



Sacramento Public Library Authority

July 23, 2009

Agenda Item 6.0: Reorganization of Collection Management Services Department

TO: Sacramento Public Library Authority Board Members

FROM: Alison Landers, Deputy Director – Public Services

RE: Reorganization of Collection Management Services Department

RECOMMENDED ACTION(S):

1. **Approve** the reorganization of the Collection Management Services department by dividing responsibilities according to the functional areas of Selection/Acquisitions and Cataloging/Processing. No additional staff is required to implement this plan.
2. **Acknowledge** the steps that have been taken to implement tasks a through k of Assessment Item #271.

REASON FOR RECOMMENDATION

The Collection Management Services department (CMS) has two primary functions: 1) selecting, ordering, and receiving materials; and 2) cataloging and processing materials. Within those primary functional areas are various tasks and responsibilities related to developing collections of print and electronic materials, as well as ensuring that materials are accessible to customers in hand or electronically.

Within the Library's Internal Assessment approved by the Authority Board in January, 2009, Assessment Item #271 contained a set of tasks relating to the CMS department. There were also other projects related to continuous improvement of the materials collection, improved access to information and materials, and accuracy of the materials database. In order to most efficiently address all of these tasks, these additional projects will be included in the overall strategy planned to address the tasks identified in #271.

After substantive review of CMS and its activities, identifying major projects that are current and ongoing as well as the new ones for FY 2009/10, the department is being partitioned into the two major functional areas mentioned earlier: 1) selecting, ordering, and receiving materials; and 2) cataloging and processing materials.

The Selection/Acquisitions manager will:

- oversee the selection process—revise and update procedures
- develop a training plan for selectors
- monitor the weeding program
- evaluate and revise (if needed) the core reference plan



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- develop and implement a plan to inventory library collections
- work with vendors and staff to implement the Opening Day Collection plans for Valley Hi-North Laguna, North Natomas and the Robbie Waters Pocket-Greenhaven branches (271 b)
- work with the Finance Department, vendors and staff to develop and implement a plan that ensures integration of the two financial systems, one for materials acquisition and Eden.
- Implement LINK+ changes – lending media, workflow and workroom design.

The Cataloging/Processing manager will:

- analyze and streamline the work flow to improve receiving functions and to speed the average processing time for materials (271c)
- develop (and/or review and revise) productivity standards for the functions in cataloging and processing (271d)
- reconfigure the work spaces/work flow (271e)
- increase the use of vendors who provide materials, subjects and formats in shelf-ready condition (271a).

A number of steps have already been taken resulting in improvements in workflow and shortening the length of time from the receipt of materials to those materials being available to customers. These have included:

1. Using available temporary catalogers to assist in reducing the backlog;
2. Applying for and receiving funding for SETA workers to assist with processing materials (summer 2009);
3. Simplification of the processing steps for media;
4. Elimination of tasks that are a duplication of effort or that slow down the processing of materials, such as placing one barcode in each book (not two) and removing the electronic option for customers to suggest a title. (Most of these customer suggestions were items already on order and this service alone took almost a full time staff person.)
5. Cross-training staff to ensure that any available time is used for materials processing;
6. Streamlining the mechanics of getting processed items into delivery for branches—done with the assistance of General Services.

OVERVIEW OF ASSESSMENT ITEM #271

Following is a status update on each of the discrete items listed in Assessment Item 271:

271. Develop a comprehensive review of the Collection Management department in order to improve productivity and efficiency by:



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- a. Performing a cost benefit analysis of utilizing a vendor to process, catalog, provide shelf ready materials and drop ship materials (PA 5-5; Rokke, Welsch, McPike, Nelson - June 2009);

Completed Tasks: vendor cataloging and processing of materials to shelf-ready status is in place with two vendors, and in development with a third.

Next Steps: Continue to increase the number of vendors that provide cataloging and processing services, and perform a cost-benefit analysis of drop shipping materials directly to branches.

- b. Contracting with a vendor to provide opening day collections for new branch libraries (Rokke, Dentan, Freeman - July 2009);

Completed Tasks: The RFP's for opening day collections resulted in signed contracts for the materials that ensure balanced collections tailored to the individual communities and the timely receipt of the materials for the new libraries: Valley Hi-North Laguna (initial delivery date 7/21), North Natomas and the Robbie Waters Pocket-Greenhaven Branches.

