

OUTSOURCING? AN EVALUATION OF VENDOR ASSISTANCE IN TECHNICAL SERVICES



What We Will Cover

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- Port Townsend – Paper/hardback processing
Keith Darrock
- Jefferson County Library – A.V. processing
Daniel Heaton
- Sno-Isle Libraries – Electronic record
processing
Colleen Brazil, Jeanne Crisp



The Port Townsend Library

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- ❑ Small public library, 11 FTE
- ❑ Consortium member, shared ILS (Polaris) – PTL, Jefferson County, 5 public schools. All libraries have separate technical services departments.
- ❑ 65,000 items in collection
- ❑ Annual collection budget of approximately \$90,000

- ❑ Main library and bookmobile, 16.5 FTE
- ❑ Consortium member, shared ILS (Polaris) – JCL, Port Townsend Public library, 5 public schools. All libraries have separate technical services departments.
- ❑ 77,650 items in collection
- ❑ We processed around 8,500 items in 2013
- ❑ Annual collection budget is \$157,000

- ❑ Library district serving Snohomish and Island Counties
- ❑ 21 Libraries and Service Center
- ❑ 30 FTE for Collection Development, ACQ, Cataloging, Processing & Circulation Services
- ❑ Annual circulation over 9 million
- ❑ 1,000,000+ items in collection with 353,000 bibliographic records
- ❑ \$5 million materials budget

Port Townsend: Why Seek Change?

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- ❑ More efficient materials processing
- ❑ Faster shelf-ready materials delivered to patrons
- ❑ More staff time for other tasks (ILL, morning set-up, desk duties, etc.)
- ❑ Greater consistency in product presentation
Examples: spine label and barcode placement



Establish Processing Profiles

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- ❑ Processing profile forms
- ❑ Work with technical services staff to develop profiles that best fit library needs - full or partial?
- ❑ Send small test batch
- ❑ Make changes as needed
- ❑ Adjust staff workflows

Vendor Processing Profile Example



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COMPONENT PROCESSING

Please note: Processing involving spine and pocket labels, bar codes, catalog cards, and/or MARC record requires a completed Ingram Library Services cataloging profile.

☐ **Mylar®** (available only on books with dust jackets)

- | | |
|--------------------------------|---|
| <input type="checkbox"/> Taped | <input type="checkbox"/> Unfastened |
| <input type="checkbox"/> Glued | <input type="checkbox"/> Attach over maps/illustrations/writing |

☐ **Book Pocket** (choose location and placement)

Note: On books receiving Mylar, pockets cannot be located on the inside front and inside back covers.

Location

- | | |
|---|--|
| <input type="checkbox"/> Front flyleaf | <input type="checkbox"/> Back flyleaf |
| <input type="checkbox"/> Front inside cover | <input type="checkbox"/> Back inside cover |

Placement

- | | |
|--|---|
| <input type="checkbox"/> Centered | <input type="checkbox"/> ½" from _____ edge |
| <input type="checkbox"/> Flush with bottom | <input type="checkbox"/> Attach over maps/illustrations/writing |
| <input type="checkbox"/> Other _____ | |

Alternate location if maps/illustrations/writings are present: _____

☐ **Spine Label & Location** (please include completed cataloging profile)

Location

- | | |
|---|---|
| <input type="checkbox"/> Label unattached | <input type="checkbox"/> ½" from bottom book edge |
| <input type="checkbox"/> Flush with bottom book edge | <input type="checkbox"/> Label _____ inches from bottom book edge |
| <input type="checkbox"/> Attach label on dust jacket (or on book spine if no dust jacket) | |
| <input type="checkbox"/> Attach label only to book spine (under dust jacket) | |
| <input type="checkbox"/> Other _____ | |

Placement

- | | |
|--|--|
| <input type="checkbox"/> Text horizontal | <input type="checkbox"/> Text vertical |
|--|--|

Alternate location for spine label placement if:

- | |
|---|
| <input type="checkbox"/> Spiral bound materials: _____ |
| <input type="checkbox"/> Narrow spine books: (Ingram standard is to wrap to front if all call number is not readable) |
| <input type="checkbox"/> No spine books: _____ |

☐ **Spine/Pocket Label Set** (please include completed cataloging profile)

Location

- | | |
|--|---|
| <input type="checkbox"/> Label unattached | <input type="checkbox"/> ½" from bottom book edge |
| <input type="checkbox"/> Flush with bottom book edge | <input type="checkbox"/> Label _____ inches from bottom book edge |

