Symposium on Technical Services
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Panel

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Question 1: What impacts/outcomes do we envision for the next 3 - 5 years for research libraries?

Trends in Higher Education
1. Do we Train or Educate?
   a. discussion of the core curriculum
      - need to define education essentials
      - return to fundamentals?
   b. learning is a lifelong endeavor
2. Must be Competitive
   a. the student as “customer” sees college as a commercial enterprise from which to receive a service -- an “education”
   b. as a customer-based system, focus is on convenience, quality, service and cost
      - students are older, remotely-located (distance education); delivery will become more technology-driven
      - education on demand -- asynchronous delivery will increase
3. There will be an Increase in Accountability/Responsibility
   a. in such a competitive environment, there will be increasing pressure towards
      - expanding an institution’s “delivery” to non-traditional, remotely-located students
      - cost control and containment
   b. the emerging mantra is: “we need to keep education affordable”

The Internet and Other Technologies
1. The Internet will increasingly be used as a mission critical delivery mechanism of information: data, voice, multimedia, etc.
2. Projects such as Internet2 and vBNS will result in improvements in applications especially in multimedia such as video.
3. “Killer applications”
   - video conferencing
   - virtual, remote control of instrumentation
4. Personal Data Assistants (PDAs) will become more common and be used alongside powerful PC workstations and laptops.
5. Wireless communications replace the need for local (roomed) physical LANs.
6. Result: we will become increasingly mobile with high-speed access to any and all information formats.
Scholarly Publishing and Research Libraries
1. Publishing will increase; may be an increase in specialized, small presses as print outlets. Electronic publishing venues will flourish.
2. Use of the web as the “student-preferred” delivery mechanism for full-text journals will increase.
3. Mergers of information vendors will continue:
   - Reed Elsevier: Shepard’s and Matthew Bender in law; more recently JAI
   - fewer mega-publishers will result in continued price increases above inflation and rationality
4. Research libraries will continue to allocate and expend more annually for electronic access and resources as a percentage of the materials budget.

Question 2: What changes do you see on the horizon for large research library’s technical services operations?

Changes We Would Like to See in 5 Years
1. AcqBot
   a. acquisitions is labor intensive
   b. therefore, outsource acquisitions through approval plans
   c. intellectual analysis is done up front to create an approval plan
   d. then, use the ILS AcqBot to analyze bibliographic searches; ILL requests and electronic journal and index searches
   e. use the trends identified by this process to review the approval plan (human intervention)
   f. ILS is not doing this now. Have we asked?
2. Order Copy Records Online
   a. ILS should be smart enough to look for copy records based upon order records
   b. once you have received the book, the ILS should have already searched the utilities for copy
   c. if the book does not have copy, the ILS should move the provisional records into a file for human review
   d. what is left is the queue for original cataloging which should be the first time it is looked at by a human
3. Unified Catalog with a User-friendly Interface
   a. want a unified catalog and one search engine that does it all: books, multimedia formats, all of the indexes, e-journals, full-text articles, data sets, etc.
   b. create analytics for aggregate electronic resources held by Lexis-Nexis, EBSCO, UMI, etc.
      1. request that the bibliographic utilities or the publisher sell the records; such is the case with major microform sets
      2. this should also include automated bibliographic maintenance. A new title shows up in the aggregates, the new record is created and entered automatically into the database
   c. we want a web-based user interface for this
      - web-based interfaces increase user productivity
- with sidebars offering choices and options
- cluttered screens are ok (just look at CNN and others)
d. we want the search results de-duped
e. links and hotkeys would be available to broaden the search results, such as PubMed’s “Related Articles” links

**Question 3: How will organization, workflow and staff job skills change?**

**Why Review Technical Services?**
1. Change in General
   a. look how far we have come in the past five years
   b. rate of change is increasing
   c. we cannot stop: the job is in keeping up – anticipating what is coming
2. Why Review Tech Services Specifically?
   a. it is expensive
      1. backlogs are costly because it reduces access and availability
      2. cost of technology is high – machine life spans; internal physical networks; staff costs including training; OCLC and RLIN as utilities
      3. more competition from vendors and free-lancers who can supply services
      4. bottom line: can technical services managers beat the cost of the competition?
   b. it is basically invisible to most library users – they do not know how the book gets to the shelf, and do not care

**Staffing Issues**
1. Outsourcing and Insourcing
   a. we will outsource/inssource acquisition and cataloging as we have outsourced binding
      - specialized languages and subjects (Tibetan materials are an example)
   b. we will bring contract staff into the library and pair the insourcer with regular staff
2. Project Management is Growing
   a. there will be more project teams than in the past. It is easier to cost out a project than functions (cost accountability).
   b. feels good to do something from start to finish; however, it is not cost effective to use a $50,000 cataloger to do it all. It cannot compete with the vendors.
   c. also growing: use of student assistants to do some of the work
3. Technical Services Staff
   a. we need to apply economic models to technical services. We have to be competitive. Need to control costs, but not necessarily reduce costs.
   b. size of staff may be same, but the nature of duties change
      - more staff will get involved in the automated system
      - more staff involved in mounting electronic resources and checking URLs
      - more involved in bibliographic instruction
will actively become quality control people to review all of the work done by vendors and robots

4. Technical Services Managers
   a. Managers are no longer the experts. Staff jobs have become too specific and detailed.
   b. Managers must deal with big picture and details
      - project design
      - contract design and negotiations
      - delineate all of the details in order to make the big picture happen
      - managers must be able to communicate effectively internally and externally, especially with funding sources

Other Issues to Consider

1. Consortial Arrangements will Necessarily Increase
   a. no library can “go it alone” any longer
   b. for example, a consortium may analyze the backlog to identify what is common and unique and then divide the cataloging load among members
   c. consortia negotiations with vendors will increase
      - set up consortial agreements to get the aggregate records from utilities/vendors
   d. Technical Services should be involved in brokering agreements

2. Relationships With Vendors
   a. should pressure vendors to use standard OCLC MARC records
   b. help vendors develop products that will sell
      - we accept what the vendors have for sale -- we need to better identify what we want for products
      - for example, we are not pushing ILS to develop AcqBots
   b. we have to allow vendors to make a profit

**Question 4: How will these changes manifest in new space requirements? If you were planning a new facility, what would it contain?**

1. Staff Desktops
   a. staff should have an identifiable, individual workspace (if you even come into the office)
   b. voice systems replace typing
   c. the desktop automated system will incorporate voice and data
      - HDTV flat screen
      - smaller hardware footprint will result in more desktop space to handle more materials
   d. wireless communications will untether staff

2. Increase in Project Management Will Require Flexibility in Physical Workspace
   a. fewer walls
   b. shared and reusable working areas -- project teams can be assigned to a large area that can be reused later by other project teams