Plan for Library Technical Services Work Redesign

Kenyon College and Denison University
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Prepared by the Library Technical Services Work Redesign Task Force:

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Executive Summary

The libraries of Kenyon College and Denison University desire to provide the best possible services for our liberal arts undergraduates and faculty. We recognize that access to information and resources is created and maintained through our technical services functions and processes. To further our goals of improving these services, the colleges have joined in an effort to redesign the technical services workflows.

These workflow design changes profoundly affect how we will work. Not only will we work more closely together, but we will make best use of cooperative funds, collections, technologies, and services.   Our plan will take advantage of our strong, creative and productive staffs. Currently, each school has a separate division with parallel operations. After the plan is implemented, these operations will become one. Our plan applies dramatic efficiencies to 80% of what we purchase, streamlines receipt and delivery, and thus enables us to reallocate resources to enhance our collections so they better serve our users. Most important, this model empowers our technical services division to create new services and manage information in ways that set our colleges apart, enabling our users to fully realize the liberal arts in an age of electronic information.

Following are the critical points of the plan:

- A combined technical service team for the two libraries that will be on the leading edge of technology and user service
- Work processes that are combined to enhance efficiency and allow for more flexibility to address user needs
- A work process that is location independent and expandable

The central recommendations to achieve this plan are:

- A joint approval plan including combined selection, budget, and accounting for the two campuses
- Expedited delivery to ensure seamless user access of campus collections
- Replace paper with electronic flows wherever possible
- Increase the use of vendor provided services
- Concentrate our intellectual resources in areas that we cannot automate

Introduction

Our charge was to create a robust system[1] in which the focus is on constantly evolving patron information needs, research patterns, and desires. The system needed to be flexible, transferable, malleable, and adaptable. This charge was taken to heart by the task force, and here we present a plan that we feel meets this charge in full.

Our plan embraces a collaborative spirit beyond our two colleges. It builds upon the foundation of cooperation that already exists within the Five Colleges of Ohio and is supported by the strong pillars of statewide cooperation. While our redesigned processes focus on the operations at Kenyon and Denison, our vision for the future stretches well beyond these boundaries. Opportunities for further collaboration span all the way from cooperative selection of government document resources to our libraries emerging as role models for collaboration on a national level.

As we worked on creating this plan, we were guided by the input of our colleagues given during our open meetings. From this input, along with the guidance provided by the grant proposal, we created the vision and planning principles that follow.

Vision Statement of the Task Force

BE COURAGEOUS!

1. Act as a collaborative unit to best serve users at multiple locations.
2. Provide intellectual representation of collection as a whole.
3. Foster a culture of staff empowerment that effectively utilizes and rewards individual strengths.
4. Enable research and development capacity for entire organization.
5. Appreciate that as we combine our processes, there may be activities best implemented separately.

Planning Assumptions and Principles

We take the position that a mainstream of materials will be created and automated where possible. We also assume that it is feasible to provide 24 hour or less turnaround time in material movement between the two schools as well as between each school and CONStor, both for user access and for processing material flows.

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[1] According to The American heritage dictionary of the English language, 4th ed. (Boston: Houghton Mifflin, 2000) 1757. *System* is defined as "A group of interacting, interrelated, or interdependent elements forming a complex whole."

