Like their colleagues in public services, technical services employees must continually adapt and evolve to keep pace with changes—often driven by technology—that push at the library from all directions. The most visible changes are naturally those demanded by patrons, but the changes to the "back end" may often have the greatest impact.

The Cariboo Regional District Library (CRDL) is a midsized public library system consisting of fifteen branches covering a rural landscape roughly the same size as the state of Indiana. The headquarters and main branch share office space with the local government, the Cariboo Regional District, and are located in Williams Lake, British Columbia. Relatively isolated from the engine of the province, Williams Lake is a seven-hour drive northeast from Vancouver. With a service population area of 70,000, this region is one of the most sparsely populated in the province. All communities, however, regardless of their size, deserve the best that a library has to offer, especially those with limited access to information simply because of their location. To give an indication of the level of isolation, it is worth noting that at the time of this writing, a handful of the branches were still without high-speed Internet access (the story of Internet connectivity at the Cariboo Regional District Library is another story altogether).

The Technical Services Department at this library is much like that at others, albeit on a smaller scale; workflows are regularly assessed, cataloging output is monitored, and technological challenges occur frequently.
Structure and Function

The department currently consists of 4.12 full-time employees (FTEs). Working relationships at CRDL are close and with limited overlap, in a small workspace. From the library's inception in 1994, cataloging has been performed by library technicians, of whom there are currently two FTEs. There is a single full-time acquisitions clerk, a .60 FTE processing clerk, and recently an ILL clerk at .60 FTE has been added.

Reduced cataloging output led to the recent creation of an interlibrary loan (ILL) clerk position. Prior to this, ILL duties were shared by the cataloging staff on a rotating basis. One cataloger would perform ILL duties in the afternoon, while the other would catalog new and added items. Each month they would trade duties, in an effort to build some redundancy into the system. Under this formula, followed for years, slowdowns in cataloging productivity were routinely addressed by reducing the time allotted to ILL duties, in smaller and smaller increments. This approach, while satisfying immediate cataloging requirements, was clearly unworkable in the long term. Confined to the afternoon in order to limit their extent—it was believed that if ILL duties were undertaken in the morning they could potentially consume the greater part of the day—ILL duties began to creep backward to meet the increasing demand, further reducing cataloging output.

On average, cataloging output was 1,100–1,300 pieces per month, and significantly less when a cataloger was absent (600–800). With only 1.5 FTE catalogers (ILL was .5), an absence would reduce the number not by half, but by two-thirds, as ILL duties would still be assigned for the required half day and cataloging for the remaining half (see figure 7.1).

![Figure 7.1. CRDL Technical Services Staffing.](image)

It can be seen that with a large number of planned and unplanned absences in the form of conferences, illnesses, and vacations, additions would slow to a trickle (it is worth noting that between them the cataloging staff members have
over fifty available annual vacation days). In 2004 the department saw three bereavement leaves in a three-month period, bracketed on both sides by conferences and vacations. The already shaky system soon began to show signs of breaking.

**Trouble in the Wilderness**

In the fall of that same year, branches began with increasing frequency to note the limited volume of materials being received. Statistical reports confirmed the slowdown, but did not provide any solutions.

Staff and management met repeatedly during the early days of the crisis in an effort to identify the roots of the problem and apply a solution. Soliciting input from staff on organizational and traditionally "managerial" topics has improved morale in the department, creating a safe environment in which staff members are increasingly comfortable expressing their views and proposing new ideas. Many of the improvements explored here have their origins in staff suggestions, not those of management. Although difficult to quantify, the resulting improvement to morale has undoubtedly had an effect on workplace efficiency.

Months before output had begun to slow down, a decade’s worth of statistical data had been converted to a digital format. Prior to this initiative, all statistics had been recorded on paper. The digitized data revealed some key trends that proved critical to solving the crisis. Chief among these was the marked decline in cataloging output, the steady rise of the materials budget (with more funds, there are more items to catalog), and a doubling of interlibrary loan traffic over a five-year period. As noted, previous attempts to increase additions by limiting ILL duties had been unsuccessful. Until now, no one had considered the problem of trying to shoe-horn twice the workload into a reduced time frame.

