Biz of Acq - Creative Outsourcing

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Biz of Acq — Creative Outsourcing

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What We Did

At Weinberg Memorial Library, University of Scranton, there was a need to "wrap up" a special acquisitions project. The project involved ordering books that the library did not own from lists contained in Books for College Libraries, 3rd edition (BCL3). The remaining titles to be ordered to complete this project filled forty-five looseleaf binders which translated into over 4,000 MARC records.

The library was committed to completing the ordering from the original BCL3 selections by the end of the 1996/97 fiscal year. The Acquisitions Department had only three months to pre-order search, import records into our online system, and place orders for the 4,000 titles. The Department quickly realized that with the current number of staff on hand — one acquisitions librarian and two acquisitions clerks — and the staff's current workload, it would be all but impossible to

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And They Were There
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The second day also offered presentations of interest to all types of librarians on broad and more specific topics. These ranged from international exchange opportunities, to library outreach projects, and to the findings of a research project on subject searching in an online catalog with English and Spanish records. There were sessions on different topics for academic, public, school and special librarians, and the conference concluded with a planning session for the next Foro, followed by a festive banquet at the UCR University Club, sponsored by OCLC. Among other sponsors and vendors, there were booths of BIOSIS, Brodart, EBSCO, Information Access Co., Electronic Publishing, the Institute for Scientific Information, Latin American Book Source, Libros Latinos, NewsBank, OVID Technology, the Patent and Trademark Depository Library Program, Bowker, Reforma, SoftLine Information, and Swets Subscription Service.

Overall, participants were happy with the quality and number of programs and praised the efforts of the local organizing committee. Since the Foro has no governing body, no membership or any official structure, the success of every one depends largely on the efforts of those who volunteer to host the event. Indeed, one of the questions on the minds of many was the issue of governance, and whether or not it is time to become a more structured organization. For many, the beauty of past events has been the friendly and highly informal gatherings of the last eight years; however, given that local organizers must face all challenges — from the financial commitment of their institutions, to the contractual ones with hotels and caterers, to arranging programming and local transportation — perhaps the time has come for those involved in past events to decide which direction future Foros should follow. Regardless of what happens, though, the need for more and better communications among our colleagues in the global society will still be there, stronger and more urgent than ever and it is our responsibility to do what we can to broaden our horizons.

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do this volume of ordering without some kind of outside assistance.

Since we could not add even a temporary staff member to help us, we had to think about our acquisitions workflow and what tasks we could have an outside source accomplish without compromising the quality and integrity of our operation. So, we contacted the vendor handling the major portion of the book orders for our project, Midwest Library Service, and began a dialog detailing what our needs would be.

When we analyzed what we were doing, we realized that the most time-consuming part of the ordering process was importing the order record into our online acquisition system. Each title had to be searched and copied through our online system, DRA. We had access to records in the Books in Print, Blackwell's New Titles Online and LCMARc databases through DRA's server. Once the preorder record was located, it was copied into the library's local catalog, and then brought into a purchase order. If a record for a title that we wanted did not exist in any of these databases, it would have to be typed and added into the catalog by hand.

Through the DRA system, we had the capability of loading bibliographic records into the online catalog if they were given to us on a 3 1/2" diskette in MARC format. What we needed was "someone" who could search the titles from our BCL3 listing in these databases, and select and download the records that we wanted. After we explained our needs to Midwest Library Service, they thought about the project and decided to take on the task. Their charge for providing the service would be $.45 per record.

**Check and Double Check**

Our first step in this process was for the Acquisitions staff to check in the online catalog to make sure that all the records were in the database and had been downloaded. The BCL3 list of titles sometimes contained different dates, system versions, or other versions of the original records, so it was the Acquisitions staff's responsibility to ensure that all the records were present and up-to-date.

Once the staff had identified the correct records, they removed the printed copies from the binders and recorded the call numbers and title information for each group of records that were sent to Midwest Library Service. They were then kept in a log file. Three to four groups of records were sent at a time via Priority Mail.

**When Your Outsourcer Outsources**

Midwest, in the meantime, had decided to outsource the next part of that process with another company, The Catalog Card Company (3Cs). They would search a tape database of MARC records using the ISBN numbers and titles of the records we had selected, and download the appropriate records onto a 3 1/2" diskette. The original paper records would then be returned to us, along with a diskette containing those records that 3Cs could locate, and a printout detailing the downloaded records.

This seemed like the perfect solution to a complex problem. It was not without its drawbacks and difficulties, however. When the first diskette arrived, it was missing over fifty records. We went back to our original outsourcer, Midwest, to alert them to the problem. They in turn had to contact their outsourcer, the Card Catalog Company, to find out what went wrong.

Another glitch occurred with the price information. In order for the price information to appear in the correct position in records in the library's online acquisition system, the price information needed to be recorded in the 020 field, subfield 4, of the MARC record. However, as Midwest was to find out, 3Cs could not accommodate that modification to the 3Cs records they were downloading. The Catalog Card Company had previously used an alternative 900 note field for this information, and their download program did not have the flexibility to insert the information into the appropriate field and subfield for our system. The Acquisitions staff coped with this difficulty as well by typing the correct price into the cost field when the record was added to a purchase order. Midwest was finding out what librarians have known all along: outsourcing can be a frustrating business!

