Technology, Process Redesign, and the Evolving Role of Technical Services

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Too Much with Too Little!

• Growing collections
• Growing e-resource collections
• Shrinking technical services departments
In 1963: median vols. held = 1.1 million
In 2003: median vols. held = 3.1 million
In 1963: median vols. added = 54,000
In 2003: median vols. added = 60,000

Source: Cornell University Library Annual Statistics

Growing Collections

Growing e-Resource Collections

More resources (and better counting)
Impact of e-journal aggregations and consortial deals
ALCTS Acquisitions Technology Trends: Changing the Way We Do Business Program

2004 ALA Annual Conference Orlando

Shrinking Technical Services

Staffing

- Source: Cornell University Library
- Benchmarking survey in June 2002 suggests all ARL TS depts. are hard hit
- 22% reduction in staff size in past 5 years
- CTS FTE counts

Insert Miracle Here

Make a blind man see!

(using technology)
What if you looked in the mirror and there became two of you? (by boosting productivity)

Boosting Productivity

- Updating staff skills
- Changing workflows
- Rethinking assumptions
- Learning what users find truly important
- Better equipment and tools
- Better use of technology
- Managing change
Some TS Workflow Redesign Principles

- Look at the whole process (e.g., selection to ordering to receipt to cataloging to shelf-ready)
- To the greatest extent possible, handle items only once
- Capture bibliographic data as far upstream as possible
- Perform work where it makes the most sense
- Maximize acquisitions/cataloging collaboration
- Maximize use of support staff and students

1997-2000: Streamlining Workflows and Implementing a New Library Management System

- Elimination of almost all fastcat exclusions
- Backlog reduction project begins using Márcaida
- More cataloging done by acquisitions support staff or students
- Expanded approval plan (and more use of vendor records)
- CTS Information Technology librarian hired
- Top contributor to BIBCO (Program for Cooperative Cataloging)
- Backlog reduced by 55% between 1997-2000
- Voyager goes live June 2000
As a case study of process redesign

Why ITSO CUL?

What does ITSO CUL do?

How does ITSO CUL work?
ITSO CUL ... In the beginning...

- An idea—whispers in the dark
- A broader perspective
- The reality check
- The green light

ITSO CUL Goals

- Processing goals
  - facilitate paperless selection
  - recycle information and effort in support of acquisitions process
  - exploit existing tools
- Cost savings goal
  - staff resources
- Extra benefit
ITSO CUL – What it is NOT

- an original idea
- a comprehensive solution
- ILS platform specific
- written with proprietary software
- finished
Easy Acquisitions Made Easy

• Chron job to pull the day’s orders
• Incorporate local data into MARC record
  • fund code
  • price
  • notes
• Assign vendor
• Load records

Summary of Benefits

• Recycling the bibliographic data used in the review process to support ordering and cataloging
• Reduced sorting of paper review slips to selectors
• No more duplication between vendor review slips
Summary of Benefits, continued

- More control over encumbrances and fund codes
- Decreased paper shuffle between Acquisitions and Collection Development units
- Quicker turnaround from selection to order

Thank you

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