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Biz of Acq — Creative Outsourcing

by **Narda Tafuri** (Acquisitions Librarian, Weinberg Memorial Library, U. of Scranton, Scranton, PA 18510) <Tafurini@uofs.edu>

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Column Editor's Note: Perhaps no topic receives more attention in the library literature today than outsourcing. Yet many librarians remain unsure about when to turn to outsourcing as a solution and how to implement outsourcing projects in a way that does not undermine the morale of permanent staff. In this column, Narda Tafuri, Acquisitions Librarian at Weinberg Memorial Library, University of Scranton describes an actual, successful outsourcing project in acquisitions. Three aspects of this project seem especially noteworthy — 1) the project was carefully tailored to accomplish a specific goal; 2) it did not involve eliminating permanent staff; 3) permanent staff proved to be indispensable in providing quality control and in solving problems the contractor could not address.

In this article I hope to present some of the good points and bad points of outsourcing as encountered through personal experience. I think librarians would agree that not all outsourcing is a "bad thing." Issues of collection development aside, anything that can help save the time and effort of staff so that it can be re-directed from mundane tasks to more specialized functions can't be all bad. Outsourcing can be a way to add staff and/or supplies when there is no additional money for either.

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 order 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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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.

Against The Grain / June 1998

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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 acquisitions 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 items that were to be ordered were not already there. The *BCL3* list of titles sometimes contained different editions or other versions of texts that were already owned by the library. The Acquisitions staff highlighted those items that were still needed by the library. The staff then checked each title in the *Books in Print* online database for current availability, price and ISBN, and noted this information next to each record in the binder. If the staff determined that an item was "out of print," they also noted this information next to the record.

Once the staff had identified items to be ordered, they removed the record pages from the binders. Sheets logging the call numbers and number of titles for each group of records that were sent to Midwest were 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** (3C's) 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 3C's 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 acquisitions system, the price information needed to be recorded in the 020 field, subfield "c," of the MARC record. However, as Midwest was to find out, 3C's could not accommodate that modification to the 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 download procedure and thus 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 3C's 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 it could take a staff 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

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Profile Encouraged

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Born: November 5, 1946, Lubbock, Texas

Residences: A fourth-generation Texan who 'went bad' and moved to California at age 20, relocated four years ago to current residence in Sandy, Utah, a suburb of Salt Lake City, just outside Little Cottonwood Canyon leading to Snowbird and Alta ski resorts. Moved here from San Jose, California, to work for **Dynix** (now **Ameritech Library Services**). Now free to live anywhere in the U.S. or Canada, decided to stay and enjoy the beautiful mountains and newly-remodeled kitchen.

Education: BA Administrative Studies, **University of California, Riverside** 1977. MLS, **University of Southern California School of Library and Information Management** 1980. Earned both degrees while working fulltime in the general library (now **Tomas Rivera Library**) at UCR.

Summary of job experience: Employed for 13 years at **UC Riverside** as Library Assistant, Head of Acquisitions, then Reference Assistant. UCR served as a training ground for me, and I have several mentors there to thank for steering me into the library profession. After finishing my library degree, I worked at **CLASS** in San Jose for 5 years (**Cooperative Library Agency for Systems and Services**, now defunct). I then became an independent consultant for 2 years. My biggest project during this time was helping establish the **Silicon Valley Information Center** at the **San Jose Public Library**. The Center later lost its funding after a change in library director, and is now defunct. I also taught various library school classes as adjunct associate professor at **San Jose State University School of Library and Information Science**, while at **CLASS** and working independently. I joined **EBSCO** as sales representative covering Northern California and Hawaii out of the San Francisco office, then was promoted to Director of Library Automation at headquarters in Birmingham. I left **EBSCO** after a total of 5 years to live back in California with my husband (a 2,000-mile commuter marriage is tough) and to travel less. At that time, I joined **CASPR** (Macintosh-based library automation) as VP of Marketing, stayed 2 years, then joined **Dynix** (now **Ameritech Library Services**) as product manager for **Marquis** (now **Horizon**). As part of Ameritech's restructuring, my team was eliminated, and I was happy to find a new opportunity with **Blackwell's** about 2 years ago.

