Introduction

For several years now, the UIUC Library has been in a transitional phase. Our users want full-text access to the Library’s information resources 24 hours a day and seven days a week, wherever they are. They like the convenience of working with text or images on their computer or PDA screen. Their request is simple: be where their eyes are, whether that place is the online catalog, Easy Search, Abstracting and Indexing databases, iShare, WorldCat, class courseware, Google, Microsoft Live, or Wikipedia. While the request is simple, fulfilling that request is a little more difficult. This level of access of discovery and access cannot be provided without the optimal use of metadata.

Our users have been telling us, sometimes shouting, that the UIUC Library must accelerate its transition from the traditional library, in which the online catalog has been at the center of its search capabilities, to the digital library, in which searching provides access to all available resources and shows users the best possible way to access their desired content, whether through full-text articles, digitized monographs, or print materials. Technical services units will play a critical role in the transition toward the digital library our users desire, but they cannot do so in their current form. Major changes, including the construction of a solid metadata infrastructure, are required.

Providing better access for all our resources gets right to the heart of the matter of the New Services Model recommendations released earlier this year. In July 2008, the Technical Service Coordination and Consolidation Team was charged to identify technical services functions (e.g. acquisitions, serials check-in, electronic resource management, cataloging and metadata creation) that can be successfully coordinated across the Library, and to define possible new roles for the online catalog and cataloging staff at the UIUC Library. The Team also was asked to bring decentralized technical services functions, including the Asian Library, the Slavic and East European Library (SEEL), Latin American and Caribbean Library (LACL), the Music and Performing Arts Library (MPAL), the History, Philosophy, and Newspaper Library (HPNL), and the Government Documents Library (GDL), into alignment with central technical services practices and procedures, and to increase the efficiency and effectiveness of technical services functions across the Library, through better coordination and training, and physical or virtual centralization.

The Team identified six major problems that the Library’s technical service units must immediately address:

1) Insufficient access to the Library’s growing electronic resources and digital content in all languages.
2) The inaccessibility of large parts of the Library’s legacy collections. The Library owns more than one-half million items to which it provides no bibliographic access. Consolidating our smaller technical services units into larger, more flexible teams will enhance our capacity to work with these materials and provide some level of access as a first step toward comprehensive access.
3) Less than optimal integration of acquisitions and cataloging operations. Whenever possible, acquisitions and cataloging functions should be incorporated into a single set of duties. This matches the new workflows and organizational actions that many of our peer ARL libraries and the Library of Congress are beginning to institute.
4) The failure to process, catalog, and create metadata for archival, unique, rare, and foreign language materials, as well as special collections, government documents, newspapers, and maps, in a consistently timely manner. Most of the current technical services FTE is used to provide access to
straightforward and ordinary print monographs and serials that hundreds of other libraries in the U.S. also hold. We need to flip that model.

5) The pressing need to use more automation to facilitate access to materials, particularly those in non-Roman languages. We do not consistently treat foreign language materials as we do materials ordered from U.S. and Western European vendors, for which we use EDI, obtain materials shelf-ready from vendors and publishers, load records obtained from vendors and publishers into Voyager, harvest records from other libraries’ catalogs through Z39.50 servers, and sometimes outsource items to contract cataloging services.

6) Inadequate training of many technical services personnel in the use of non-MARC metadata schemas, such as MODS, Dublin Core, VRA Core, and EADs. MARC has difficulty incorporating all the data elements needed to produce robust search capabilities. As we start digitizing more and more of our collections, we have to be good at more than one kind of cataloging. Currently, the Library has only two individuals working with non-MARC metadata schemas.

The Library must radically redesign its technical services (TS) work. It must enable TS personnel to make information resources accessible regardless of medium, language, or format; learn to utilize a broad range of metadata schemas; engage constantly in thoughtful and forward-looking discussions aimed at improving access to all resources; and constantly improve our search mechanisms, such as the online catalog, Easy Search, VUFind, WorldCat Local, and new search technologies on the horizon.

This radical redesign will also allow TS personnel to better work with maps, scores, DVDs, sound and video recordings, reference resources, and dissertations. We will be able to put additional resources into working with hundreds of thousands of photographs, streaming video recordings, digital content deposited into IDEALS (the University of Illinois institutional repository), digital objects from collections across the country for which Illinois Harvest is pulling in metadata through OAI-PMH, and datasets. Our users also are trying to locate these resources and utilize them in their research. We need to do a better job at making them accessible.

Guiding principles

THE TSCC Team applied some basic principles and guidelines to the recommendations that constitute most of the report:

- Technical services practices must reflect the needs of users.
- We must follow the “drift down” theory: no librarian should do a job that a paraprofessional can do, no paraprofessional should do a job that a student can do, and no human being should do a job that a machine can do.
- Eliminate redundancies.
- TS policies must be implemented and applied consistently.
- Efficiency can be enhanced by cross-training technical services staff to work with government documents, music, foreign-language materials, and different formats.
- We must shorten the period of time between publication, receipt, and access.
- Some level of access must be provided to all materials as a first step to comprehensive access. Some access is better than no access.
- It is important that the Library obtain and auto-load as many catalog records as possible via ONIX feeds, vendors and publishers; and increase the use of vendor provided services.
- Intellectual resources should be applied to areas that we cannot fully automate.
- Fewer resources should be devoted to materials that are straightforward, ordinary, or held by hundreds of libraries.
- We must redefine the Library’s mainstream to include special collections, foreign language materials, and a wide variety of formats.
- Adopt a perspective of “good enough.” Good enough is not a pejorative phrase.
Since we cannot achieve perfection or scrutinize every record, the Library must use sampling mechanisms to conduct quality control of technical services activities.

We should introduce daily, monthly, and annual benchmarking goals for all TS personnel, and celebrate our successes as we achieve them.

Specific Recommendations

Recommendation #1 – Consolidate currently decentralized cataloging and acquisitions work into CAM and Acquisitions

The Library is at a critical stage that calls for technical services units to find new capacity within existing resources in order to meet the challenges of providing better access to our collections. The Library needs more efficient and effective workflows to shorten the time between publication and providing access to our user communities. We must devote more staff to electronic resources and digital content, and develop a more systematic approach to dealing with our legacy items. It is time to streamline and automate work with straightforward and ordinary materials and dedicate more individuals to providing access to our rare, unique, and special collections.

