

TECHNICAL SERVICES REORGANIZATION AT THE UNIVERSITY OF ILLINOIS CHICAGO

CARLI ICAT/IACQ SPRING FORUM

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Focus of this presentation:

- Why is UIC restructuring technical services?
- How is UIC approaching the reorganization process?
- Summary recommendations

Signs signaling the need for reorganization:

- Workflows are starting to have too many “exception” routines
- Need to free up staff for new initiatives defined in the library’s strategic plan
 - Digitization projects (Example: Participation in the Google Project)
 - Non-MARC metadata creation (Example: Dublin Core records for inclusion in CONTENTdm)
 - Making “hidden” and/or unique local collections accessible
 - Requires significant investment in time and professional expertise for original cataloging
- To accommodate processing of e-resources!
 - More than 50% of the materials budget goes to purchasing e-resources while more than 80% of staff time is devoted to managing print resources.
 - Responsibility for managing the acquisition of e-resources and making associated bibliographic information available to patrons is spread over three departments and is less than 2 FTE total (out of a staff size of over 20 people).
 - Backlog of uncataloged e-resources is growing at alarming rates
 - Not unlike growth of print backlogs 20 years ago

How is UIC approaching the reorganization process?

- Began with an internal review and set of recommendations
- Brought in a consulting firm (R2) who did an “abbreviated” project
 - Why bring in consultants?
 - Good to get a 2d opinion from eyes outside the institution
 - Consultants are not influenced by internal politics and/or personalities
 - Consultants usually bring a broader perspective
 - Consultants have detailed knowledge of other products/services outside the institution’s normal vendors that could prove advantageous to investigate

- Consultants DO:
 - Assess your culture and workflows with fresh eyes
 - Remember: they can only make their recommendations based on what select staff say and/or show them!
 - Broaden your vision, options, and tool box
 - Provide a summary assessment that serves as an initial work plan
- Consultants DO NOT (usually):
 - Help you implement their recommendations
 - Come without their own set of biases (they are human too!)
- Established WECT (Workflow Efficiency Coordinating Team) to address R2 recommendations and lead reorganization efforts
 - REMEMBER: Someone still has to decide whether a “recommendation” from a consulting report is appropriate in your shop!

UIC's R2 Report

- UIC's R2 Report consists of:
 - 75 recommendations grouped into 7 categories:
 - *Strategy and Culture*
 - 12 recommendations related to how TS could:
 - better align with the library's strategic mission
 - address workplace cultural aspects
 - *Resource Description*
 - 6 recommendations that are very specific to changes to descriptive cataloging practices
 - *Collections Development*
 - 17 recommendations specifying changes in how materials are selected and ordered
 - *Print Monographs*
 - 13 recommendations to streamline the acquisition and processing of print monographs
 - *Print Serials*
 - 9 recommendations specifying reductions in activities associated with processing print serials
 - *Electronic Resources*
 - 7 recommendations specifying ways to increase staff support for working with e-resources
 - *Organizational Structure*
 - 11 recommendations specifying changes to reporting lines within the University Library to enable technical services changes outlined in the report

- WECT began by trying to id “low hanging fruit” (i.e., recommendations in all categories that could be implemented quickly). Examples include:
 - *Strategy and Culture*
 - None of these can be implemented quickly. Include such things as:
 - Develop a sustainable digitization strategy
 - Invest in “big picture” training
 - *Resource Description*
 - 2 out of 6 could be implemented quickly:
 - Accept duplicate call numbers and standard cutters
 - Accept DLC and PCC cataloging without editing
 - *Collections Development*
 - Prefer paperback bindings when available
 - While this sounded “quick and easy,” once investigated, we learned it would cost us more to get paperback in the long run, so we rejected it.
 - Stop buying print reference materials (unless only available in print)
 - *Print monographs*
 - Redefine PromptCat specs
 - *Print serials*
 - Reduce binding of print serials
 - Reduce efforts to locate missing issues; bind incomplete
 - Reduce efforts on unsolicited titles and issues
 - *Electronic resources*
 - Recognize e-resources as the mainstream of UIC’s content
 - *Organization structure*
 - None could be done quickly
 - Dependent on decisions made surrounding other recommendations
 - At some point, the focus needs to move on from decisions on workflow changes to decisions on “structural” changes

Where is UIC in the reorganization process today?

- Making decisions on some of the more controversial recommendations such as:
 - Centralized vs. decentralized technical services?
 - How will the management of e-resources be structured?
- Making site visits to other libraries in the area
 - Helps to see “bigger picture” issues
 - Helps to walk through actual workflows in different organizational structures
 - Helps people to brainstorm about might work best for us once we return home
- Hope to have a new structure and workflows in place by the end of summer

Summary:

- When should you consider reorganization:
 - Are you bursting at the seams with too much to do with too little staff?
 - Since new positions are not likely, an institution must
 - Redefine priorities as dictated by the strategic plan
 - New priorities result in new workflows
 - Are the “exceptions” to existing workflows growing?
- Will you need consultants?
 - Remember: Consultants don’t always come from consulting firms
 - Consider inviting someone from a larger place
 - Consider a colleague from a peer institution nearby who may have already implemented changes
 - Consider site visits!
 - Bottom line: Where might you be able to find another pair of eyes to help you assess your situation and recommend changes?
- Develop an implementation plan
 - Who will decide which recommendations to implement?
 - “Change workflows first and structure will follow” vs. “determine the new structure and redo the workflows accordingly.”
 - Remember: Consultants rarely help you implement their recommendations

Questions?

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