WLA - 2014

Processing Costs / PTL Decisions

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Vendor A

Barcode	\$.20
Spine Label (Fiction only)	\$.20
Property Stamp	\$.15 x 2
Date Due Slip	\$.15
Mylar Covers (Hardbacks)	\$.65
5 mil Laminate Covers (Paperbacks)	\$1.99
Hardback total cost/per item	\$1.50
Paperback total cost/per item	\$2.84

Vendor B

Barcode	\$.13
Spine Label (Fiction only)	\$.13
Property Stamp	\$.13 x 2
Date Due Slip	\$.13
Mylar Covers (Hardbacks)	\$.65
5 mil Laminate Covers (Paperbacks)	\$1.15
Hardback total cost/per item	\$1.30
Paperback total cost/per item	\$1.80



Results

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- **Vendor** - shelf-ready materials, quicker, cheaper, more consistent
- **Staff hours** - greatest impact
- **Technical services department** - mending, processing of donations and some new materials, weeding, training/supervising volunteers
- **Other tasks** - morning set-up, interlibrary loan, shipping, receiving, invoice tracking, volunteer scheduling, supply ordering, answering phones, service desks, collection development
- **Next step** - A.V.

Thoughts About Costs

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- Costs in general
- Factors
 - Volume of business
 - Degree of processing
 - Customization
 - Purchasing contract – economy of scale
 - Quality of MARC records

Jefferson County: Why Seek Change?



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- Backlog of materials to be processed
- With completion of a library remodel we were already undergoing changes in staff duties. The time was right to evaluate our workflow.

Which Materials for Vendor Processing?

An informal study of processing workflow and time was performed. Media materials took the longest amount of time to process.



Media Processing



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Getting from the processing forms...

JEFFERSON CO RURAL LIB-PROCESS

[SAP Master:](#) 1000006888 [Proc Initials:](#) AMS

[Account Notes:](#)

[Format:](#) Audiobook

[Proc Type:](#) Capacity

[Marc Type:](#) None [Bonus Discs:](#) Do Not Process

[Format Instructions:](#)

[Case:](#) APPROPRIATE SOUNDSAFE CASE

[Case Inst:](#)

VIP Text Label	Number of Discs Label
VIP Text Label	Property Label
VIP Text Label	Scanable Barcode
VIP Text Label	Spine Label
Hand Applied Disc	Hub Label
Non Label Processing	Art Transfer

[Label Type:](#)

VIP Text Label

ID:	Label Description	Category	Supplied By	Info From
40416	Spine Label	Adult Fiction	Internally Created	Midwest Tape

Size	Location	Font Type	Font Size	Font Color
1X.75	S6	ARIAL	10	BLACK

[Label Notes:](#)

ADULT FICTION SPINE LABEL - SPELL OUT NUMERIC TITLES, REMOVE PUNCTUATION, EXCLUDE ARTICLES (A, AN, THE)

[Line Notes:](#)

"CD"

"F"

FIRST 7 OF AUTHORS LAST NAME

ID:	Label Description	Category	Supplied By	Info From
40415	Spine Label	Juvenile Fiction	Internally Created	Midwest Tape

Size	Location	Font Type	Font Size	Font Color
1X.75	S6	ARIAL	10	BLACK

[Label Notes:](#)

JUVENILE FICTION SPINE LABEL - SPELL OUT NUMERIC TITLES, REMOVE PUNCTUATION, EXCLUDE ARTICLES (A, AN, THE)

[Line Notes:](#)

"JCD"

"F"

FIRST 7 OF AUTHORS LAST NAME

... to CD Cases

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Bates is without training or talent, the very definition of anti-spy. Yet this failed spywar Paris is recruited by a foreign power and sent undercover to Washington. Somehow his way onto the staff of the powerful Senator Richard Russell, head of the Armed Committee, and from that perch gains extensive and revealing contacts with the crucial in the American political game. The Dulles brothers, Richard Bissell, Richard Helms,anson, Joe Alsop, Walter Lippmann, Roy Cohn, Ollie North-Winston befriends them all and betrays them for a quarter century. dy of manners burrowed within circles of power and information, *The Mole* is a witty story of Washington in the latter half of the twentieth century that asks the ques- much damage can be done by the wrong person in the right place at the right time? a as Winston's memoir, *The Mole* details postwar America from an angle uniquely off-cen- the Suez Crisis to the U-2 Crash, from the Bay of Pigs to Vietnam to Watergate, the ighly and factually conceived, marvelously convincing, and offers the listener a slight- sive character searching for identity and meaning in a heady time during one of his- st defining eras.