To accomplish this, the Team recommends the consolidation of the Library’s currently decentralized cataloging and acquisitions work into Content Access Management (CAM) and the Acquisitions Department, through both physical and virtual reorganization, to create an environment that:

- promotes cross training for dealing with diverse resources, collections, formats, and languages;
- eliminates time-consuming redundancies;
- offers better opportunities for consistent training and documentation;
- creates larger groups of librarians and staff who can work with not only print monographs and serials but also with non-book formats (maps, images, websites, special collections, audio/visual resources, archival materials, visual resources, and datasets);
- allows more personnel to create metadata and use non-MARC schemas for our digital collections;
- pulls personnel from the Asian Library, the Slavic and East European Library (SEEL), the Music and Performing Arts Library (MPAL), the Latin American and Caribbean Library (LACL), the History, Philosophy, and Newspaper Library (HPNL), and the Government Documents Library (GDL) into leadership roles; and
- makes better use of programs and processes that CAM and Acquisitions currently use to automate acquisitions and cataloging work, such as MarcEdit, BatchCat, Gary Strawn Voyager software, batch processing of Connexion, Bib Cultivator, XSLT stylesheets to convert metadata records, and Z39.50 clients.

It is also important that as the Library begins to utilize metadata records from multiple places and vendors, quality will still be an important criterion in providing the best possible search environment for users. To ensure that processes are put in place to continuously upgrade and enhance metadata records, the Team recommends that within the next three months the Head of CAM convene a small team of librarians and staff to determine the most efficient way to perform quality control of metadata entering the Library’s various catalogs, databases and repositories.

Also, a new organizational structure for Technical Services was not addressed in this report. However, it is important that this be addressed as soon as possible. As this was not included in TSCC’s charge, the Team recommends the Library charge a second small group to submit proposals to the University Librarian and the Library’s Executive Committee for the creation of a new Technical Services Leadership Group. This task force would outline a plan to help pull together individuals from all technical services units into a new leadership
infrastructure (incorporating the talent and expertise of the Library’s technical services personnel) to tackle all ongoing major initiatives and projects aimed at making our collection more accessible to users.

Recommendation #2 – More copy cataloging done in Acquisitions

Acquisitions staff have performed copy cataloging of materials upon receipt for 18 months. Within the next three months, the Team recommends that CAM transfer four more copy catalogers to Acquisitions to expand this initiative. The Library of Congress and other members of the Association of Research Libraries (ARL) libraries are instituting new workflows and an organizational structure that combines acquisitions and cataloging. The UIUC Library should follow suit and create operations that incorporate receiving of materials and cataloging of materials into a single set of duties. The ultimate goal will be to have all straightforward and ordinary materials received and cataloged by staff in Room 12.

The Team recommends that as CAM and Acquisitions have several retirements in the next year, some of these salary funds saved go to setting up shelf-ready services with our monographic vendors. The shelf-ready process would allow the Library to receive materials for both our approval plan and via firm ordering. The Library would receive the books from the vendor already processed with spine labels, book pockets, targets, bookplates, the UIUC stamp, and barcodes attached according to our specifications. In addition, we receive a MARC file with our data included so that we can create a purchase order, load bibliographic records, create holdings records with call numbers, and add complete item records with barcode all through one bulk load. Once we get the materials, we simply need to receive them via the purchase order and send them off to be shelved. The cost for this service would be an additional $2 to $3 dollars per item, which we estimate to be significantly less than the overall cost of staffing necessary to do the work in house.

Working with the Music and Performing Arts Library and several other libraries, certain segments of our collections should be included in a pilot study were items will come in shelf-ready (with barcode, security strip, call number label, and bib, holding and item work done). This will allow certain monographs to go directly from shipping to the shelves, offering faster and more convenient access to new purchases.

Also, the Team recommends that Acquisitions and CAM continue further coordination with the Latin American and Caribbean (LAC) Library to develop and implement a streamlined access plan to process all new Latin American Blanket Order (LABO) plan titles upon receipt after January 2009. Working collaboratively, Acquisitions and LAC staff will create brief level cataloging for LABO plan titles as they arrive. All items with an OCLC number and ISBN will go to Oak Street Remote Storage facility. Subsequently, with the introduction of the OCLC Bibliographic Notification services, automated overlay and enhancement of bibliographic records will occur. In addition, all the LABO volumes’ title pages are scanned for the classification work to be accomplished later (see Recommendation #16). Any title that circulates will be flagged for immediate enhanced subject access work. The very small percentage of items without an OCLC number and ISBN will go to catalogers for cataloging. The project also includes the clean up of the current back log by confirming record availability in OCLC WorldCat. Working with staff in LAC Library (Silda Andrick) to create these new workflows will enable Acquisitions and CAM to outline plans to pull other non-English collections into a similar process of providing some level of access to all materials as a first step to comprehensive access.

Recommendation #3 – Merge Slavic and East European Library Acquisitions into Acquisitions Department

Within the next six to twelve months, the Team recommends that Slavic and Eastern European Acquisitions should physically consolidate with the Acquisitions department to better coordinate acquisitions functions and reduce redundancy of common actions for ordering, receiving, serials check-in, and processing of materials. The Acquisitions department has room for four individuals to relocate to Room 12. Through this repositioning of several individuals in the Slavic Library and through hiring additional students with knowledge of Slavic
languages, the Acquisitions department can help take on more of the ordering and receiving of print monographs and serials. This would include having students help check-in print serial issues.

The Acquisitions department would help work with foreign vendors to streamline the order process and automate creation of purchase orders and loading bibliographic records into Voyager. These processes have already been established for many U.S. and Western European monographic and serial vendors. The same work should be done when available for Russian, Eastern European, Chinese, Japanese, Korean, and East Asian materials.

By streamlining and automating as many of these processes as possible, distributing some of the ordering and processing of materials to a larger number of staff in Acquisitions, reducing the number of redundancies in both units, and using students to do more of the work that Slavic staff are currently responsible for, personnel who currently work with Slavic language materials will be able to devote more time to Slavic language electronic resources, identifying and making available more open access resources, helping with Library and international digitization projects and making this digital content discoverable around the world, and working with many items in non-print formats requiring language expertise.

