Inside Outsourcing Technical Services: Upsides and Downsides

Stacey Marion

Alayne Mindt

Follow this and additional works at: <https://docs.lib.purdue.edu/atg>

Part of the [Library and Information Science Commons](#)

This document has been made available through Purdue e-Pubs, a service of the Purdue University Libraries.
Please contact epubs@purdue.edu for additional information.

ALA MIDWINTER ISSUE

TM

VOLUME 31, NUMBER 6

DECEMBER 2019 - JANUARY 2020

Against the Grain

"Linking Publishers, Vendors and Librarians"

ISSN: 1043-2094

Inside Outsourcing Technical Services: Upsides and Downsides

by **Stacey Marien** (Acquisitions Librarian, American University Library) <smarien@american.edu>and **Alayne Mundt** (Resource Description Librarian, American University Library) <mundt@american.edu>

When we were approached with guest editing an issue of *Against the Grain* on outsourcing technical services, we jumped at the opportunity. Our regular column in *ATG*, *Let's Get Technical*, focuses on practical solutions to common problems in technical services. Outsourcing is a popular and longstanding solution for technical services departments aiming to improve efficiencies or reallocate staff time into different or more expert areas. Outsourcing can also help libraries who are facing budget or

staffing constraints or lacking in-house expertise. At **American University**, we outsource several processes to vendors, so we wanted to provide a variety of perspectives on the issue. The articles in this issue come from different types of libraries, give a vendor perspective, talk about leveraging technology and expertise in different ways, and describe the experience of libraries who have once outsourced but ended up bringing portions of it back in-house.

As can be seen from the stories in this issue, outsourcing can take a variety of shapes. We

look at outsourcing from a vendor's perspective in **"Outsourcing: A Librarian Vendor Perspective,"** by **Charles F. Hillen**, Director of Library Technical Services for **GOBI Library Solutions at EBSCO**. He profiles the many factors that need to be considered in outsourcing to a vendor. From selecting and ordering to cataloging and physical processing, starting small and keeping open communication ensure success between libraries and outsourcing vendors.

In **"Gig Cataloger: Working as an Independent Contractor on an Outsourced Reclassification Project,"** Catherine Eilers, now at **Highland Park Public Library**, docu-

continued on page 8

If Rumors Were Horses

Hear! Hear! is in order! What was formerly the "Scholarship for Librarians with Limited Institutional Support" is now the **"Lynn Fortney Librarian Award."** WOW! The awarding association is the **Alabama Health Libraries Association — AL-HeLA**. The gregariously wonderful **Lynn** is well known by all of us! Prior to her retirement, **Lynn** was **VP and Director of the Biomedical Division for EBSCO Information Services**. **Lynn** is also the spouse of **Scott Plutchak**, another gregarious wonder! Congratulations to this power couple!

Check out this great video from *Atlas Obscura* that highlights **Hay-on-Wye** the small Welsh town which "was once declared an independent kingdom of books" by bookshop owner **Richard Booth** who at the same time "appointed himself its king." The rest is history.

Hay-on-Wye advertises itself as **"the United Kingdom's mecca for bibliophiles."** The town "is less than one square mile in size, but it's packed with independent booksellers curating all kinds of used and antique reading..." <https://against-the-grain.com/2020/01/the-tiny-welsh-town-thats-brimming-with-books/>

The indefatigable **Tom Leonhardt** took a trip to **Hay-on-Wye** and wrote about it for *ATG*! We haven't seen much from **Tom** recently so I decided to ask him what was up. Great news! **Tom** says we may be seeing a column or two from him in the near future! Guess what! I just got a charming **Oregon Trails** about books and booksellers! Watch for it in our next issue.

Hoooha! **Jack Montgomery** has won the **WKU 2019 "Margie Helm Faculty Award for Outstanding Per-**

continued on page 6

What To Look For In This Issue:

<i>The Innovators</i>	56
<i>Transitioning to a New IR Platform</i> ...	58
<i>Segmenting User Groups for Greater Inclusivity</i>	61
<i>The Ultimate Library Instruction</i>	65
<i>Building Relationships</i>	66
<i>A Modest Proposal</i>	85

Reviews

<i>Reader's Roundup — Monographic Musings & Reference Reviews</i>	43
<i>Booklover</i>	48
<i>Collecting to the Core</i>	49

Profiles Encouraged

<i>People, Library and Company Profiles</i>	76
<i>Plus more</i>	See inside

1043-2094(201912/202001)31:6:1-3

Take a closer look at....

The CHARLESTON REPORT

Business Insights into the Library Market

You Need The Charleston Report...

if you are a publisher, vendor, product developer, merchandiser, consultant or wholesaler who is interested in improving and/or expanding your position in the U.S. library market.