Our model:
- is designed with the needs of our users as a driving force.
- has the staffs from Denison and Kenyon working as one unit to accomplish shared goals thereby freeing up time to devote to managing other formats.
- builds on the strengths of our staffs in the technical services areas.
- takes advantage of technology innovatively and productively to streamline work.
- creates a combined collection that is greater than the individual collections.
- adjusts to changes as necessary and will be transferable.
- focuses on the typical processes within the whole system.
- hinges on staff participation and empowerment to succeed.
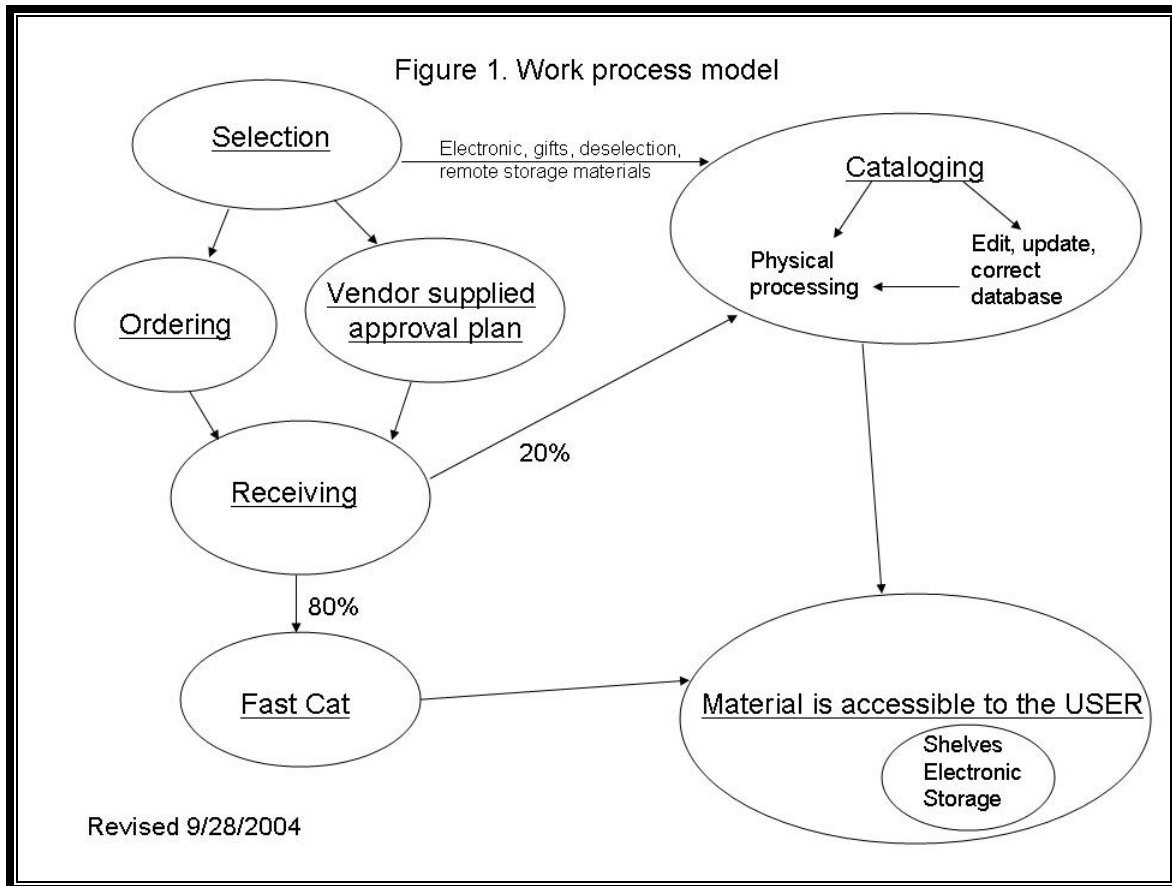
Staffing

Staffing for the work redesign plan will be critical to the success of the plan. While one of the goals of the Task Force was to think about processes and not personnel, in the end it is the people who will make the plan a success. The model is designed around work processes and does not delineate separate job descriptions. By focusing on the work flow and not the individual job, we hope to encourage staff to be creative and take initiative. We hope to instill an open-thinking mentality free of pre-conceptions or constraints, fostering new ideas and opportunities for our libraries and our staff. In this new environment the staff will be empowered to be proactive in anticipating changes in information delivery, access, and search mechanisms. Following are some general concepts for staffing:

- While employees will work for one college or the other, all staff members will be full participants in the combined unit and the team concept.
- Much conceptual and actual effort by each and every staff member needs to be given to the successful design and implementation of new workflows and shared responsibilities.
- Even for employees who continue with the same general area of process responsibilities (and perhaps particularly for these staff) it will be important to start fresh, from the beginning, to design the new work processes and for staff to see that they are going to do things differently. Our rallying call could be "I have a new job and it starts now."