**Recommendation #4 – Merge Slavic and East European Library cataloging staff into CAM**

The Team recommends that a more interactive and collaborative relationship needs to be developed between SEEL Cataloging and CAM units. The Team recommends that within the next three months a dedicated space be created in CAM that Slavic staff can use to work, interact with others, and help train and inform others in both units about Slavic cataloging procedures. Since some individuals in CAM know several Slavic languages (including Russian, Czech, Polish, Ukrainian, etc.), the Team recommends that CAM and Slavic Library technical services personnel meet immediately to discuss possibilities of CAM staff doing original cataloging, copy cataloging, retrospective clean-up of bibliographic records in the online catalog, and titles designated for the CIC/Google Digitization project.

The Team also recommends that harvesting tools such as MarcEdit and Tom Habing’s VBZoom be used to pull records from other online catalogs – particularly Russian State Library and other East European national libraries – and add them to our online catalogs or create databases to be targeted by Easy Search and other federated search engines. CAM can then use XLST stylesheets to convert these records to USMARC and pull them into Voyager and possibly OCLC. Serious serious consideration should be given to outsourcing of difficult to catalog materials to contract cataloging services. By the same token, serious consideration should be given not to expand collection development into areas (or accept gift collections) that currently lack technical support to provide access to such materials.

Close cooperation between CAM units and SEEL Cataloging will enable Slavic cataloging personnel to contribute to the CIC/Google Digitization project of hundreds of thousands of Slavic titles; create metadata for other Library digitization work, including the Open Content Alliance; and make Slavic language electronic resources more accessible via the Online Research Resource (ORR), the Discover/SFX service, the Voyager online catalog, VUFind, Easy Search, and OCLC WorldCat.

The Team recommends that the ultimate goal (6-12 months) for Slavic technical services will be a physical consolidation with CAM. Slavic cataloging staff would become a team within CAM, similar to the Monographic Cataloging, Serials Cataloging, Metadata Services, and Database Maintenance units now in existence. Individuals who currently work with Slavic language materials would continue to do so.

**Recommendation #5 – Merge Government Documents technical service work into CAM and Acquisitions**

The Government Documents Library (GDL) acquires, catalogs, and performs the physical processing of material obtained freely through the depository library programs of the federal governments of the U.S. and
Canada, the state of Illinois, and the United Nations. Three of the department’s five personnel catalog the vast majority of these resources.

The Government Information Service Team has been charged to collaborate with the TSCC Team in the development of “a plan for bringing materials currently processed in the Government Documents Library into the central technical services workflow by July 2009.” The Team has concluded that bringing government documents into the mainstream of the Library’s technical services operations will make them more accessible to users, allow additional Library personnel to work with these important resources, facilitate the automated harvesting and uploading of records obtained from vendors and other libraries, better enable GDL technical services staff to contribute to local and CIC/Google digitization work, and speed the incorporation of digital government publications into UIUC search mechanisms.

The TSCC Team therefore recommends that the Library integrate GDL technical services personnel into CAM within the next six months. The Acquisitions Department, CAM, and GDL should develop a plan for an orderly transition. As the charge of the Government Information Services Team states, “This plan should outline new workflows, identify specific steps or stages needed to transition to an integrated workflow, provide a timeline for implementing these steps, consider the impacts on the units involved, and identify staffing needs and responsibilities.”

Because Government Documents catalogers possess specialized knowledge that enables them to catalog government publications with great efficiency, GDL staff who are integrated into CAM should continue to focus on these materials. Current Government Documents personnel who have responsibilities outside the realm of technical services, such as collection development and instruction, should be allowed to continue this work. GDL technical services staff will have dedicated space and workstations in Room 220. Personnel in CAM and Acquisitions will be trained to catalog and process both analog and electronic government documents and will help carry out the retrospective work that needs to be done for items received prior to 1980.

Finally, the Team recommends that this new technical services team explore the use of Marcive for not only electronic publications but print titles as well, while also taking steps to maintain quality control. This should be done as soon as GDL technical services are integrated into CAM and Acquisitions. The use of records obtained directly from the Government Printing Office should also be considered.

**Recommendation #6 – Improve the coordination of Asian Library technical services with Acquisitions and CAM**

As with Slavic Library technical services functions, a more interactive and collaborative relationship needs to develop over the next 12 months between the Acquisitions and CAM units and the Asian Library faculty, staff and graduate assistants who perform technical service work. Since the Asian Library has limited resources to put toward technical service functions, additional coordination between the technical services units needs to occur that allow more Library personnel to work with non-English resources, to automate acquisitions and cataloging processes to allow users to access these Asian language materials as close to the date of publication as possible, to help manage the hundreds of thousands of electronic resources that are out there in the various Asian languages, and to help pull more Asian Library faculty and staff into assisting and sharing in the implementation of new bibliographic and metadata rules, standards, technologies, services, and search environments to aid all of us, particularly the Library’s users.

The Team recommends that CAM, Acquisitions, and the Asian Library immediately meet to discuss how they will better coordinate their technical services functions. This collaboration will determine how the three units will work together in acquiring and cataloging materials, assessing workflows, and streamlining technical
services processes. The three units will also create a detailed plan for integrating the Asian Library’s technical services personnel into CAM and Acquisitions when additional physical space is available.

The Team recommends that Acquisitions, CAM, and Asian Library personnel start working to create automated ways of searching and finding metadata records to have them populate the online catalog as quickly as possible, working with vendors to put services in place that streamline the services from acquisition to access, determine what materials can come in shelf-ready (the Asian Library uses LC classification), harvesting and batch-loading of metadata records, show how to use technologies to convert bibliographic data (even data residing in spreadsheets or existing on websites) into MARC records, and determine opportunities to outsource materials to contract cataloging services.

The Team recommends within the next three months that dedicated space be created in both CAM and Acquisitions that Asian Library faculty and staff can use to work, interact with others, help train and inform others in both units, talk through issues, or just to be around other catalogers or acquisitions people.

