

Consultants in the Library

Uh Oh!

June 26, 2011



R2 Consulting LLC

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R2's Focus

- Library workflow analysis and redesign
- Organizational redesign
- Helping libraries shift priorities & activities
 - From print to electronic
 - From commonly-held to unique
- Strategies for sustainable print collections



SustainableCollections.com

Sustainable
Collection Services **SCS**

Data-Driven Deselection

Sustainable Collection Services (SCS) offers decision-support tools and consulting services to academic libraries looking to weed low-use monograph collections quickly and cost-effectively.

SCS Offerings

- Customized weeding reports that combine catalog circulation and item data with WorldCat holdings, Hathi Trust Digital Library holdings, and authoritative title lists
- Collection analysis report that profiles a library's collection against the collective collection: both print and digital
- Rules-based profiles for identifying withdrawal candidates, by subject and location, and customized to support local title protection rules
- Consulting on deselection projects and workflows
- Seminars and workshops for staff and stakeholders on rethinking library resources and on data-driven deselection



R2 Experience

Libraries

- University of Cincinnati
- University of Houston
- Queen's University
- University of Illinois-Chicago
- Auraria Library (UC-Denver)
- Colorado State
- UC-Riverside
- UC-Santa Cruz
- University of Oxford
- University of North Carolina-Chapel Hill
- DePaul University
- University of Colorado – Boulder
- Colby College
- Davidson College
- Vassar College
- Smith College

Vendors

- ABC-CLIO
- Blackwell Book Services
- Casalini Libri
- CAVAL Collaborative Solutions
- Common Ground Publishing
- Eastern Book Company
- Ebook Library (EBL)
- HARRASSOWITZ
- Innovative Interfaces
- Ingram Digital Group
- OCLC
- RR Bowker
- Sage Reference
- University of California Press
- Credo Reference
- YBP Library Services



Consultants in Paradise



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Consultant's Entrance



Why Workflow Analysis?



Changes in Academic Libraries

- Technology
- Philosophy
- Users
- Collection Development
- Acquisitions/Serials
- Cataloging/Discovery



Library Organizations

- Are designed and staffed to accommodate print collections and to serve walk-in users
- Are focused inward rather than outward
- Establish goals distinct from those of professors and researchers
- Fail to analyze and respond to user behavior
- Lack expertise in emerging areas of importance
- Allow expertise to reside in people rather than systems
- Have conflicting identities



Library Organizations

- Are inexperienced with setting production goals, performance standards, and strategic benchmarks
- Do not regularly measure performance
- Fail to confront poor performance
- Have not been expected to analyze costs
- Lack project management and/or change management skills
- Allow organizational silos and territories to inhibit innovation



Lots of Workflows



Workflows for P & E

- Collection Development
- Acquisitions
- Resource Description - Promotion
- Database Maintenance
- ILL/Document Delivery
- Reserves/Circulation
- Inventory Control
- Digitization
- Preservation
- Quality Control



Discovery Workflows

- Role of the catalog(s)?
- How many pathways to support?
- A-Z lists – databases and e-journals
- Course Management systems
- Web page design decisions
- Knowledgebase management
- Projecting the library into user environments
 - BB/Google Scholar/Wikipedia/Social Media
- Public Domain
- Hidden Collections
- Backlogs? Priorities?



Lifecycle Workflows

- Subscription/license renewals
- Troubleshooting e-access
- Management of copyright
- Withdrawals/Weeding
- Retrospective cataloging projects
- Data migrations
- Shifting/Storage/Space
- Archiving initiatives (print and digital)
- Discards/Donations/Book Sales



Workflow Dependencies

- Collection Development
- ILL and Acquisitions
- Acquisitions and Cataloging
- Vendors and agents
- Cataloging and web design
- Special Collections and Digital Initiatives
- Cataloging and Metadata Creation
- Consortial relationships
- Multiple campus libraries
- Inventory Control and Database Maintenance



What do the workflows tell us?

- What constitutes the mainstream?
- Where are the primary exceptions?
- Print vs. Electronic emphasis?
- Unique vs. common emphasis?
- Which tasks/results are most highly valued by library staff?



Where might we find or create
additional capacity
by changing what we do
and how we do it?



R2 Methodology



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R2 methodology – phase one



R2 Approach

- Understand the current practice and local culture
- Evaluate/propose strategic vision and strategies
- Recognize organizational strengths and weaknesses
- Assess capacity
- Identify low-value tasks
- Identify things not getting done
- Identify best possible practices and compare w/current
- Apply R2 workflow principles



R2 Workflow Principles

- Understand the costs of current practice
- Take full advantage of existing resources
- Ensure “big picture thinking”
- Simplify requirements
- Design linear processes
- Adhere to national and international standards
- Define and automate mainstream workflows
- Trust the system
- Outsource when effective
- Establish quantifiable goals and measure performance
- Control quality via sampling
- Make strategic choices



R2 Recommendations

- Lots of them
- Realistic and implementable
- Contextualized
- Operational and strategic
- From miniscule to massive
- Organizational – structure and culture
- Intended to challenge
- Intended to benefit users and ensure relevance



Process Overview

- Scope the project
- Compile data and documents
- Conduct interviews - onsite
- Draft report delivered and discussed with administration and/or project team
- Return visit and formal presentation (4-6 weeks after initial visit)
- Final report distributed to all staff



Potential Benefits

- Neutral third party perspective
- Appropriate expertise
- Business principles
- Extreme focus = speed
- Capacity
- Establishes a big picture – puts everyone's ideas in context
- Offers persuasive recommendations and vision
- The report can become a tool for making decisions and moving forward



Potential Drawbacks



Potential Drawbacks

- Significant expense
- Can conflict with other major events
- Undermines local initiatives
- Identifies problems that no one is really prepared to address
- Can be hurtful/upsetting/disruptive
- Clashes with local culture
- Raises questions of loyalty and confidentiality
- “I’ve been saying that for fifteen years.”
- Generates 18-24 months of work
- Too many constituencies





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R2 believes in libraries and their missions



R2 believes that libraries can and must do their work more effectively



R2 believes that libraries need to reinvent themselves to compete at Web scale



R2 believes that libraries must strike a balance between their historical role and their evolving role



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R2 believes that libraries must find new capacity from within their existing resources



R2 believes that libraries must shift staff efforts from print to digital, and from common to unique materials



R2 believes that libraries exist to bring value to their host institutions and their users



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R2 believes that every library is different, and must be managed accordingly



R2 believes that every library can improve its performance



R2 believes that our techniques can help many libraries



R2 believes in libraries and their missions