PERFORMED BY DAVID LEDOUX

Executive Producer: Will Snape
Producer: Michael Charzuk

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Redding Corral Design/Rachel Adam

scs / 15 hours : 21 minutes

/ ADULT FICTION

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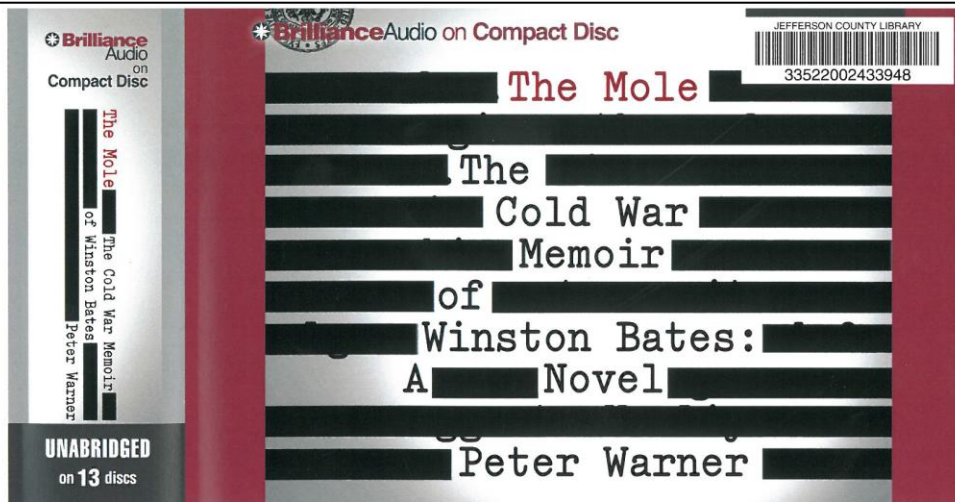
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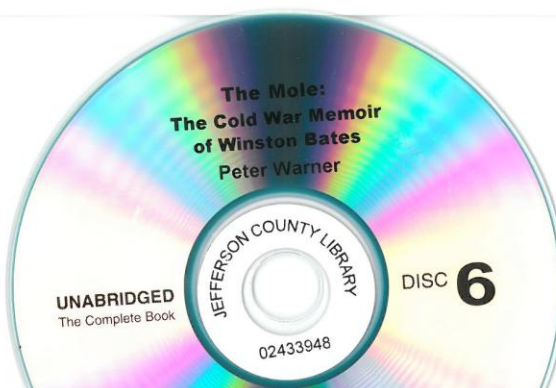


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CD
F
WARNER

13 DISCS



... to DVD Cases

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(LA GRANDE BELLEZZA)

For decades, journalist Jep Gambardella has charmed and seduced his way through the glittering nightlife of Rome. Since the legendary success of his only novel, he has been a permanent fixture in the city's literary and elite social circles. But on his sixty-fifth birthday, Jep unexpectedly finds himself taking stock of his life, turning his cutting wit on himself and his contemporaries, and looking past the lavish nightclubs, parties, and cafés to find Rome itself, in all its monumental glory: a timeless landscape of absurd, exquisite beauty. Featuring sensuous cinematography, a lush score, and an award-winning central performance by the great Toni Servillo, this transporting experience by the brilliant Italian director Paolo Sorrentino is a breathtaking, Felliniesque tale of decadence and lost love.

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- // New conversation between Sorrentino and Italian cultural critic Antonio Monda
- // New interview with actor Toni Servillo
- // New interview with screenwriter Umberto Contarello
- // Deleted scenes
- // Trailer
- // New English subtitle translation
- // PLUS: A booklet featuring an essay by critic Phillip Lopate

TONI SERVILLO CARLO VERDINE SABINA FERRI CARLO BUCCHIORELLI IMA FORTI FRANCESCA VILLORESI GALATEA RAMZI FRANCO GRASSANO GIORGIO FALOTTI MASSIMO POPOLIZIO SONIA GLESSNER ANNA DI LLA RUSSA LUCA MARRASLU SERENI GRANO TONY FERRARI VERNON DIBETTESI GIANCO CARANTINI LILLO PETROLO (LUGANO VIRGILIO GIOVANNI MERLI ANITA KAGANOV)