The Team recommends ongoing, frequent meetings between faculty doing Library acquisitions work to provide a frequent forum to talk and puzzle through many of the new initiatives, technologies, Voyager functionality, trends, vendors, and what other peer libraries are doing differently.

Since several individuals in CAM are fluent in several Asian languages (including Chinese, Korean, Sanskrit, etc.), the Team recommends that CAM and Asian Library technical services personnel meet immediately to discuss possibilities for CAM staff doing original cataloging, copy cataloging, retrospective clean-up of bibliographic records in the online catalog to help enhance records to prepare for the Google Digitization project, and retrospective work on backlogs.

**Recommendation #7 – Create a Coordinator for Non-Roman Cataloging, Metadata Creation, and Authority Control**

The Library should create a Coordinator of non-Roman Cataloging, Metadata Creation, and Authority Control responsible for overseeing the cataloging of non-Roman language materials, as the Cornell University Library and the Ohio State University Library have done. The Team recommends that the Library should do an internal call for individuals interested in coordinating making all these resources more accessible to our user communities. This individual would work with all the individuals in the Library acquiring or cataloging non-Roman language materials, including nearly 30,000 print items added to the collection each year, as well as thousands of online items. An example of the challenges this person would face is the incorporation of non-Roman electronic serial titles into the ORR and SFX Knowledge bases, in order to provide title-level and article-level access.

The Team also recommends that this individual coordinate metadata creation and bibliographic maintenance for the thousands of non-Roman language items to be digitized through the CIC Google Digitization project and other Library-wide digitization work. Currently, only two individuals create metadata for all Library digitization projects. The coordinator would help create metadata for non-Roman language materials. This individual would be responsible for prioritizing and targeting materials to outsource to contract cataloging and authority control services. Having one person coordinate these activities would reduce redundancies and confusion and deliver both analog and digital content to our users as quickly as possible.

The Team recommends that one of the first items on the priorities list for the Coordinator of non-Roman Cataloging, Metadata Creation, and Authority Control should be the production of a white paper on incorporating non-Roman languages into our bibliographic records, online catalog displays (including VUFind), and federated search capabilities. The Library has a rich collection of materials in non-Roman languages and needs to enable searches using non-Roman scripts, which the conversion to Unicode in Voyager
made possible for some of our collections but not all. This paper would serve as a plan of action for the next two years.

Finally, the Team **recommends** that this Coordinator take the lead on enabling additional personnel to use translation software for non-Roman language materials.

**Recommendation #8 – Pursue Additional Funding to work with East Asian, Slavic, Chinese, Japanese, Korean, and Middle Eastern language resources**

In the UIUC Strategic Plan, the campus calls for a continued international focus. The Team recommends three options for acquiring the additional linguistic expertise this international focus requires.

- Pursue an excellence hire of an individual who can work with non-Roman languages. This individual should have extensive experience in the use of non-MARC metadata schemas and digital resources in these languages. The Provost’s Office, rather than the Library, would be responsible for this person’s salary. **Cost: $0.**

- Provide funds for hiring graduate and academic hourly employees who can transliterate and create basic metadata records for particular foreign language resources. **Cost: $20,000 annually.**

- Use contract cataloging services to do original or complex copy cataloging when necessary (see Recommendation #13 for more information). **Between $12 to $40 dollars per title.**

**Recommendation #9 – Create virtual reporting lines between Music Cataloging and CAM and have the Music and Performing Arts Library involved with Library-wide projects**

The Team **recommends** that the Library immediately establish a virtually coordinated relationship between CAM and the Music and Performing Arts Library (MPAL). For several months now, the Music and Performing Arts Library and CAM have been working virtually with each other to performing copy cataloging of theater and performing arts monographs and it has been a successful relationship. CAM has also helped train a member of Music and Performing Arts Library staff to do copy cataloging of straightforward materials. MPAL cataloging staff will remain in their present location but report organizationally to the Head of CAM, who will define cataloging priorities, daily workflows, training, documentation, updating policies and procedures, and holding monthly meetings.

The Team also **recommends** that the Music and Performing Arts Library faculty help in two additional areas. One is improving authority control measures in the online catalog. The Library has thousands and thousands of author names and subject headings that do not match our authorized headings. We have tools and programs to help rectify these problems but no plan of action. The Team **recommends** that a team, including Shuyong Jiang, Marek Sroka, John Wagstaff, Stephanie Baker, Atoma Batoma and Gail Hueting, be formed to formulate a plan to deal with authority control for the Library.

Second, the Library is trying to figure out the role of LC classification going into the future. With our new interfaces, new possibilities have emerged to utilize both Dewey and LC classifications to virtually browse our collections using either Dewey or LC call numbers. Since the Music and Performing Arts Library is one of our libraries that uses LC classification, it is a natural fit to pull Music technical services personnel into leading this project to determine feasibility. Since the Music and Performing Arts Library utilizes LC Classification daily, the Team **recommends** that MPAL faculty contribute in the creation of a white paper to explore possible use of LC Classification at the UIUC Library (for more information, see Recommendation #11).

Finally, the Team **recommends** that the MPAL Library be the first participant in the new program to work with Acquisitions and book vendors (when we know who is chosen through the ongoing RFP process) to have materials come in shelf-ready, reducing the need for some materials to be touched by Library staff. As we get
more and more of the Music Library monographs coming in shelf-ready or have staff in Acquisitions and CAM perform copy cataloging of these materials, the Music Library cataloging staff can dedicate more time to formats requiring specialized knowledge.

**Recommendation #10 - Expand collaboration between Information Processing Management (IPM) and other technical services units**

One area of success we can update the Library on through this report is the successful relocation of the Information Processing Management (IPM) unit from the Undergraduate Library to Room 200 North in the Main Library, right next to CAM. This planned move occurred during this past summer. Immediately, IPM started working collaboratively with both Acquisitions and CAM to cross-train individuals in both units to work with E—Reserves and Print Reserves. This past August and September, staff from Acquisitions and CAM were able to contribute during peak times to getting these reserve items out there as quickly as possible for the students to use for their classes, and IPM was able to significantly shorten the turnaround time between request and accessibility of course materials. As the table below shows, IPM processes tens of thousands of resources each semester.