Model

To meet our users' desire for both more electronic resources and faster delivery of all materials[2], we need to streamline our work. Our model reflects this need with a centralized workflow that handles 80% of materials in similar ways allowing us to gain efficiencies (Figure 1).

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[2] Our campus LibQual serveys and readings such as those found in the bibliography.

Figure 1. Work process model

Selection

Electronic, gifts, deselection, remote storage materials

Cataloging

Physical processing

Edit, update, correct database

Ordering

Vendor supplied approval plan

Receiving

20%

80%

Fast Cat

Material is accessible to the USER

Shelves Electronic Storage

Revised 9/28/2004

The work process has six components: I. selection which includes the vendor approval plan; II. ordering; III. receiving; IV. fast cat[3] for the majority of the print workflow; V. cataloging; and VI. making materials accessible for the user.

Although these stages may appear very broad at first glance, such a broad process model works to our advantage because it accommodates the diverse streams of materials we provide currently and in the future, and because it leaves room for our work to adapt to new circumstances.

We have identified four material streams:
- Print resources including print periodicals and government documents
- Electronic resources
- Audio/Visual resources
- Projects

Using the same workflows, large percentages of each stream may be acquired, processed and delivered to the user. Applying efficiencies to all of these streams enables us to dedicate more time to providing unique resources and services to our users.

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[3] Fast cat defined: simple copy cataloging and 5-10% review of vendor-supplied catalog records.

I. Selection:

Although formally outside the scope of our redesign, selection marks the beginning of the technical services process. Supporting and providing easier selection mechanisms will benefit both technical services and individual selectors. We, therefore, recommend a combined approval plan that provides for a majority of our print titles.

We will acquire new titles more efficiently, eliminating much time and effort in the selection process, after we complete the initial time-consuming set up of the combined approval plan. It is important to begin building the approval plan as soon as possible, since it will take considerable time to develop the combined profile and work through several editing and tweaking cycles. A successful approval plan will also lay a strong foundation for other cooperative collection development efforts. We recommend the following:

- Form a joint sub-committee from the two libraries
- Develop policies for managing the joint collection
- Work with vendor representatives to design a joint approval plan
- Design the approval plan covering broad subject areas and major publishers including but not limited to:
    - Assignment of physical location
    - As much material as possible ordered shelf-ready
    - Consistent, in-depth oversight of the profile to adjust for maximum benefit
- Review vendors for periodicals
- Review subscription lists for possible duplicate titles to discontinue at one location
- Create single fund structure which incorporates codes for each library

II. Ordering, III. Receiving, IV. Fast Cat

Ordering, receiving and fast cat are combined, allowing a large percentage of our material streams to undergo this part of the process without changing hands. They are three separate components but appear seamlessly linked for 80% of our materials. By applying technology wisely and following many of R2's recommendations, we can reduce distinctions among ordering, receiving, and fast cat. Labor saved by collapsing our linear processing of materials will give us more time to handle electronic resources and local materials, provide new services, and explore new projects.

Further, this part of the workflow emphasizes awareness of changes in vendor services and reinforces the link between the materials and the user. Vendor relationships take time to cultivate, and the publishing industry is ever-

changing and complex; we have designed this workflow to address such variability.

New workflow:
- Ordering/receiving/fast cat components of the process will all be done by a single unit for each material stream
- Reduce record manipulations and hand-offs as much as possible
- Develop policies and procedures for ordering and receiving
- Expand current vendor options and explore others
- Route exceptions to cataloging

Recommendations:
- Fully implement electronic ordering and invoicing
- Implement a direct interface with central accounting systems
- Increase the use of PromptCat and Marcive records
- Explore other vendor record options and implement where feasible

V. Cataloging

The cataloging component of the process will use knowledge and individual expertise to intercept, manipulate and provide access throughout the information life cycle of both digital and physical formats. We envision that this component of the process will maintain a project-driven workflow which will allow for the enhancement of core collections and systems. This marks a dramatic change from how we currently work. We thus anticipate needs for expertise in technologies such as XML, Dublin Core, relational databases, and web design. We anticipate partnering of this component with other library and computing units to facilitate access. Subject expertise and quality control will be reinforced in this model.