Family: Husband **Bill**, an independent consultant for the medical device industry. Two grandchildren (his, but I claim them) who live in San Jose. Two Siamese cats, **Tai** and **Pia**, who kindly share their house with us.

Proudest Accomplishment: Having experienced such a variety of aspects of my profession.

Most recent goal: To explore new ways of expanding electronic access to information; to make it easier, not harder, than manual methods. There are plenty of challenges in everyone's daily lives; getting information shouldn't be one of them.

First job: Checking out books for elementary school library in a musty old basement when I was in third grade.

First job with pay: Serving food at lunch counter at **Kresse's** (now **Kmart**) in El Paso, when I was 16 years old, with the goal of buying my own car. I reached the goal, with some help of a down payment from my Dad. This experience convinced me to stay in school.

Fondest memories: Collected from times spent riding a BMW motorcycle with my husband and other members of the **BMW Club of Northern California**. While riding my bike, I had to give my undivided attention to riding, with no time to worry about work or any other problems. Met some wonderful people, mostly professionals in other industries, and saw lots of beautiful places. Made some progress toward busting the stereotyped image most people have of bikers.

Favorite pastime: Watching laser disc movies from my husband's extensive personal library in our home theater.

Hobbies: Reading, especially mystery novels, walking, cross-stitch, crocheting and trying to understand how cats think.

Last book read: *Midnight in the Garden of Good and Evil* by **John Berendt**. (To my **ALAMW** dinner companions: You convinced me to read this — Thanks!)

What I would like to be when I grow up: An architect.

What really drives me nuts: Telephone salespeople who call at dinnertime.

Single most important piece of advice: As I wrote this profile, I became keenly aware of the amount of change, not only that I've experienced directly, but that I've observed in the library and information science field. Yes, I've changed jobs a lot. Most of the job changes were to take advantage of new opportunities. Some were because the jobs and/or companies had changed and were no longer what I needed for my career. Many of the organizations and products with which I've been associated have changed names, gone defunct, been bought or merged, or otherwise are no longer the same as they were. While I like change, I've often been impatient with the process of change, wanting everything to be "fixed" immediately. One of my early mentors used to tell me to have patience. I've tried to follow this advice throughout my career and, therefore, I pass it along as my advice to others. However, I still agree with **Ambrose Bierce** who called patience "a minor form of despair disguised as a virtue."

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part-time staff member have been more cost effective? The total cost of downloading 4,796 records was \$2,018. The cost of hiring someone to work a 35-hour week for 15 weeks (approximately three months) at the rate of \$7.20 per hour would have been approximately \$3,780. Given that the average binder took one person approximately one week to work through and there were 46 binders, I do not believe that one person could have completed all of the required ordering. In addition to the **BCL3** orders, the Acquisitions staff had to finish up ordering from the library's regular monographs budget, as well as complete a number of other special projects before the end of the fiscal year.

Both **Midwest Library Service** and the **Catalog Card Company** provided good quality service. However, there was no substitute for the quality control that the Acquisitions staff contributed to the project. Without the Acquisitions staff overseeing the record selection, downloading, and other procedures every step of the way, what turned out to be a very inventive solution to an acquisitions problem could have ended up as an acquisitions disaster. If there is any lesson to be learned from our story about using creative outsourcing, it is this — outsourcing is a means to an end, but it is not the end itself!

Rumors from page 68

The **ALCTS 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**, **Bibliocity**, 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@wkyuv.wku.edu> who wrote one of them. Connie has NEVER been to a **Charleston Conference**. Hrumph! 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 **KRII** including **UnCover** and **CARL Corporation**. We are trying to find out whatever we can. Stay tuned.

Martin White <Martin.White@tfpl.com> <http://www.tfpl.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.

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