<table>
<thead>
<tr>
<th>Semester</th>
<th>E-reserve Links</th>
<th>Print Reserves</th>
<th>Media Reserves</th>
<th>Total Reserves</th>
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<tr>
<td>Fall 2002</td>
<td>1,628</td>
<td>1,013</td>
<td>250</td>
<td>2891</td>
</tr>
<tr>
<td>Fall 2003</td>
<td>7,107</td>
<td>1,102</td>
<td>300</td>
<td>8509</td>
</tr>
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<td>Fall 2004</td>
<td>9,564</td>
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<td>Fall 2005</td>
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<td>Fall 2006</td>
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<tr>
<td>Fall 2007</td>
<td>17,182</td>
<td>2,547</td>
<td>1,245</td>
<td>20974</td>
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</tbody>
</table>

The majority of staff time within the Information Processing & Management unit is spent performing a variety of technical services functions such as processing reserves in all formats (electronic, print and media), media acquisitions and cataloging, and a variety of other projects. Most notably since the move from the Undergraduate Library to 200N, IPM has taken on responsibility for working with the large backlog of gift materials, and is also assisting with a number of other smaller library-wide projects including determining copyright status for monographs being digitized by the Library for the Open Content Alliance project, preparing materials to be sent to Oak Street for the LIS Library, and retrospective clean-up of bibliographic records in the online catalog. This work has enabled staff in CAM and Acquisitions to concentrate on doing more original cataloging and complex copy cataloging for the unique items coming into the Library’s collections. As much as the new incarnation of IPM serves as a new model for staff cross-training and a bridge between CAM and Acquisitions, next steps will include further exploration of better consolidation and cohesion with other technical service divisional units such as Digital Content Creation.

Since it is not likely that the Library will be able to hire new faculty or staff members to do technical services work in the near future, the Team **recommends** that this collaborative work environment be extended to the other technical services units as well. The more individuals we cross-train to be able to do this reserves work, the sooner the peak period of work gets completed each semester. This in turn will allow IPM (as time allows) to help with more of those digitization, cataloging and retrospective clean-up projects that pop up each year.
**Recommendation #11 – Better utilization of LC Classification at UIUC Library**

As the Library of Congress Classification scheme is the predominant one used throughout the United States in academic libraries, the UIUC Library’s continued use of Dewey Decimal Classification exacerbates the additional work that technical services personnel has to perform with each individual piece that comes into the Library. As many have said, the UIUC Library may be long past the point it can seriously think about switching over to using LC Classification rather than Dewey. But, there are several scenarios where the Library can incorporate LC Classification into its emerging search environments such as Easy Search, VUFind and WorldCat Local. With our new interfaces and information portals, and the harvesting capabilities we have from new tools, possibilities have emerged to utilize both Dewey and LC classifications to virtually browse our collections. Also, as more and more materials are sent to the Oak Street Remote Storage facilities, the Library has additional options that were not conceivable 2 to 3 years ago.

With new storage options and new tools, new services the Library could maximize from monographic vendors, and the ability to harvest call number information from various sources, the Team recommends that a small team be formed, pulling personnel from the Music and Performing Art Library, Asian Library, and other Technical Services and Public Services units, to create a white paper exploring possible use of LC Classification at the UIUC Library.

**Recommendation #12 – With few TS faculty hires coming in the near future, pull civil service staff into doing higher-level work**

According to the 2007/2008 ARL stats, the Library owns 527, 201 uncataloged items, including monographs, microfilm, scores, foreign-language materials, and rare and special collections. Therefore, it is not surprising that the Library’s original cataloging in OCLC has declined steadily and lags far behind that of many peer institutions, as Table 2 demonstrates.

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<thead>
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<td>6,206</td>
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<tr>
<td>Ohio State University</td>
<td>3,907</td>
<td>4,184</td>
<td>5,068</td>
<td>5,412</td>
<td>5,297</td>
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<td>University of Wisconsin</td>
<td>3,418</td>
<td>4,272</td>
<td>4,502</td>
<td>6,159</td>
<td>6,557</td>
</tr>
<tr>
<td>Indiana University</td>
<td>2,700</td>
<td>4,313</td>
<td>4,852</td>
<td>5,037</td>
<td>5,512</td>
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<tr>
<td>University of Illinois</td>
<td>1,618</td>
<td>2,061</td>
<td>2,339</td>
<td>2,391</td>
<td>2,873</td>
</tr>
</tbody>
</table>
The Library has an enormous amount of unique material, but it is not providing access to it in a timely manner. It devotes too much time to cataloging the more straightforward and ordinary materials which hundred of other libraries also hold, but not enough to its unique titles, which include foreign language materials, maps, newspapers, images, websites, special collections, audio/visual resources, archival materials, visual resources, and datasets. Additional individuals, particularly Library Senior Specialist staff, many of whom possess foreign language expertise, need to make original and complex cataloging of these backlogs a high priority.

The Team **recommends** that a small group be created immediately for the purpose of identifying staff throughout the technical services units who can create original MARC or Dublin Core records (which can be cross-walked into MARC records through an automated process at a later date). Within 4 weeks, the group should recommend a team of staff that can carry out this work.

In addition, the Team **recommends** that within the next six months the Library form of a swat team of graduate hourly individuals to create minimal-level records and provide basic access to certain materials. This could be funded by a grant submitted to Tom Teper for the annual National Endowment for the Humanities (NEH).

**Recommendation #13 – Outsource some original and complex cataloging**

The cataloging of some materials in our backlogs—particularly those in languages that no one in the Library can read—should be outsourced to commercial cataloging services such as Backstage Library Works and WorldCAAt Cataloging Partners. The Library has already utilized some of these services, such as MarcNow for project and vendor-related work.