New workflow:
- Catalog unique, electronic, and local resources with a large portion coming directly from the selection component
- Perform quality control activities, catalog maintenance functions, and authority control
- Develop cataloging and catalog policies and procedures
- Process deselected and remote storage materials
- Apply research and development in the area of cataloging and the catalog
- Be involved in committees, focusing on both consortial systems integration and local campus information services

Recommendations:
- Implement a URL checking system

- Implement a process for quality control assessment of PromptCat records using a sampling technique

VI. Material is accessible to the user

In order for the concept of shared resources and staff to work successfully, delivery time of desired materials must be reduced to 24 hours or less, whether an item is shelved at Kenyon, Denison, or CONStor. This is key to user satisfaction and service. The access of materials will be a consideration in research and development as well as the use of the storage facility. It should be noted that expedited delivery has implications beyond the technical services unit and will involve the cooperation of the storage facility management and circulation staff.

Recommendations:
- Twice daily delivery service between Kenyon, Denison, and the Storage Facility for delivery of newly processed items as well as requested items
- Continued interaction with Ohio5 storage facilities committee to keep open the possibility of a facility that could accommodate technical services functions

<u>Illustrations of Implementation Options</u>

The hallmarks of our plan are: 1) conceptually our collection is a single combined collection, and 2) the new work design is location-independent. These two structural elements allow our new work to be flexible, expandable, and adaptable, giving it the greatest latitude possible for implementation. Because it is location-independent, this new work design can be carried out in a choice of environments, and we see our plan as being implemented in a variety of ways. Work is team-based, and designed in such a fashion that the teams can perform the work independent of any specific physical location.

To highlight its location independence, the following are possibilities for implementation:

Scenario 1: One option is that the new work plan can be done by teams residing at both libraries. This differs significantly from our present workflow, because currently we have parallel material streams flowing into each library and the same work process is being done independently at each library. In the new work design, materials would be combined into one stream, and each material stream would be located on a single campus, and carried out by a team. For example, all print resources as outlined in the model would be received and processed at one location, rather than two; likewise, all A/V materials would be received and processed at a single location. Materials designated to be housed at the other library would be sent via the expedited delivery service. The teams would be comprised of staff from both libraries who are interested in working with that

material type. Staff empowerment is paramount in our plan, and staff talents and expertise will be fully fostered in designing team staffing. The interaction of these teams with each other would be crucial to the overall system function. The streamlining of this process would free up time for projects, which could occur in any appropriate location. One example of such a project would be the digitization and global access of various slide libraries on our campuses.

Scenario 2: This same team structure could exist in a centralized facility; in this case, all teams would reside in one facility rather than separate facilities, but the team structure itself would be the same as described above. Print materials for both libraries would be received and processed centrally, and sent to the designated library via the expedited delivery service as illustrated above. With the design of the workflow, the centralized facility could be located on one of our campuses, at the remote storage facility, or at a centralized location. The location would not change the fundamental design of the work processes. A separate facility would include appropriate technological infrastructure to support team functions, allow for physical and virtual meeting space to build and enhance relationships with on-campus colleagues, and provide space for receipt and shipment of print materials.

In any scenario, the need for staff to be connected, cohesive, and collaborative will become a focus of management. Staff empowerment is paramount in our plan, and staff talents and expertise will be fully fostered in designing team staffing. The interaction of these teams with each other would be crucial to the overall system function. Meetings, training sessions and networking opportunities will reinforce ties with our users, our collections, our campuses and our colleagues. The new work environment will require emphasis on empowering staff to be engaged with their work and their colleagues.

