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
- Median
  - Vols. added = 54,000

In 2003:
- Median
  - Vols. held = 3.1 million
- Median
  - Vols. added = 60,000

ARL Median Volumes Held, 1963-2003

Source: Cornell University Library Annual Statistics

Growing Collections

More resources (and better counting)
Impact of e-journal aggregations and consortial deals

Growing e-Resource Collections

Networked resources
• Source: Cornell University Library

CTS FTE counts

• Benchmarking survey in June 2002 suggests all ARL TS depts. are hard hit

• 22% reduction in staff size in past 5 years

**Shrinking Technical Services**

**Staffing**

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**Insert Miracle Here**

**Make a blind man see!**

(using technology)
Or ...

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

1997

- Elimination of almost all fastcat exclusions
- Backlog reduction project begins using Mêrcadia
- More cataloging done by acquisitions support staff or students

1997-2000

- Top contributor to BIBCO (Program for Cooperative Cataloging)
- Backlog *reduced by 55%* between 1997-2000
- Expanded approval plan (and more use of vendor records)
- CTS Information Technology librarian hired

2000

- Voyager goes live June 2000
The Integrated Tool for Selection and Ordering (ITSO)

- 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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