Costs for these services vary including:

1. Illinois Cataloging Centers (there are four state-wide, with the closest one located at Lincoln Trials Library). Cataloging cost can range from $12 dollars for copy and $20 to $30 dollars for original cataloging. The Illinois State Library helps reduce the cost for state institutions like UIUC Library.
2. OCLC Contract Cataloging services charges $39 dollars for full-level original cataloging (non-Roman), $24 dollars full-level original cataloging for Western languages, $15 dollars for minimal-level cataloging, and $7 dollars for abbreviated-level cataloging. The overall average for most libraries, mixing copy and original cataloging of all formats and languages, is $16 dollars per title.
3. Other contract cataloging services, including Backstage, MINITEX, MarcNow, and C. Berger Group, cost between $20 to $40 dollars to do original cataloging. Many times, this is less than the cost the Library can do it in-house

The Team **recommends** that within the FY 2009/2010 budget, the Library create a pool of money (between $20,000 to $30,000) that can be used to outsource some of our more difficult items to catalog to one, or several, of these contract cataloging services. By combining outsourcing with having more individuals in CAM work with the more complex and unique materials, the Library can start to reduce in large quantities the number of items in our uncataloged collections.

**Recommendation #14 – Do more original cataloging and enhancement of records in OCLC WorldCat**

The Library does much less original cataloging and enhancement of minimum-level OCLC records than peer ARL libraries (see Table 2). This deficit has financial consequences. OCLC member libraries receive a credit of $8 for every unique record contributed to the utility and $6.05 for the enhancement of a minimal-level record, which most commonly requires the addition of subject headings. As Table 3 indicates, the Library’s credits for original cataloging and enhancement totaled only $12,944 in 2007. Contributing and enhancing more records would substantially reduce the annual fee paid to OCLC, which exceeds $400,000.
Table 3. Number of original records contributed to OCLC and corresponding credit in 2007

<table>
<thead>
<tr>
<th>Library</th>
<th>Original Cataloging in OCLC - 2007</th>
<th>Credit for Cataloging in OCLC - 2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>Harvard University</td>
<td>14,125</td>
<td>$113,000</td>
</tr>
<tr>
<td>Cornell University</td>
<td>7,908</td>
<td>$63,264</td>
</tr>
<tr>
<td>University of California</td>
<td>5,880</td>
<td>$47,040</td>
</tr>
<tr>
<td>(Berkeley)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>University of Chicago</td>
<td>4,457</td>
<td>$35,656</td>
</tr>
<tr>
<td>Ohio State University</td>
<td>3,907</td>
<td>$31,256</td>
</tr>
<tr>
<td>Yale University</td>
<td>3,557</td>
<td>$28,456</td>
</tr>
<tr>
<td>University of Wisconsin</td>
<td>3,418</td>
<td>$27,344</td>
</tr>
<tr>
<td>Indiana University</td>
<td>2,700</td>
<td>$21,600</td>
</tr>
<tr>
<td>University of Illinois</td>
<td>1,618</td>
<td>$12,944</td>
</tr>
</tbody>
</table>

Many of the Library’s technical services workflows call for setting items aside if there are no records in OCLC to wait until a bibliographic record does appear in WorldCat. Like many other libraries, we do not create minimal-level records in OCLC (some of us do this in Voyager catalog) for our unique materials (determined to create full-level records or nothing). We need to adopt as a guiding principle that some level of access must be provided to all materials as a first step to comprehensive access. Over time, enhancement of these records (by us or another library) will occur, and, through the OCLC Bibliographic Notification service which are currently implementing, our records will automatically be updated and upgraded to full-level cataloging.

The Team recommends that we reorganize our technical services operations and personnel to have more of the straightforward and ordinary materials cataloged upon receipt in Acquisitions. This would allow the Library to free up personnel to work with our unique and rare materials. Items and titles outsourced would also be uploaded to OCLC and thus receive (if it is original cataloging) the OCLC credit for contributing unique records to WorldCat. Policies and best practices should be updated to require that cataloging work (including original and enhanced records) be completed in OCLC Connexion client. These actions would reduce our future OCLC bills and, above all, help provide better access.

**Recommendation #15 - Bridge the service gap between full text access and print holdings**

If the axiom “Material must be visible online if it is to be visible at all” is true, the Library needs to substantially improve electronic access to its print collections. As we know, not all worthwhile information is available through only searching Google, Yahoo, Opera, or Microsoft Live. Much of that important information still resides in our print monographs, serials, manuscripts, and archival materials. The Library needs to make it easier for users to navigate the various pathways to find this information, jumping to the full-text when available, but, if not available online, then showing as clear a path as possible to that content.
The Team recommends that the Library immediately create a team of librarians and staff from Technical Services and Public Services to build the services needed to give users seamless access to print holdings at both the article and chapter level content. The Library needs to take greater advantage of the SFX services to link not only to the full text but to highlight options for the print access when the full text is not available online. This pilot project would expand on the Doc Express service to better assess user demand for desk top delivery of pdfs of article or chapters discovered online. For titles not owned at all, this new service would direct users to interlibrary loan services. This requires a review of the services now in SFX, a review of print summary holdings statements for core serial titles initially and support for the services offered. The use of these services will provide for important information on user behaviors that will inform our presentation of services and will help highlight potential new purchases of serial backfiles or e-book packages.

Recommendation # 16 – Expand retrospective and cleanup bibliographic work to unit libraries through the creation of Web services

In order to maximize access to its print collections, the Library must do an enormous amount of bibliographic cleanup and retrospective maintenance over several years. Hundreds of thousands of items in our backlogs need to be searched in OCLC and other catalogs around the world to see if corresponding metadata exists. There are thousands of BriefCat materials sitting in the basement of the Main Library. There are 225,000 MARCette records still populating the online catalog. There are thousands of open access materials sitting out there waiting for someone to bring a record of the resource into one of our search pathways (online catalog, ORR, Discover/SFX service, Illinois Harvest, Easy Search, etc.). There are not enough Technical Services librarians and staff to handle all the work that needs to be accomplished.

One idea that has been discussed many times over the past few years is to have individuals from other units help search for existing metadata records that are out there ready to be discovered. CAM has already created search mechanisms that can automatically search items that have identifiers such as ISBNs, ISSN, LCCNs, CODEN, etc. But, many older items don’t have ISBNs or ISSNs. We need individuals to take lists of items (with author, title, publisher, year of publication, and other pertinent information) and search OCLC, other library catalogs, A&I databases, and even Google. We can create search engines that will search all of these at the same time (an Easy Search for metadata records). Technologies exist that would allow this kind of work to be distributed across library and departmental units, using web services, to allow individuals to login, get a batch of resources that need to be searched, use federated searches to find matches, and then enter into the web service an OCLC number, A&I citation number, Amazon or Google Books URLs, Google or Wikipedia entry, etc. Individuals would enter any source link where metadata could be harvested to create bibliographic records.