Next Steps: Continue to work with the vendor to implement the remaining contracts, oversee selection, and establish delivery dates.

- c. Analyzing and streamlining the work flow to improve ordering and receiving functions and to speed the average "received to ship" time for materials (Rokke, Noblet, Welsch - Mar 2009);

Completed Tasks: While a comprehensive review was not completed, improvements were implemented to improve ordering of materials. Staff is working with vendors to have them process materials such as media, adult fiction and children's materials to shelf-ready status. This was mentioned in 271a.

Next Steps: The managers overseeing the two functional sections of the department will initiate a comprehensive review of ordering, receiving, cataloging and processing - the workflow and logistics. In addition, the layout of the department's physical space will be analyzed to improve workflow and ensure there is minimal duplication of work and effort. Once the analysis is complete, a plan for reorganization will be developed and implemented.



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- d. Measuring employee productivity (PA 5-5; Rokke, Newton, Noblet, Welsch - June 2009);

Completed Tasks: An initial review of productivity standards was undertaken, and catalogers' output has been measured against these standards. Two of the primary supervisors on this team, Kathy Noblet and Lee Welsch, have retired. The new structure for the department means that a different team will take a fresh look at this item, led by two managers, Rokke and Biddle.

Next steps: Review internal productivity standards for all positions in the department; measure staff output; gather data from other libraries if available and use to review internal standards and output.

- e. Studying the return on investment of redesigning the department to improve workflow and productivity (Rokke, Facilities - Feb 2009);

Completed Tasks: A superficial review was completed based on recommendations in a study of the Collection Management Department performed by a consultant in 2004. Many of the recommendations have already been implemented, with the exception of the complete redesign of the department's physical space.

Next Steps: The redesign of the space will move forward with the managers overseeing the new layout in the department. See #271c.

- f. Increasing the number of vendors with whom the Library places orders and receives bibliographic and order records electronically, thus decreasing the number of hand-entered orders each month by at least 25% (Rokke, Selectors, Nelson, Noblet - April 2009);

Completed Tasks: All the major vendors the library uses have the ability to receive electronic orders and return bibliographic and order records. To date, all children's print material selectors, all media selectors, and the adult fiction selectors have been trained in creating electronic selections, greatly reducing the time spent on downloading individual records and keying individual orders.

Next Steps: Remaining and new selectors will be trained to actively use online selection tools whenever possible.

- g. Exploring the feasibility of electronic invoicing with large vendors to reduce the labor intensive practice of keying invoices (Rokke, Noblet, CMS staff (receivers), Nelson - April 2009);



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Completed Tasks: Upon exploration of how electronic invoicing works and the benefits in terms of time-savings, staff determined to move ahead with this change. The first vendor trial did not work because the system used by the Library for electronic communication between vendors and acquisitions is an older version that does not include electronic invoicing. Adding that capability required an upgrade to the software, which was completed and tested at the end of June.

Since the upgrade has been completed, one staff member began working with electronic invoicing the week of 6/22 to test the process. Other staff will be brought on in July 2009.

Next Steps: Complete the implementation of electronic invoicing.

- h. Discontinuing the practice of putting gift tags in gift books and offering less labor intensive options to branches (Rokke, Welsch - Jan 2009);

This item was completed in January, 2009 resulting in labor savings as expected.

- i. Eliminating the use of dual barcodes to save processing time (Rokke, Welsch - Feb 2009);

This item was completed in January, 2009 resulting in labor savings as expected.

- j. Exploring the use of receipt printers to reduce processing check-in time (Rokke, Welsch - Mar 2009); and

This item was completed by March, 2009 and reported to the Board in April. Receipt printers were installed and the expected labor savings resulted.

- k. Exploring the use of an "on call" task force to assist in reducing the backlog of materials (Rokke, Public Services Managers - Mar 2009).

Completed Tasks: On-call staff has been hired to work on both the cataloging and processing backlogs. The backlog has been reduced.

Next Steps: The on call librarians will continue to work on the cataloging for the next three months. Funds are limited, and it is doubtful that funds will be available to allow additional time, although need has not been fully determined.

On call staff is processing materials 19 hours per week and a SETA worker is processing 32 hours per week for six weeks (not paid for by the Library).

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