The Changing of Technical Services at UNC Charlotte

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Michael Winecoff, "The Changing of Technical Services at UNC Charlotte" (2011). *Proceedings of the Charleston Library Conference*.
<http://dx.doi.org/10.5703/1288284314895>

The Changing of Technical Services at UNC Charlotte

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Abstract:

This session described how UNC Charlotte reorganized, repurposed, outsourced, and made efficiencies in the unit formally known as Technical Services. Now we are providing typical acquisitions and cataloging services with ten less staff, learning to accept imperfection and using cataloging expertise to describe items in our unique, special collections.

The Catalyst for Change

Atkins Library hired a new University Librarian who came with fresh ideas and experience. In order to help assess where we were and where we needed to be he brought in consultants to analyze our existing Technical Services workflow. The process

was quite extensive with interviews spanning an entire week. These two consultants interviewed all Technical Services staff and other library staff who interact with them. After about a month they presented the University Librarian with a detailed 100 page report along with recommendations.

Monograph Recommendations

Order all monographs from one vendor who can provide shelf-ready items when possible	Eliminate pre-order searching for mainstream titles
Load PromptCat MARC records to create the full bib, item, order and invoice records automatically	Receive and pay items electronically

Collection Development Recommendations

Eliminate Approval Plan review by faculty and liaisons	Develop subject-specific Approval Plan policies to accept all receipts
Implement electronic selection and notification "slips"	Involve subject librarians more fully in collection development
Stop negotiating with patrons about replacements	Consolidate and streamline standing order process
Adopt a more restrictive gifts policy	

Personnel Recommendations

Transition traditional cataloging staff from monographs to unique items hidden in Special Collections	Divide traditional documents staff between documents and Special Collections cataloging
Free up receiving and paying staff to catalog monographs	Eliminate majority of materials processing by outsourcing
Free up receiving and paying staff to catalog monographs	

Miscellaneous Recommendations

Implement a Millennium/Banner automated accounting interface	Catalog CIMC curriculum materials to collection level rather than item level
Reduce staff involved in monograph workflows	Implement Unicode in catalog rather than existing transliterated form
Eliminate manual tallies whenever possible	Purchase e-books for desirable and helpful
Fast catalog non shelf-ready materials	Catalog only to level needed
Reduce serial check-in and claiming as much as possible	Eliminate the Browsing Collection in favor of a New Books display
Permanently reduce binding of periodicals	Reduce fund structure from 800 to 200 funds

The reorganization of Technical Services took place in several stages. As you can see, the unit was quite large before any changes took place.

In July 2010 Monographs Acquisitions staff left Technical Services and were put under Information Technology. Following this move was

Post Cataloging Quality Control in January 2011. Both of these moves were organizational so no staff physically changed locations.

In January 2011 staff previously under the Bibliographic Organization and Documents sections were move to Special Collections. These

staff members also continued to reside in the “Technical Services” area.

After all the changes the remainder of the staff remained under the leadership of the Associate University Librarian for Technical Services. Shortly

thereafter his title was changed to Associate University Librarian for Collection Development & Electronic Resources.

Functional Staff Changes

	Before	After
Ordering	2 staff	1 staff
Receiving & Paying	1 staff	1 staff
Cataloging	1 librarian; 5 staff	1 librarian; 1½ staff
Documents	3½ staff	2½ staff
Collection Development	2 staff	1 staff
Serials Check-in	2 staff	1 staff

Retirees	
	Head of Cataloging
	Head of Collections Development
	CIMC Cataloger
	Approval Plan Coordinator
	Acquisitions Ordering Specialist
	Professional Cataloger
Exits	
	Records Editor
	Part-time Documents Assistant

We did realize that there was both good and bad that came out of the changes. Below are some of returns on investment and obstacles.

Rewards

Special Collections has digitized and described over 3100 of photographs and post cards	85% monographs are processed without staff intervention. That's over 9,000 books that go straight to the stacks!
Staff are responsible for more challenging tasks	Some staff received raises because of job changes
Books will be available more quickly	Some staff retired because of the changes

Difficulties

Errors will sometimes not be caught	No one to monitor changes in cataloging
Books still arrive from other vendors and need to be handled by our staff	There is no expert to make cataloging decisions
No expertise for alternate formats like music	Must rely on system reports to find some errors
We still receive poor PromptCat records	Some staff have had trouble adjusting
New attitude – <i>As long as it's good enough</i>	Some staff retired because of the changes

Conclusion

Over all most staff are happy with their new responsibilities. We are providing more and better access for Special Collections materials due to the

staff changes and monographs are getting to the public quicker. Administration is pleased with more efficiencies and reuse of positions and finally, everyone who stayed still has a job!