With hundreds of thousands of titles needing bibliographic attention, the Team recommends that a web service be created that would allow individuals across the Library to search across the Web to discover bibliographic records or data to pull into our online catalogs and search environments. This will require collaboration between Technical Services and the Grainger Library to create this web service. Easy Search could be used as a model. The Team also recommends that a small group be formed to study feasibility of involving librarians, staff, graduate assistants, and student employees from across the Library to help with this work. Some libraries and units will not have capacity to participate in this work. Others units could possibly have individuals help do these searches during slow times at the circulation desk or particular times during the semester. One example of this work is the virtual classification work that can now occur with the LABO books going to Oak Street. The title pages are scanned and can be pushed to LACC staff (Silda Andrick) for the classification work necessary. Acquisitions and CAM are currently working to post documentation and create video tutorials to allow Library personnel to easily access training aids to guide them in this independent work. This recommended group would submit a report to the University Librarian by March 2009 to outline possibilities for setting up such processes.
Appendix A: Charge and Membership of the Technical Services Coordination and Consolidation Team

The Technical Services Coordination and Consolidation Team is charged with identifying technical services functions (e.g., acquisitions, serials check-in, electronic resource management, cataloging, and metadata creation) that can be successfully coordinated across the Library, and that can benefit from the opportunity to bring decentralized technical service functions into alignment with central technical services practices and procedures, especially in units that currently manage separate acquisitions and cataloging functions, including the Asian, Slavic, Music and Performing Arts, Government Documents, and Undergraduate libraries. The group's focus should be on issues relating to increasing the efficiency and effectiveness of technical services functions across the Library in a two-step process: improving coordination and training, and physical or virtual centralization.

By August 15, 2008 the group should produce a report for the University Librarian that identifies:

- Programs that will promote open discussion among Library faculty and staff about new initiatives taking root in our professional community to enhance technical services programs and provide better access to library resources.
- Opportunities for more effective coordination of technical service efforts across the Library through staff training, increased communication and collaboration (physical and virtual), shared standards and best practices.
- Workable approaches to coordinating and consolidating technical services functions.
- Opportunities and recommended approaches for consolidation and coordination of technical services functions.

This report should provide a long-term view of the future of technical services programs in the University Library, as well as an action plan outlining how to adopt a phased approach to coordinating and/or consolidating technical service programs currently housed in units including, but not limited to, the Asian, Slavic, Music and Performing Arts, Government Documents, and Undergraduate libraries.

Membership:

- Michael Norman, Content Access Management (Team Leader)
- Shuyong Jiang, Asian Library
- Marek Sroka, Slavic and East European Library
- Richard Burbank, Music Library
- Lynn Wiley, Acquisitions
- Mary Laskowski, Content Access Management
- David Griffiths, Government Documents Library
- Karen Wei, Asian Library
- Janice Pilch, Slavic Library
- Scott Walter, Associate University Librarian for Services (ex officio)
<table>
<thead>
<tr>
<th>Recommendation #</th>
<th>Specific Recommendations</th>
<th>Implementation Phase</th>
<th>New Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recommendation #1 - Consolidate currently decentralized cataloging &amp; acquisitions into CAM &amp; ACQ</td>
<td><strong>Recommends</strong> the consolidation of the Library’s currently decentralized cataloging and acquisitions work into Content Access Management (CAM) and the Acquisitions Department, through both physical and virtual reorganization.</td>
<td>Within the next 12 months</td>
<td></td>
</tr>
<tr>
<td>Recommendation #2 – More copy cataloging done in Acquisitions</td>
<td><strong>Recommends</strong> the Library charge a second small group to submit new opportunities to the University Librarian for the creation of a new Technical Services leadership group.</td>
<td>Within the next 3 months</td>
<td></td>
</tr>
<tr>
<td>Recommendation #2 – More copy cataloging done in Acquisitions</td>
<td><strong>Recommends</strong> that within the next three months the Head of CAM convene a team of librarians and staff to determine the most efficient way to perform quality control of metadata entering the Library’s various catalogs, databases and repositories.</td>
<td>Within the next 3 months</td>
<td></td>
</tr>
<tr>
<td>Recommendation #3 – Merge Slavic Acquisitions into Acquisitions Department</td>
<td><strong>Recommends</strong> that Slavic Acquisitions should physically consolidate with the Acquisitions department to better coordinate acquisitions functions and reduce redundancy of actions for ordering, receiving, serials check-in, and processing materials.</td>
<td>Within the next 6 to 12 months</td>
<td></td>
</tr>
<tr>
<td>Recommendation #4 – Merge Slavic Cataloging into CAM</td>
<td><strong>Recommends</strong> that within the next three months a dedicated space be created in CAM that Slavic staff can use to work, interact with others, and help train and inform others in both units about Slavic cataloging procedures.</td>
<td>Within the next 3 to 6 months</td>
<td></td>
</tr>
<tr>
<td>Recommendation #5 – Merge Government Documents technical service work into CAM and Acquisitions</td>
<td><strong>Recommends</strong> that within the next six months the GDL technical service personnel should be consolidated into CAM. The Acquisitions Department, CAM and Government Documents Library should meet to identify specific steps needed to transition to an integrated workflow, and, in written agreement, work out a detailed plan as to how to pull the technical services personnel into Room 220.</td>
<td>Within the next 6 months</td>
<td></td>
</tr>
<tr>
<td>Recommendation #5 – Merge Government Documents technical service work into CAM and Acquisitions</td>
<td><strong>Recommends</strong> that GDL staff who are integrated into CAM should continue current work.</td>
<td>Within the next 6 months</td>
<td></td>
</tr>
<tr>
<td>Recommendation #5 – Merge Government Documents technical service work into CAM and Acquisitions</td>
<td><strong>Recommends</strong> that GDL work with CAM and Acquisitions personnel to explore the use of Marcive and/or Government Printing Office for not only electronic publications but print titles as well.</td>
<td>Within the next 6 months</td>
<td></td>
</tr>
<tr>
<td>Recommendation #6 – Improve coordination of Asian Library technical services with Acquisitions and CAM</td>
<td><strong>Recommends</strong> that CAM, Acquisitions, and the Asian Library immediately meet to discuss how they will better coordinate their technical services functions. This collaboration will determine how the three units will work together in acquiring and cataloging materials, assessing workflows, and streamlining technical services processes. The three units will also create a detailed plan for integrating the Asian Library’s technical services personnel into CAM and Acquisitions when additional physical space.</td>
<td>Within the next 3 months</td>
<td></td>
</tr>
</tbody>
</table>
is available.

