



ART LIBRARIES SOCIETY OF NORTH AMERICA

35th Annual Conference
Sheraton Colony Square, Atlanta, Georgia, April 26-May 1

Going Outside, Coming Back for More: Outsourcing, Moonlighting and Consulting
April 28, 2007, 9-10:30 am

Moderator: Lily Pregill, Project Coordinator, Frick Art Reference Library

Speakers:

Carol K. Rusk, Benjamin and Irma Weiss Librarian, Whitney Museum of American Art

Eric M. Wolf, Director of the Library, New York School of Interior Design

Margot Keuper, Vice-President, Duncan Systems Specialists, Inc.

Recorder: Lana Bittman, Assistant Librarian/Cataloguer, Whitney Museum of American Art

I. Opening remarks – Lily Pregill

Lily, no stranger to the world of consulting and moonlighting, is filling in for Debbie Kempe as moderator.

II. Carol Rusk: “Liberating the Library: Creative Solutions to Shrinking Budgets and Human Resources”

Carol discussed the status of the Whitney Library and how severe staff cuts encouraged her to rely on volunteers and a steady stream of interns, enabling her to stay within confines of the budget. This allowed for documentation of buried treasures in the collection. Collection assessment was necessary; rare and valuable materials in the general stacks and on open shelves were moved to special collections and re-housed, and the catalog was updated. After talking with HR, Carol discovered a “professional fees” line in the budget that she could use to hire consultants. She initially hired moonlighting catalogers to tackle the backlog. Interns and volunteers take time and much training and retraining, but are ultimately rewarding. Volunteers’ initial responsibilities involved filing reams of ephemeral materials that arrive from Whitney staff offices. Several projects emerged from this, including: Special Collection artist file, Poster Collection, Pamphlet Collection cataloging project, and archival work such as: archives database, photograph collection, and processing film and video files. Volunteers and interns also help with preservation projects, such as reformatting the audio collection, preservation re-housing, and a stack shift in Special Collections. Although there have been occasional incidents such as bored, confused interns and volunteers who like to socialize (and in some instances, hum a

lot!), the work of temporary staff has been positive. In conclusion, Carol identified the collection, got adjuncts to help, and ultimately saw progress and accomplishments. Budget and staff cuts require new methods to maintain library operations, and creative and aggressive ways to achieve results, and in the end, obscure materials became available for research.

III. Eric Wolf: "Gallery Hopping: Professional Growth through Consulting"

Eric discussed the benefits of consulting outside one's day job, which include the opportunity to expand one's skills via professional development, a chance to keep abreast of what other institutions are doing and learn how they work, a way to raise profile and expand your resume, gain experience with senior management, develop an entrepreneurial outlook, prepare skills beneficial upon retirement, and supplement income. Word of mouth is the way to go, since finding clients can be difficult. Eric's first consulting job was organizing the Blumka Gallery in New York, which holds 4,000 titles. The librarian knew he was interested in consulting, made a referral, and he met with gallery operator. Then, over a year ago, Sotheby's was seeking accreditation, and a member at his current job referred him for the post. Eric established an invisible network.

It may be difficult for non-profit types to get used to the corporate, private sector, but there are many benefits, such as all expense paid trips, fun excursions, cultural options and martini lunches. Discussion of compensation is difficult, especially when the client's budget is unknown, and Eric said one has to decide whether to charge for hourly billing, establish a project based (fixed fee), or a combination of both. Non-profit types tend to sell themselves short. Eric charged less the first time he consulted than the second, and he will charge more next time. The art of self-representation is confidence-building, and negotiation with senior managers is a transferable skill. Also, business writing skills are important for strategic planning and project management, and Eric explained how it's rewarding to see plans immediately adopted and implemented. Eric offered to share his proposals for Sotheby's and Blumka Gallery. He suggested determining what the client expects to achieve and also what they pay for human time before writing a proposal. They are unsure what goes in to library planning, which is why they are hiring a consultant in the first place, so as a consultant, one needs to work with them and rank priorities. The rewards of consulting work include shaping and expanding libraries from the start, helping clients find staff to run new library, and extra income.

IV. Margot Keuper: "Outsourcing Solutions since 1990 – a Vendor's Perspective"

Margot began her talk by discussing the history of UTLAS International. UTLAS was at the forefront of MARC development, database conversion and authority control in the 1980s. CATSS Services was devoted to retrospective cataloging projects, and during the database building frenzy it was a 24 hour-operation with two 8-hour shifts working on RECON projects. UTLAS

shut down CATSS by 1990, but Japanese projects/contracts needed to be completed. Margot was hired by UTLAS to finish these (150,000 records); Margot and Al set up Duncan Systems Specialists, Inc. with a staff of 3. DSS has always been an entrepreneurial, customer-oriented library tech. services outsourcing business. RECON was the mainstay of business for the first ten years. They branched to IT outsourcing in 1994, and formed an alliance with National Book Service (NBS). DSS staff is onsite at NBS. Today, IT management accounts for 20% annual revenue. Libraries started to consider outsourcing around 2000, but there were still large conversion projects completed by DDS. DSS is an employer of 22 full-time staff with Margot and Al as management. There haven't been layoffs in 17 years, and work is a streamlined process – manual intervention is limited whenever possible. 75,000 MARC records are produced a month and staff is used for the intellectual effort.

