. Company Data: company financial information for an average of 5 years.

General BusinessFile ASAP (on Libraries homepage): citations to articles on business topics, companies, and industries; some entries containing an abstract or full text article with graphics. Financial analysts' reports (Investext) and company profiles on many public and private companies are also available.

Factiva (on Libraries homepage): information pertaining to finance can be found in this database using the "search" feature. Included are articles from magazines and newspapers, especially Dow Jones publications such as the Wall Street Journal.

LEXIS/NEXIS (on Libraries homepage): information pertaining to finance can be found in the News, Business, and Legal Research sections. Included are articles from magazines and newspapers, SEC filings, tax and accounting documents, and state and Federal laws and cases.

Web of Science: ISI Social Sciences Citation Index (on Libraries homepage) : citations, with abstracts, to journal articles from 1990 to current. As in the print source, citations of articles can also be traced.

ABI/Inform on ProQuest (1986-1997): citations and abstracts covering a wide range of business topics including finance. Some articles are available full-text.
(Previously underwritten by the Dean of the College of Business and Public Affairs, the subscription has been cancelled.)

Clemson University Information: Any material relating to the College of Business and Public Affairs will be retained.

Dictionaries: Are mainly purchased for the Reference collection, although some volumes will be made available in the circulating collection. Emphasis will be on adding current volumes or those with unique coverage.

Directories: Are purchased for the Reference Collection. No effort is made to select beyond the scope of that collection.

Guidebooks and workbooks: Books that are targeted for practitioners or other business people will be purchased selectively as needed. Books consisting of checklists, or books which are primarily worksheets to fill in, are not appropriate for our audience and will therefore not be purchased.

Handbooks and Manuals: Current, authoritative handbooks and manuals will be requested for the Reference collection or purchased for circulation, depending on format and expected use.

Print Periodical Indexes: The *Wall Street Journal Index*, *Business Periodicals Index* and *Index of Economic Articles in Journals and Collective Volumes* are available and should be retained.

Textbooks: Textbooks which are used in classes taught at Clemson will not be purchased. Other textbooks may be purchased, if they are deemed appropriate in supporting the curriculum.

III. **Access to Information Not On-Site**

A. **Interlibrary Loan**

The primary access point for books and journals not owned by the Libraries or electronically accessible will be Interlibrary Loan. This service is free to Clemson University students, faculty, and staff. This service is not available to the general public.

B. **Commercial Document Suppliers**

Document Delivery via commercial document suppliers (such as *Ingenta*) will be offered free of charge to Clemson University students, faculty, or staff, if the needed information is not available from interlibrary loan sources by the deadline needed. This service is not available to the general public.

C. **Full-text Databases**

Full-text databases will be made available through the [Clemson University Libraries homepage](#). Off-campus access will be provided if possible.

D. Electronic Journals

The library subscribes to both electronic collections of full-text journals as well as individual full-text journals. See <http://www.lib.clemson.edu/ej/index.htm>

E. Internet Sites

Additional finance-related resources on the Internet will be identified and links made available on the Libraries' [Quick Reference](#) or [WWW Sites related to Investment and Finance](#) subject pages.

IV. Selection Tools

A. Review Sources

<i>Choice</i>	Z1035. A1 C5
<i>Library Journal</i>	Z671. L698
<i>The Business Reader Review</i>	e-mail listserv
<i>HBS (Harvard Bus. School) Working Knowledge</i>	http://www.hbsworkingknowledge.hbs.edu/

B. Approval Slips

The library receives notification slips for newly published titles meeting our selection criteria from Yankee Book Peddler (YBP). The slips are made available to the library representative from the Department of Finance for input. Any faculty member may also review slips. Slips for books that were not selected are kept for one year.

C. Faculty and Student Requests

D. Publishers' Print Catalogs

E. Book Dealers and Publishers' Web Sites

F. Award Lists

Including, but not limited to, *Library Journal* "Best Business Books of [yr.]" and "Best Books of [yr.]"; *Choice* "Outstanding Academic Titles," and the *Business Week* annual "Business Best Sellers."

V. Deselection (Weeding) guidelines

A. Journals

A current weeding project is focusing on journals, especially those no longer received. Journals are being evaluated to determine if they should be kept in Cooper Library, stored remotely, or weeded (discarded). Evaluation criteria include whether the subject matter is relevant currently or for historical research; number of volumes in collection; availability electronically or in the microform collection; and for some titles, holdings in other libraries.

B. Books

An initial weeding of the collection of books relating to finance is centered on removing duplicate copies of books, especially those which have not circulated. Older titles may also be weeded if they have not circulated, the information is no longer of use due to age or subject matter, or the condition of the book warrants it. A copy of a book may be kept for historical research, even if it has never circulated.

VI. Evaluation, Assessment, and Planning Tools

A. In-house Reports

SAS reports based on age and/or usage, acquisitions by fund, numbers of titles by call number, or other reports as requested

Collection Development Database reports by call number to determine duplicates, usage, size of collection, etc.

Acquisition database of titles acquired each year (FileMakerPro)

B. Bibliographies

New Books at Baker Library <http://www.library.hbs.edu/bakerbooks/>
Books for College Libraries Ref Z1039.C65 B67 1988 (holdings added 1994)

Harvard Business School Core Collection Ref Z7164.C81 H265 1994

C. **Benchmark Institutions (Amigos Reports)**

Comparison of CU Libraries' collection to "benchmark" institutions.

Clemson Benchmark Institutions	
Auburn	Georgia Tech
Iowa State	Michigan State
North Carolina State	Purdue
Texas A&M	University of California at Davis
Virginia Tech	

D. **Social Science Citation Index (SSCI) Journal Citation Reports**

E. **Subscription Assessment**

One tool in the assessment of the journal collection will be the titles included in the major indexes and abstracts. Evaluation tools and core lists from recognized sources will be used to identify core journals, to ensure that they will not be cut. Also journals deemed important by the Finance faculty will be retained.

F. **Faculty Teaching and Research Interests**

G. **Interlibrary Loan Activities**

H. **Circulation Statistics**

Includes using the online catalog to check use of specific titles, as well as analysis of various circulation usage reports.