**Recommend** recommends that Acquisitions, CAM, and Asian Library personnel immediately start working to create automated ways of searching and finding metadata records to have them populate the online catalog as quickly as possible, etc. **Within the next 3 months**

**Recommend** ongoing, frequent meetings between faculty doing Library acquisitions work to provide a frequent forum to talk and puzzle through many of the new initiatives, technologies, Voyager functionality, trends, vendors, and what other peer libraries are doing differently. **Within the next 3 months**

**Recommend** that CAM and Asian Library technical services personnel meet immediately to discuss possibilities of CAM staff doing original cataloging, copy cataloging, retrospective clean-up of bibliographic records in the online catalog, help enhance records for Google Digitization, and retrospective work on backlogs. **Within the next 3 months**

**Recommendation #7 – Create a Coordinator for Non-Roman Cataloging, Metadata Creation, and Authority Control**

**Recommend** that the Library should do an internal call for individuals interested in becoming Coordinator for Non-Roman Cataloging, Metadata Creation, and Authority Control **Within the next 3 to 6 months**

**Recommend** that this position coordinate the metadata creation and bibliographic maintenance of the thousands of non-Roman language items to be digitized through the CIC Google Digitization Project and other Library-wide digitization projects. **Within the next 6 months**

**Recommend** that one of the first items on the priorities list for the Coordinator of non-Roman Cataloging, Metadata Creation, and Authority Control should be the production of a white paper to demonstrate how to better incorporate non-Roman languages into our bibliographic records, online catalog displays (including VUFInd), and federated search capabilities. **Within the next 6 months**

**Recommend** that this position become the resource for the Library in using new technologies and tools to enable additional library personnel to use translational software or programs on non-Roman language materials. **Within the next 6 months**

**Recommendation #8 – Pursue Additional Funding to work with East Asian, Slavic, Indian, and Middle Eastern resources**

**Recommend** that the Library pursue an excellence hire of an individual who can work with non-Roman character-based languages such as Chinese, Japanese, Korean, Hebrew, Russian or other Slavic languages, Malay, Tamil, or Indo-Aryan languages. **$0 no cost to the Library; comes from the Provost**

**Recommend** the Library create a budget of graduate/academic hourly funds to pull in individuals from the campus or community to help transliterate and create basic metadata records **FY 2009/2010 $20,000 recurring**

**Recommend** setting up a process with contract cataloging services to send materials (or scans of title pages) when needed. **FY 2009/2010 Between $12-$40 per title**

**Recommendation #9 – Create virtual reporting lines between Music Cataloging and CAM and have Music Library help with Library-wide projects**

**Recommend** that the Library immediately establish a virtually coordinated relationship between CAM and the Music and Performing Arts Library (MPAL); MPAL cataloging staff will remain in their present location but report organizationally to the Head of CAM to define cataloging priorities, daily workflows, training, documentation, updating policies and procedures, and hold monthly meetings. **By January, 2009**

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**Recommend** that the Music and Performing Arts Library faculty help in improving authority control measures in the online catalog. The Team recommends that a team, including Shuyong Jiang, Marek Sroka, John Wagstaff, Stephanie Baker, Atoma Batoma and Gail Hueting, be formed to create a plan to deal with authority control. **Within the next 6 months**
| Recommendation #10 - Expand Collaborative Model Between Information Processing Management (IPM) With other Technical Service units | **Recommends** that the MPAL Library be the first participant in the new program to work with Acquisitions and book vendor (when we know who is chosen through the ongoing RFP process) to have materials come in shelf-ready, reducing the need for some materials to be touched by Library staff | Within the next 6 to 9 months |
| Recommendation #11 – Better utilization of LC Classification at UIUC Library | **Recommends** that this collaborative work environment be extended to the other technical services units as well. The more individuals we cross-train to be able to do this reserve work, the sooner the peak period of work gets completed each semester. This in turn will allow IPM (as time allows) to help with more of these digitization, cataloging and retrospective clean-up projects that pop up each year | Within the next 6 to 9 months |
| Recommendation #12 – With few TS faculty hires coming in the near future, pull civil service staff into doing higher-level work | **Recommends** that a small team be formed, pulling from Music and Performing Art Library, Asian Library, and other libraries currently using LC Classification and other Technical Services and Public Services units, to create of a white paper to explore possible use of LC Classification at the UIUC Library. | Within the next 6 months |
| Recommendation #13 – Outsource some complex and original cataloging | **Recommends** that the formation of a swat team of graduate hourly individuals to target certain backlogs of materials and create minimal-level records to be added to locate online catalog and also OCLC WorldCat to provide a basic level of access to UIUC users and users worldwide. | Within the next 3 months, Pull from Technical Service budgets |
| Recommendation #14 – Do more original cataloging and enhancement of records in OCLC WorldCat | **Recommends** that within the FY 2009/2010 budget, the Library create a pool of money (around $30,000 to $40,000) that can be budgeted to outsource some of our more difficult items to catalog to one, or several, of these contract cataloging services. | FY 2009/2010 $30,000 |
| Recommendation #15 - Bridge the service gap between full text access and print holdings | **Recommends** that we reorganize our technical services operations and personnel to have more of the straightforward and ordinary materials cataloged upon receipt in Acquisitions, getting more materials in that are shelf-ready and go straight to the shelves upon receipt, have students work with materials they are capable of cataloging, and automating bibliographic and authority control maintenance. | Within the next 6 to 9 months |
| Recommendation #16 - Expand retrospective and cleanup bibliographic work to unit libraries by Web Services | **Recommends** that a web service be created that would allow individuals across the Library to search across the Web to discover bibliographic records or data to pull into our online catalogs and search environments. | Within the next 3 months |