Not only can this plan integrate more and new work in our two libraries, it is also designed to absorb the addition of other libraries in the future without changing the fundamental design of the work process. To illustrate this, let's imagine another college wishes to join in our combined collection. Through the mechanisms described in the plan, their approval plan, fund structures, and selection processes would be merged. Teams would grow with the addition of staff support as the workloads in each of the teams grew accordingly. Teams have been designed to expand, whether they are located across two campuses, in a central facility apart from our campuses, or elsewhere. Only a plan that is location-independent can support this type of future expansion.

Visions For The Future

The Library Work Redesign Task Force has created a plan that we hope will inspire, challenge, and encourage our users and staff. We expect it will be the solid foundation upon which we can build a broader and even more creative, exciting,

evolving, and expanding unit. As the plan is implemented and with its success, new concepts and ideas for further collaboration will develop.

We have designed a work process that is location-independent and portable. We can envision future possibilities and have purposefully designed a framework that will accommodate and facilitate other scenarios. For example in addition to location-independent work processes, this plan would also support location-independent staff. Continuing work, temporary staffing needs, and special projects are a few areas that might benefit from portable staff members. The concept of a location-independent, portable, adaptable and expandable staff would position us to respond to as yet unknown ideas and technologies – one of the most exciting charges and challenges of this work redesign.

Currently we have a rented off-site storage facility, but we will need a more permanent solution in the future. We envision a new facility as much more than remote storage; in fact, quite the contrary. It could be a dynamic and integrated facility for our campuses and users. Not only might it provide office space for our combined technical services operations, but perhaps a centralized location for the Five Colleges of Ohio staff as well. It might provide research space for library users who wish to do intensive on-site research with materials residing there. It might serve as a place for archival storage for university records, the CONSORT server, a centralized location for shared emergency preparedness, a book repair and preservation treatment center, and a space for consortium-wide meetings. It is possible that the mainstream of our newly acquired materials could be housed at this location and be available on-demand. With the delivery service we are recommending, such access would be seamless to the user.

Environmental scans and surveys reveal that our users desire one-stop shopping for information. We envision that our libraries will meet this goal with CONSORT being the crown jewel of our services. Our focus will shift to advances in technology. We can envision the development of a web portal that will allow users to search seamlessly across catalogs and databases. We can envision that CONSORT will be expanded, not just in numbers of records, but more importantly, in content. For example, one such enhancement could be direct catalog links to digital formats of A-V materials, such as music and multimedia. We can envision that our faculty and students will look at our libraries not only as avenues to information, but also as a key component in the long-term preservation of and access to their own intellectual property.

There is so much that we don't know, but experience has taught us that we should plan for change and it will surely come! We want to stay ahead of the game. We want to be on the leading edge of technology. We want to provide our users with the best resources and support to meet their needs. There will be new, different, creative, challenging things to do and we want to be in a position to do them. The

unknown is a difficult thing to plan for; however, this is what we are aiming for - a plan that recognizes that change is inevitable and positions us to welcome it.

Our vision reaches past what we can see; the world of information technology is dynamic and full of unrealized promise. One of the strengths of our plan is in its deliberate design and mission to be adaptive, flexible, malleable, and transferable. In short, the plan is designed to and expected to change and grow -- and we hope it does!

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<u>Appendix</u>

Executive Summary from R2 Consulting
Library Workflow Analysis — Denison and Kenyon
Prepared by Rick Lugg and Ruth Fisher
May 2, 2004

In April 2004, R2 Consulting performed a technical services workflow analysis on behalf of the libraries at Kenyon and Denison. R2's analysis and recommendations compared the respective workflows from selection to access, and explored the potential for combining the two operations. The context: Could collaboration between technical services staffs lead the way to a broader vision of "two colleges sharing a single collection", increased access to full-text electronic resources, and an overall re-invention of library processes focused on new tools for patron access? The R2 inquiry comprised one element of a Mellon funded project which will continue for another year.