![Cataloging Additions, 1996–2005](image.png)
The high point in figure 7.2, 17,000 pieces reported for 1996, occurred with the addition of a third cataloguer. From 1997 onward the cataloging department was composed of two catalogers working the discussed CAT/ILL split.

The budget, although dynamic, has experienced an overall increase over the same time period (see figure 7.3). With few exceptions, cataloging output has followed a similar path to that of the materials budget. In 2000 the library lent 722 items. Five years later that number stood at 1,570. (See figure 7.4.) Although lending has doubled, it is worth noting that borrowing traffic has also significantly increased.

Figure 7.3. Materials Budgets, 1996–2006.

Figure 7.4. ILL Traffic, 2000–2006.
Multiple Answers

It must be noted that the statistics were not the only evidence of productivity problems; one need only observe and converse with staff members for that. The statistics became evidence for the justification of a new position, one that, due to budget limitations, was still over a year away. In the meantime, many smaller measures were discussed and implemented, in the hopes that collectively they would alleviate some of the problems. Even without the addition of a new staff member, these temporary solutions proved to be remarkably effective, and included the following:

- **Scanner reconfiguration:** Traditionally technical services staff searched for titles—either in receiving or in cataloging—via title or author keyword browsing. Bar code scanners at each station were configured to allow for ISBN scanning, allowing for a much quicker search process.

- **Reduced processing:** Following a growing trend at many libraries, the pocket label that had been printed and placed in the inside cover was eliminated. As it is the catalogers who print and place labels, fewer labels meant less time labeling and more time cataloging, as well as a reduction in label expenses.

- **New bibliographic utility:** The current ILS at CRDL prevents the use of Z39.50 inside the application. With the dissolution of LaserQuest, the library purchased BookWhere, a Web-based Z39.50 client, at a tenth of the cost. In addition, the new product allows for the retrieval of a substantial number of VHS/DVD records. LaserQuest was notably weak in this area.

- **Added copies:** In the past these copies were identified and added by cataloging staff. The acquisitions clerk, previously limited to ordering and receiving new materials, now identifies and inserts added copies into the ILS upon receipt. Unlike cataloging, the library’s Acquisition Department experiences considerable fluctuations throughout the year. Incorporating additional duties into this position was a simple process. Of all the quick fixes, this initiative has had the greatest impact on productivity and is perhaps the most far reaching. Branches identify which copies are duplicates and mark their orders accordingly before submitting them to acquisitions. And as every item passes through the clerk’s hands, this individual also makes note of duplicates. The ordering records are marked in the ILS to allow for quick identification upon receipt. Some titles are bound to be missed, but last year added copies inserted into the database this way accounted for 11 percent of total cataloging output.
The department also applied and then retracted other solutions that were deemed ineffective:

- **Outsourcing:** A brief analysis revealed outsourcing to be of limited value even when confined to a specific format, such as DVDs. It was not the most cost-effective solution, nor would it contribute anything to staff morale.

- **Classification Web:** Technologically, the members of the department are late adapters. The CRDL experiment with Classification Web experienced many of the negative results of Ferris's study, wherein lack of training and technological aptitude hindered success (2006, 132).

The changes listed above eliminated much of the existing backlog and prevented a new one from developing. At the same time, they allowed the department to illustrate that numerous approaches were being pursued, while simultaneously lobbying for a budget increase and the creation of a new position dedicated to ILL processing. After adopting the solutions, cataloging additions increased by 30 percent in the following year, and as a result cataloging levels have surpassed the high point of 1996, when there were three full-time catalogers. Figure 7.5 shows the resultant spike in additions in the 2005–2006 year.