Subscribe today at our discounted rate of only \$75.⁰⁰

The Charleston Company

6180 East Warren Avenue, Denver, CO 80222

Phone: 303-282-9706 • Fax: 303-282-9743

Inside Outsourcing Technical ... from page 1

ments the time she spent as a contract cataloger working on a reclassification project for an archaeological research institute in Europe. She pulls the curtain back on how outsourcing cataloging projects works for the individual contractor.

We also profile instances of new ways of working with vendors and vendor platforms to improve library services. In **"OhioLINK and Vendor Records Quality Control,"** Emily Flynn, the Metadata & ETD Coordinator at OhioLink, details how they have reported errors to vendors and worked with them to improve record quality. She advocates for persistence in communicating problems to vendors and for the library community to band together to communicate problems in vendor-provided records sets, as vendors may not be hearing about problems in order to make needed improvements.

Outsourcing does not always reduce the amount of work performed in-house. It can result in trading one type of work for another that requires different skillsets. At the **University of Maryland Libraries,** Benjamin Bradley, Discovery Librarian and Beth Guay, Continuing Resources Librarian, interpret outsourcing as the library transitioned to WorldCat Discovery. They outline the multitude of issues librarians face when the library catalog itself

is outsourced, requiring the need to work with third parties for troubleshooting, and some of the tradeoff in terms of metadata display, the user experience, and being at the mercy of the vendor's timeframe for enhancements and updates. On the flipside, it also presents opportunities for greater efficiencies in managing large packages and providing more seamless access to ETDs and requires different expertise and skillsets to manage.

Foreign-language cataloging projects are a prime area for traditional cataloging outsourcing. As we can see in **"Outsourced Cataloging of Materials in Languages for Which There Is No In-House Capability,"** Joshua Hutchinson, the Cataloging and Metadata Librarian at University of California, Irvine details how UCI has developed agile methods to catalog growing Korean, Armenian, and German language collections when there is no in-house expertise. A pilot project that we would be interested in trying at American University is exchanging language cataloging expertise between two libraries as described in **"Homegrown Outsourcing: A Cooperative Cataloging Pilot Between Duke University and the University of North Carolina at Chapel Hill."** These two libraries, both in the Triangle Research Libraries Network (TRLN) consortium developed a pilot to exchange foreign-language cataloging expertise. Denise Soufi from University of North Carolina at Chapel Hill and Nanako Thomas and Natalie Sommerville, both from Duke

University outline how they collaborated to exchange Japanese and Arabic books for cataloging, a cost analysis of such a project, and the ultimate benefit of the exchange over outsourcing to an external vendor.

Special libraries are not exempt from the possibility of outsourcing, either. In **"Outsourcing Technical Services in a Health Sciences Library,"** Demetria Patrick, the Technology Librarian at Northeast Ohio Medical University and Melanie McGurr, Head, Electronic Services at University of Akron describe the challenges of outsourcing technical services when there is no technical services staff and working with OhioNET and OCLC to do the work. They also document strategies to help library administration understand the importance of technical services in ensuring a library's success, lessons that can certainly be applied outside of special libraries.

Sometimes technical service units discover that there are reasons to bring all or partial outsourcing back in-house. These reasons can range from cost saving measures to wanting more control over resource description. In **"Jumping Into and Then Climbing Partially Back out of the Pond,"** Kay Johnson and Elizabeth McCormick from Radford University describe their experience over the past ten years of initially outsourcing their bibliographic records and processing for print books and then deciding, because of budget cuts, to bring the processing of books back into the department. They recommend that whenever a library is considering outsourcing, it's important to weigh the cost of the service versus the personnel cost of keeping the work within the library.

In **"Streamlining Workflows: Combining In-House Cataloging and Outsourcing to Achieve Institutional Success,"** Cecilia Williams, Nikita Mohammed, and Amber Seely from Harris County Public Library document the process of bringing most of the outsourcing cataloging and processing back in-house. This has enabled their library to speed up time to shelf and provide a more customized collection for library patrons. Bringing outsourcing back in-house has also led to an increase in staff morale, greater in-house technical expertise. Converse to the perception of outsourcing, insourcing has improved efficiency within their organization.

Finally, Moriah Guy from GOBI, and Moon Kim, Acquisitions Librarian at Ohio State University, formerly at California State University, Fullerton, outline a collaboration between a vendor and library in **"A Peek Inside Vendor/Library Partnership to Establish a Firm Order Workflow Through a Consortial Migration."** They developed a process during their migration to Alma that enabled them to avoid incurring duplicate record fees in a consortial environment where bibliographic records are shared with other libraries in the CSU system. 🌿