with MACARIO DE FRANCOSCHI with ROBERTO HOLSTEN and with ISABELLA FERRARI

An INDIGO FILM production, in collaboration with MEDIA FILM, in co-production with BARE FILMS, PARTI and FRANCE 2 CINEMA, an Italian-French co-production developed with the support of the MEDIA program of the European Commission, in association with BANCIA POPOLARE DI VICENZA, with the support of EURAGENCE, with the contribution of M.I.B.A.C. DIREZIONE GENERALE PER IL CINEMA, with the participation of CANAL+ and CINE+ with the participation of FRANGE TELEVISION Casting ANIMAMARIA SARACCIOTTI 1st assistant DANIELE BERTONE 2nd assistant UMBERTO FORNABUONI Administrative management CATERINA DI NELLA Make-up MAURIZIO STELLA Hairdresser ALDO SORRENTINO Sound editor SILVIA MARINIS Costumes DANIELA GAMBINO Set designer STEFANIA CELLA Supervisors PAOLO SORRENTINO UMBERTO CONTARELLO Screenplay PAOLO SORRENTINO Story LILLO PETROLO Editor CRISTIANO TRIVAGLIO A.M.C. Director of photography LUCA BICAZZI Associate producer CARLOTTA CALORI GUENDALINA PONTI Associate producer ROMANO LIGANDI VIVIANE ASSUNTA MARRAS SORRENTINO Executive producer VERA PRESHERN Co-produced by FABIO CONVERSI Co-produced by JEANNE SKYDUNK Produced by NICOLA GULIANI FRANCESCA CIMA Directed by PAOLO SORRENTINO

2 DISCS

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THE CRITERION COLLECTION

The Great Beauty

DVD EDITION

2013
142 MINUTES
COLOR
5.1 SURROUND
IN ITALIAN WITH
ENGLISH SUBTITLES
2.35:1 ASPECT RATIO

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THE CRITERION COLLECTION

The Great Beauty

A FILM BY
PAOLO SORRENTINO

DVD GREAT B

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Results

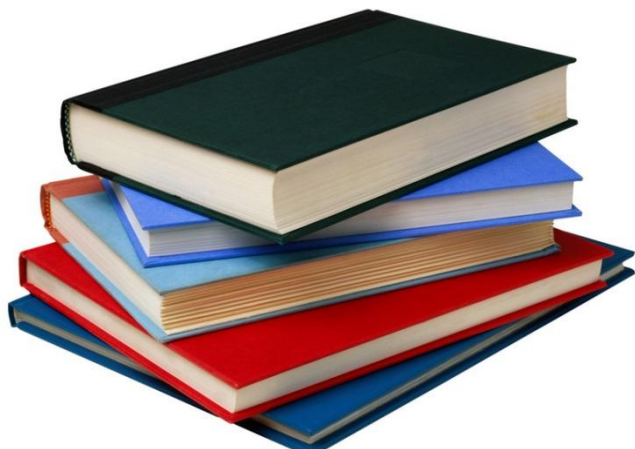


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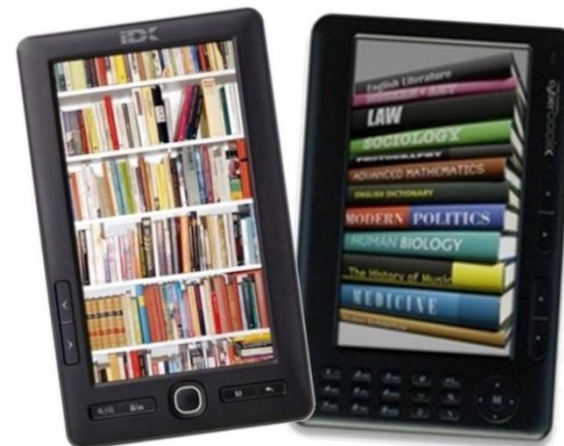
- Vendor processing is saving some staff time and we are mostly happy with the results.
- This project has shown us other areas in our processing workflow we can tweak for further improvement.

Traditional vs New Formats

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VS



- ☐ What is ownership?
- ☐ Is physical worth more than electronic?
- ☐ How does your catalog handle formats?

eContent Records Disparity



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Vendor	Type of Records Used by Sno-Isle
Overdrive	Purchase Full Records
3m	Free Minimal
Hoopla	No Records in Catalog
Gale Virtual Library	OCLC Records