![Cataloging Additions 1996–2006](image)

These successes did not eliminate the need for a new position. ILL traffic shows no sign of diminishing. In fact, early numbers for the 2007 year showed the increase continuing at the same rate. Nor would the library consider any
attempts to decrease this service—as one of its provincial operating grants is directly linked to ILL volume. Moreover, with only two catalogers, the problems associated with absences, planned or otherwise, are likely to return. Increased specialization has substantially improved efficiency in the department. Since the ILL position has been created, however, successes in the cataloging department have led to difficulties in another.

**Processing**

As the number of additions significantly improved, the increased flow of materials created strains in processing. The processing clerk retired, and the learning curve associated with the new employee prompted the department to consider a new round of small “solutions.” Among them was the assignment of spine labeling to catalogers and, more important, the assignment of bar code application to the acquisitions clerk. These changes are best illustrated by the examination of both past and present workflows in the Technical Services Department.

**Workflows**

In the past, processing at the library was a two-stage process. Upon arrival, new items would first be received and then placed in a queue for processing, only to be returned to processing a few days or weeks later. Figure 7.6 (p. 92) traces the original path.

Here, the new materials traveled from the receiving table (A) to the acquisitions clerk (B) and the preprocessing shelves (C), where they were removed by the processing clerk at (D) for security strips, jackets, stamps, pockets, and bar codes. After preprocessing, items were placed in the queue to be cataloged at (E). The catalogers (F) then created/copied records as required before returning the materials to the final processing shelves (G), where the clerk (H) applied covering labels and mack-tack, before shipping the materials to the branches (I).

Visualized, it was a confusing and convoluted knot that created a feedback loop (from B to E). That loop added to the general “noise” of the system by creating undue pressure on the processing clerk. In this scenario, the clerk would have to monitor two input streams—those items ready for preprocessing and those ready for final processing—continually assessing which was most important. With the acquisitions clerk now applying bar codes upon receipt, the remaining processing is transferred to the final (now single) stage of the processing circuit. This effort also resulted in some supply cost reductions, as a bar code cover was no longer necessary when the bar codes were applied prior to the book jackets.
The revised path shown in figure 7.7 is straightforward even at a casual glance, illustrating the simplicity of a system in which the only pressure is the steady influx of materials and their movement from one end to another. Here new items move from the receiving table (A) to the acquisitions clerk (B), who
receives, attaches a bar code, and then adds them to the cataloging queue (C). After creating or copying records the catalogers (D) then bring the items forward to the processing shelves (E), where they are retrieved by the processing clerk (F) for security strips, jackets, and stamps before being shipped to the branches (G).

Figure 7.7. New Workflow.
The Future

As a cohesive whole, these improvements have now been in place since January 2007. In that time the department has seen two retirements and gained three new employees (including the ILL clerk) in processing and acquisitions. During this transition period, additions are still at optimum levels, averaging 1,500–1750 pieces per month. The system appears to be working, yet the future will likely contain new obstacles and necessitate new improvements. Currently under consideration are dual-monitor workstations for each of the catalogers; separate work and search screens should further increase efficiency. A proposed ILS migration (fall 2008) is likely to have a significant impact on cataloging additions, not to mention a possible redesign of optimum workflows.

With the retirements, some of the redundancy that was built into the system—a product of long-term staff retention—will need to return. In the past, staff members were always confident, if not comfortable, performing another’s duties in an emergency. Such diversity will need to be included in future training. Finally, because the processing clerk is also responsible for ordering a growing number of supplies, the department, and the library as a whole, would benefit if this position were expanded to full time.

Conclusion

For years now, change has been a constant at the CRDL. It has come in various shapes and sizes and been driven by a variety of forces, but the changes initiated and met by staff have had the greatest impact on productivity and morale. In the department some functions have been concentrated in one individual, while others have been best improved by diversification. As a team, the department continually looks for improvements, constantly refining its efforts, striving to anticipate coming challenges. And if past successes are any indication, it is well prepared for the inevitable changes yet to come.

Endnote

1. Not all preprocessing can be avoided. Many audiovisual items must receive new cases (barcodes must be attached to the new case before cataloging) and security strips prior to being inserted in the cataloging queue. But because the bulk of the library’s materials are not AV items, this path does not appear in the diagram.

References