Profiling forms the basis for a customized, well-considered project. Investing time and sampling gives library staff and vendor a feel for the project. DDS samples 2-3% of titles, and offer free hit retesting against OPUS database. Margot and her staff generally don't conduct site visits, but sometimes they are necessary, and would have been beneficial in 1993/4 with the case of the Canadian Museum for Civilization/Canadian War Museum, which involved monthly trips to Ottawa to re-label books from Cutter to LC classification. The project involved a small working space, limited bookshelves, and space-saving shelves with limited stack access, which would have been too good to know prior.

Project throughput is based on the number of units produced per person in given amount of time (usually calculated by the hour). Throughput provides a way to know if project is priced properly and if it will be profitable. Some projects done by machine only – the more automated, the higher throughput expectations. RECON is often a "nickel and dime" proposition, and libraries expect a flat rate. Pricing for RECON involves: the form of source documents, completeness and reliability of information on source documents, whether or not the collection has been weeded or inventoried, whether source documents have barcodes, the percentage of non-book materials, non-English and non-Roman alphabets, percentage of special collections, special editing requirements (i.e. AACR2 upgrade), and the complexity of local holdings. Pricing can be complicated, but many prices have been flat for past ten years. The internet and remote access changed the nature of work, and Margot no longer has to be on site for shelf-listing. Digital images rather than faxes are used for "no hits," and can now connect directly to database for exporting and importing of data. DDS has long-term, established relationships with library customers, and there is a high comfort level (i.e.: the Watson library began working with them in 1992 and is still a client today). Projects are never outsourced to other vendors, and customers know their work is being done in a single, controlled environment, only by DSS staff. If work cannot be done on premises (authority control or binding), the customer always knows who is involved.

V. Q & A

Q: Carol, is the work of interns formally handled by paid staff, and do they work on strictly new projects [or are they ongoing]?

A: Both types of projects are done.

Q: Eric, how do you manage your day job and consulting work?

A. Vacation days

Q: Is your relationship with your day job affected when they find out [about your consulting work]?

A: I tend to think it reflects well on the library and institutions doing work with Sotheby's and the gallery. Also, it enables me to negotiate deals and fosters interconnectivity, such as opening the Frick Library for Sotheby's Institute students. Also, there are nights and weekends and I get decent vacation time.

Q: Does it help negotiate your salary?

A: I think about it. I'm building connections, and they take you more seriously, which makes your value go up.

Q: Carol to Margot: What is the smallest RECON projects you take?

A: RECON is less than 20% of business. Some clients send 100 books a month. There are extremes of small projects to large volumes – it depends, but nothing is too small or too large.

Q: Margot, what's the trend now? What's your sense of the future of outsourcing?

A: Current acquisitions and new materials. Wholesalers expect to provide books shelf-ready with MARC records; Monographs outsourced to vendor; Increased warehouse space, since physical processing take a lot of time

Q: Is language expertise required?

A: Yes, most staff know 3 languages. There is a demand for CJK, Hebrew, Arabic, and Slavic languages too. We can't take small number of Arabic or Japanese because it doesn't make money.

Q: Margot, is your staff physically with you?

A: Yes.

Q: (Lily to Carol) Are relationships established with local library programs?

A: Yes, we send intern requests to local library schools.

Q: (Rodica Preda to Margot) Praise and thank you for good work done for the Frick. Also, do you use other schemas besides USMARC?

A: We're customer driven – there hasn't been a demand, but we can do it.

Q: Carol, your administration sees your creative way of dealing with library. Does that reflect their feeling that you can do all the work with restraints?

A: You make a choice with what you can do with your life. They can't see what we've done until we take it to the next level. The current Development staff is fascinated with projects, but the library is invisible.

Q: Carol, when you argue for staff promotions and increased staff, what are the carrots you dangle to your admin? Such as, we've done this but can do twice as more with a larger staff?

A: They think it's wonderful but they focus on other Museum aspects, such as porters, art handlers, library fellows group, etc. Maybe I'm too patient.

Q: What would the tipping point be?

A: I want to say the library is used more than ever, and the future holds ongoing projects, a greater website presence, library awareness, and a technology taskforce.