**Finishing the Job**

Once these challenges had been resolved, we moved ahead with our project. The records on each computer diskette were uploaded into the library's online catalog. This task had to be done at the end of the day after technical services had finished adding or modifying records. This was done so that the uploaded records would be given consecutive database control numbers. (In the DRA system, a database control number is assigned to each title that is added to the online catalog, and is used to call a particular record up for modification or deletion.) As an added bonus, the upload program checked the records being added to the library's online catalog, and prevented any duplicate records from being added. This proved to be a valuable feature because, even after all of our careful pre-order searching of the catalog, a few duplicates popped up during the upload procedure and were quickly eliminated.

Next, the Acquisitions staff used the download reports that came along with the diskettes to identify those records that had been added to the online catalog. This was a kind of quality control check to make sure that all of the records that had been sent to Midwest had been downloaded. Staff placed the database control numbers for each record next to the titles on the report. As it turned out, the Catalog Card Company could not locate all of the records that were needed on the tape they were searching so the Acquisitions staff had to create some of the records that would be used for ordering. However, this was a rather small portion (less than one percent) when compared to the total number of records downloaded.

Once the records had been matched to the database control numbers, staff could create purchase orders. Staff added each record to a purchase order, assigned funds, and then sent the purchase orders back to Midwest to complete the ordering process.

To date we have been able to fill over 30% of the titles ordered through this procedure, and expect that this percentage will grow over time.

**Pros and Cons**

As Midwest found out, when you outsource a procedure, you lose direct control over what is happening at each stage. Your standards of quality are not always the same as those of the company that is providing the service. After the first diskette arrived with missing records, Midwest stepped in and provided additional quality control to make sure that the problem did not happen again. Further, your needs and what an outsourcer can provide do not always match up completely; the situation may require compromise. For example, the Catalog Card Company was able to search and download most of the records we required, but they were not able to modify them to add the price information. Again, to their credit, Midwest adapted the per record download charge from $.45 per record to $.43 per record to make up for the additional work that the Acquisitions staff had to do as a part of the ordering process.

For the most part, the records that 3Cs chose were correct. However, the Acquisitions staff provided quality control over this operation by checking the downloaded records against the original BCL3 sheets. The fact that there were occasional misses demonstrates the need for someone to oversee the outsourcer's work. The Acquisitions staff also added pertinent details to the records that an outsourcer could not be expected to pick up, such as whether a title was a multivolume set.

On the bright side, the Acquisitions Department was able to meet its fiscal year 1996/97 ordering deadline with no problem. Being able to load in large groups of records without having to search and copy them from other databases did make a significant time difference. Having worked with the BCL3 records in the binders to create orders, I knew that if we had that same member an entire week just to get through one binder — and we had 46 binders to work with!

Did outsourcing really save money, or would hiring a temporary assistant have been more cost-effective? The decision was made to continue outsourcing. The savings were realized. Out of 673 titles ordered, 404 were purchased, for an average cost of $7.24 per title. The results were gratifying.

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The ALCITS Role of the Professional in Academic Technical Services Discussion Group is planning a program at the upcoming ALA Annual Conference in Washington, D.C. The group will meet from 2:00-4:00 p.m. on Sunday, June 28th. And the topic is — Is Technical Services Being De-Professionalized? What exactly is happening when paraprofessionals in Technical Services are given duties previously performed by professionals? Are we on the verge of being eliminated? Come and share your thoughts, insights and experiences.

You probably already know about this address, but in case you don’t MX BookFinder at http://www.mxbf.com/ includes Amazon Books, Interloc, Bibliotex and Powell Books.

Have you read the NASIG sagas in the last few On the Road columns which Don Jaeger has worked hard to get? They are hilarious. Well, I just heard from Connie Foster <RFOSTERC@wkuvm.wku.edu> who wrote one of them. Connie has NEVER been to a Charleston Conference. Hurray! We have to correct that! And while you’re at it, see Jim Mouw’s contribution to On the Road in this issue, p.92.

This is from The New York Times, April 28, 1998. We told you to expect it (see Who Owns What Now?, ATG April, pp.52-53). Well, Times Mirror Co. has agreed to sell its legal publishing business to Reed Elsevier for $1.65 billion in cash. The agreement includes the publisher Matthew Bender & Co. and Times Mirror’s 50 percent share of Shepard’s.

There is still no official word out on the sale of KRIT including UnCover and CARL Corporation. We are trying to find out what we can. Stay tuned.

Martin White <Martin.White@tflpl.com> http://www.tflpl.com is a new ATG subscriber! The subscriptions are GROWING! Several come in every day! Thank you one and all! And tell your friends about ATG! Spread the word!

Recently met Ben D’azzo <bdazzo@infonautics.com> Southeastern rep from Infonautics, Inc. Ben used to work for EBSCO Subscription Services and is somebody who is fun to talk to!

OOPS! The Faxon Institute meeting report in the April ATG (p.72) mentioned Eric Siegel and it should have been ROBERT! Apologies.