R2 identified many similarities between the two workflows, and proposed recommendations to further standardize them, and to streamline and automate greater portions of both workflows. R2 believes that its workflow-specific recommendations can significantly improve technical services productivity, and free time needed to pursue new initiatives. In addition, these workflow-specific changes lay the groundwork for more far-reaching changes.

Among the most important workflow-specific recommendations are:
- Implementation of electronic invoicing between key vendors and the libraries
- Implementation of an accounting interface between the libraries and college accounting systems
- Increased use of electronic selection and notification tools provided by vendors, including e-mail notification to faculty members of relevant new books and journal issues
- Reduction of pre-order searching, with duplication controlled by the library's automated system
- Elimination of parallel tracking systems that duplicate information in the system
- Increased use of approval plans for obtaining relevant new titles
- Designation of either Kenyon or Denison as the library of record for any duplicated periodicals titles; elimination of binding that title at the other library
- Increased use of outsourced copy cataloging (OCLC PromptCat)

R2 also concludes that these changes, while necessary, are not sufficient to achieve the grander vision set forth by the Library Directors. Additional changes

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are needed that extend beyond Technical Services. This additional set of recommendations is based on a set of business principles that include these concepts:

- Incorporate "systems thinking"
- Simplify and standardize requirements (minimize local practice)
- Create a mainstream
- Automate the mainstream

R2's additional recommendations are as follows:

- **Implement a morning & afternoon courier service:** In order for a single collection to satisfy both of its supporting institutions, delivery time of desired materials must be drastically reduced—to 24 hours or less--whether an item is shelved at Kenyon, Denison, or CONSTOR. This recommendation underpins all of the others, and is the key to satisfactory patron service.
- **Implement a single combined materials budget:** By building a single $1.7 million materials budget from separate ones of $900,000 and $800,000, a much larger mainstream is created. By consolidating purchases from that larger budget with an agreed set of vendors, there are fewer vendors to deal with, larger, fewer systems to learn, more items in each batch export, more lines per invoice, possibly better terms with suppliers, more transactions that act alike, less duplication and more unique titles.
- **A single combined fund structure:** This would reduce the number of fund codes to be assigned and tracked; would increase the amount of money in each subject fund; would re-orient selector thinking about the collection; would simplify procedures and reduce errors.
- **A single set of collection development assignments:** Again, economies of scale would apply, allowing a single selector to manage a subject collection across both institutions. Titles within a discipline would be considered once rather than twice. The number of slips or electronic surrogates would be cut in half.
- **A single approval plan:** It requires at least $300,000 annual expenditures for a broad-based approval plan to work well. Neither institution can afford a full-scale plan on its own, but the combined budgets make this a reasonable option. After the initial work of building the profile, approval plans can be an efficient method for acquiring new titles, eliminating the need to monitor publisher catalogs, reducing the number of slips to review and the number of orders created.
- **A single list of subscriptions:** Both libraries now subscribe to approximately 1,200 print titles each. As with books, these lists could be combined, resulting in a single list of perhaps 1,800-2000 titles. This would allow consolidation with a single agent, and standardization of procedures and training—and would save the cost of duplicate subscriptions.
- **Little to no duplication of content:** If this is really two institutions sharing a single collection, it makes sense to limit duplication to the absolute minimum, relying on rapid delivery to satisfy patron requests. This could

result in additional use of resources, and would permit purchase of more unique items with the money saved on duplicates.

- **Centralized technical services**: Although this recommendation is not essential, it should be considered once some of these other tasks have been completed. Centralization would allow consolidation of many tasks, such as ordering, receiving, cataloging, and serials check-in. It will enable those tasks to benefit from automation, greater batch sizes, and reduced hours on task because of greater familiarity with procedures. It can be especially helpful with physical processing.

Both sets of recommendations contribute to the same goal. By reducing the amount of time and effort on existing processes, staff time can be freed to expand access to electronic resources, create records for unique and locally produced content, to improve liaison relationships with faculty. These efforts will enable the libraries at Kenyon and Denison to better understand emerging user needs, and to build the services that meet them.