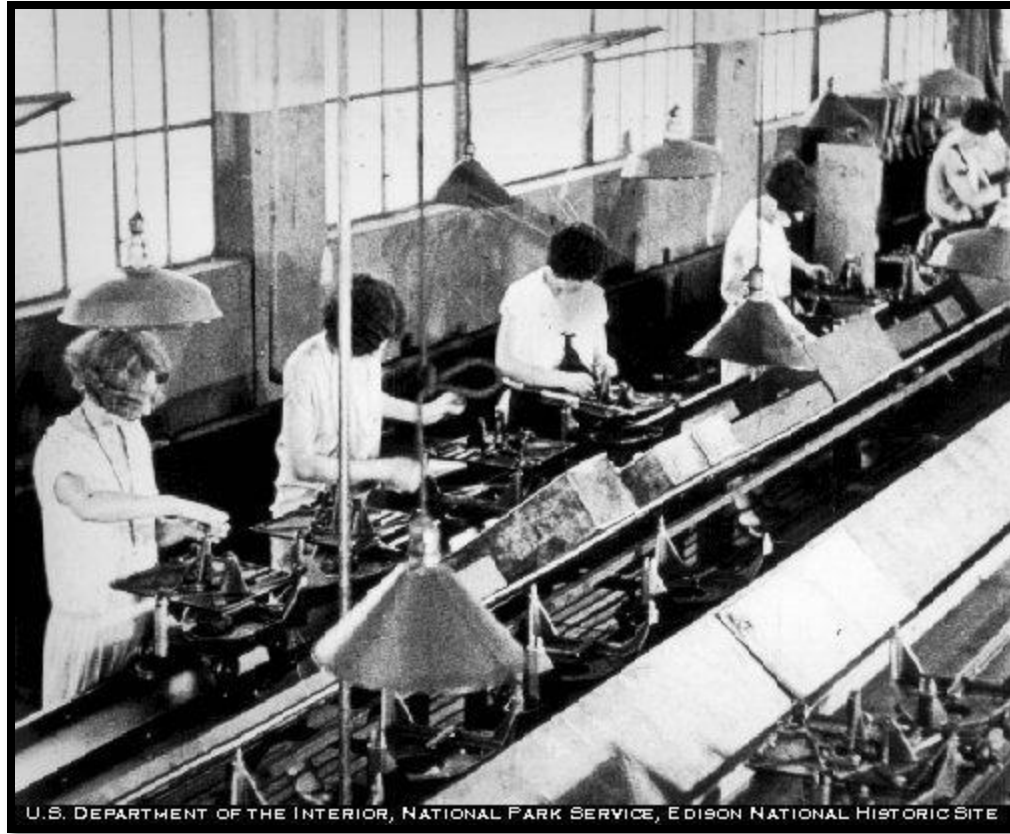
MARC Field Examples

Vendor Minimal Record	Vendor Full Record
100 1 aRoss, Lisa M.; Payne, Kim John. 4aut	100 1 aPayne, Kim John.
245 10 aSimplicity Parenting h[electronic resource] : bUsing the Extraordinary Power of Less to Raise Calmer, Happier, and More Secure Kids/ cRoss, Lisa M.; Payne, Kim John.	245 10 aSimplicity parenting h[electronic resource] : busing the extraordinary power of less to raise calmer, happier, and more secure kids / cKim John Payne with Lisa M. Ross.
505 No formatted contents note	505 0 aWhy simplify? -- Soul fever -- Environment -- Rhythm -- Schedules -- Filtering out the adult world -- Epilogue: Simplicity parenting to go.
700 No Added Entry	700 1 aRoss, Lisa M.

Authority Control

Title	Name Authority
Clear and Present Danger	Clancy, Tom
The Hunt for Red October	Clancy, Tom
Dead or Alive	Clancy, Tom, 1947-2013
Reached	Condie, Ally.
Crossed	Condie, Allyson Braithwaite
Let's Talk Turkey	Hearst (Publisher's name in Main Entry – Personal Name)

Process



U.S. DEPARTMENT OF THE INTERIOR, NATIONAL PARK SERVICE, EDISON NATIONAL HISTORIC SITE

Thoughts About the Role of the ILS

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- ❑ How data is handled?
- ❑ What can you achieve on import?
- ❑ What needs human intervention?
- ❑ How is authority control handled?
- ❑ Does vendor tagging work with your ILS?

Thoughts About Human Resources

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- How will outsourcing affect your technical services department?
- How will staff time be used if not for processing?
- Staff abilities, limitations and willingness to change
- Unions

Thoughts About Utopia vs Real World

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- **Goal** – Vendors provide full materials processing and shelf-ready items (Materials include barcode, spine labels, property stamps, date due slips - both books and A.V.)
- **Real World** – Vendors provide partial materials processing (Materials include barcode, spine labels (only fiction), property stamps, date due slips - A.V. yet to be included)
- **Goal** – Fully integrated cataloging (Vendor sends full bibliographic records, item records created upon ILS import with barcodes, class number/cutter created, appropriate MARC tags removed and created)
- **Real World** – Partially integrated cataloging (Records pulled from OCLC directly either in batches or item-by-item through ILS Z3950 connection, item templates created upon import but not all metadata included (barcodes and spine labels entered manually), some tags removed and created)
- **Goal** – Consolidation to single major materials vendor
- **Real World** – Consolidation to two major materials vendors
- **Goal** – Total staff support
- **Real World** – Partial staff support

Thank You!

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