



# Homegrown Outsourcing: A Cooperative Cataloging Pilot Between Duke University and the University of North Carolina at Chapel Hill

Denise Soufi

*Middle Eastern Cataloger  
The University of North Carolina at Chapel Hill*

Nanako Thomas

*Catalog Librarian for Japanese Language Resources  
Duke University*

Natalie Sommerville

*Team Lead, Monographic Original Cataloging  
Duke University*

ALCTS CaMMS Cataloging Norms Interest Group

June 22, 2019

# Triangle Research Libraries Network (TRLN)

## Collaborative organization in the “Triangle” of North Carolina

- Duke University
- North Carolina Central University
- North Carolina State University
- The University of North Carolina at Chapel Hill

**Purpose:** “To marshal the financial, human, and information resources of their research libraries through cooperative efforts in order to create a rich and unparalleled knowledge environment that furthers the universities’ teaching, research, and service missions.”



# Stage 1

## **The TRLN Cooperative Cataloging Pilot Charge**

Examine the logistics, workflows, efficiency, cost and benefits of TRLN cooperative cataloging compared to vendor outsourcing

# Stage 1

## The TRLN Cooperative Cataloging Pilot Charge

Examine the logistics, workflows, efficiency, cost and benefits of TRLN cooperative cataloging compared to vendor outsourcing

### Project Charter

- Define the project's objective and scope
  - 100 Japanese titles sent by UNC to Duke
  - 100 Arabic titles sent by Duke to UNC
- Set deadlines for deliverables and milestones
- Outline team members, their roles and their time commitment

# Stage 1

## The TRLN Cooperative Cataloging Pilot Charge

Examine the logistics, workflows, efficiency, cost and benefits of TRLN cooperative cataloging compared to vendor outsourcing

### Project Charter

- Define the project's objective and scope
  - 100 Japanese titles sent by UNC to Duke
  - 100 Arabic titles sent by Duke to UNC
- Set deadlines for deliverables and milestones
- Outline team members, their roles and their time commitment

### Cooperative Cataloging Agreement

- Method for shipping books
- Standard of cataloging
- Procedures for tracking records and time
- Method for quality control
- Local procedures for importing records

# Stage 2

## Cataloging tasks

- Time spent cataloging
- Type of cataloging: original, enhance copy, non-enhance copy
- Peripheral cataloging: NACO records and PCC-level enhancements

## Cataloging Results

	Number of Titles			Number of Hours	
	Original (New)	Enhanced Copy	Non-Enhanced Copy	Cataloging	Peripheral Cataloging
Duke	75	25	0	68	1.5
UNC	43	56	5	35	3

# Stage 2

## Other Tasks

- Book selection
- Tracking books
- Packing and unpacking books
- Quality control
- Importing records into local ILS

## Time, in Hours, Spent on Other Tasks

	Book Selection	Tracking, Packing, QC	Importing Records	Total Time
Duke	7	4.5	5	16.5
UNC	2	5.5	19.5*	27

*\*Includes time spent on development*

# Stage 3

## Data Analysis

### Duke and UNC

#### Basic cost

- Cataloging
- Local check-out and check-in procedures
- Packing and unpacking books

#### Extras

- Peripheral cataloging
- Quality control

### Vendor (statistics provided by Duke)

#### Basic cost

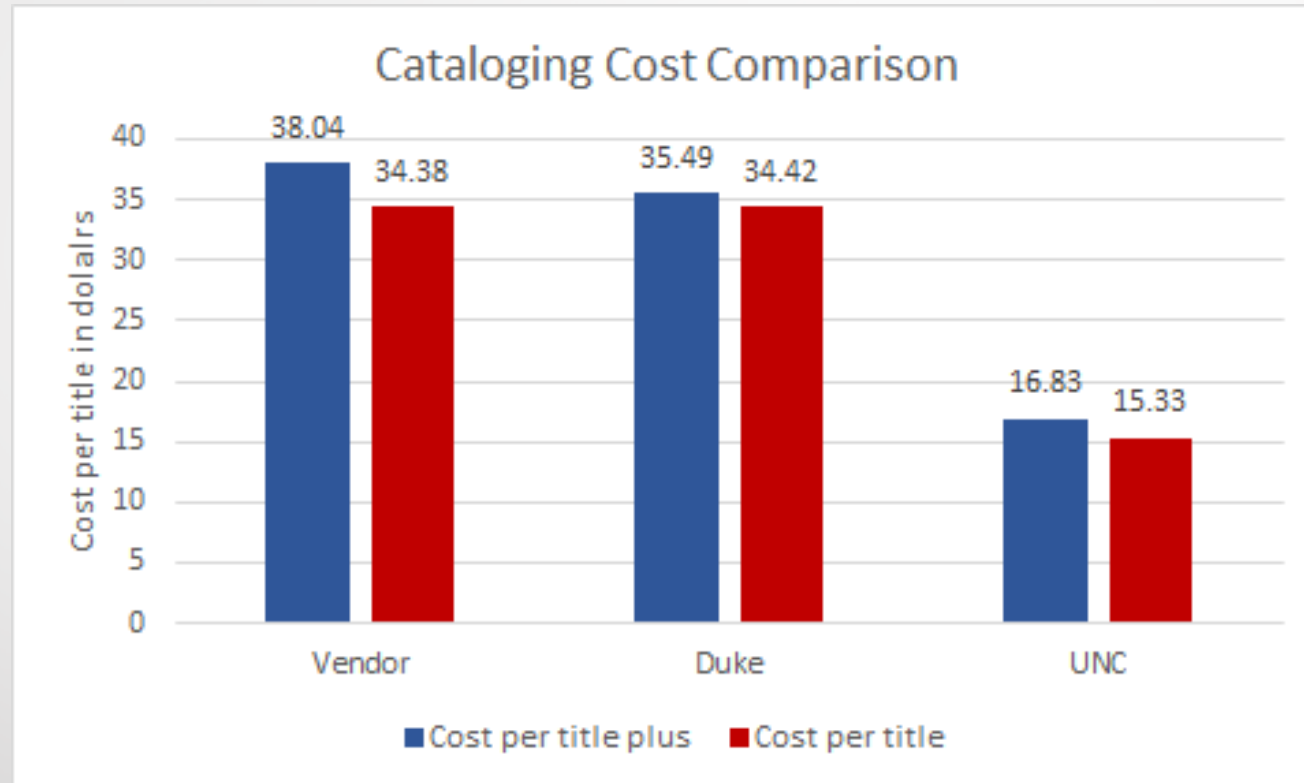
- Cataloging
- Scanning

#### Extras

- Quality control



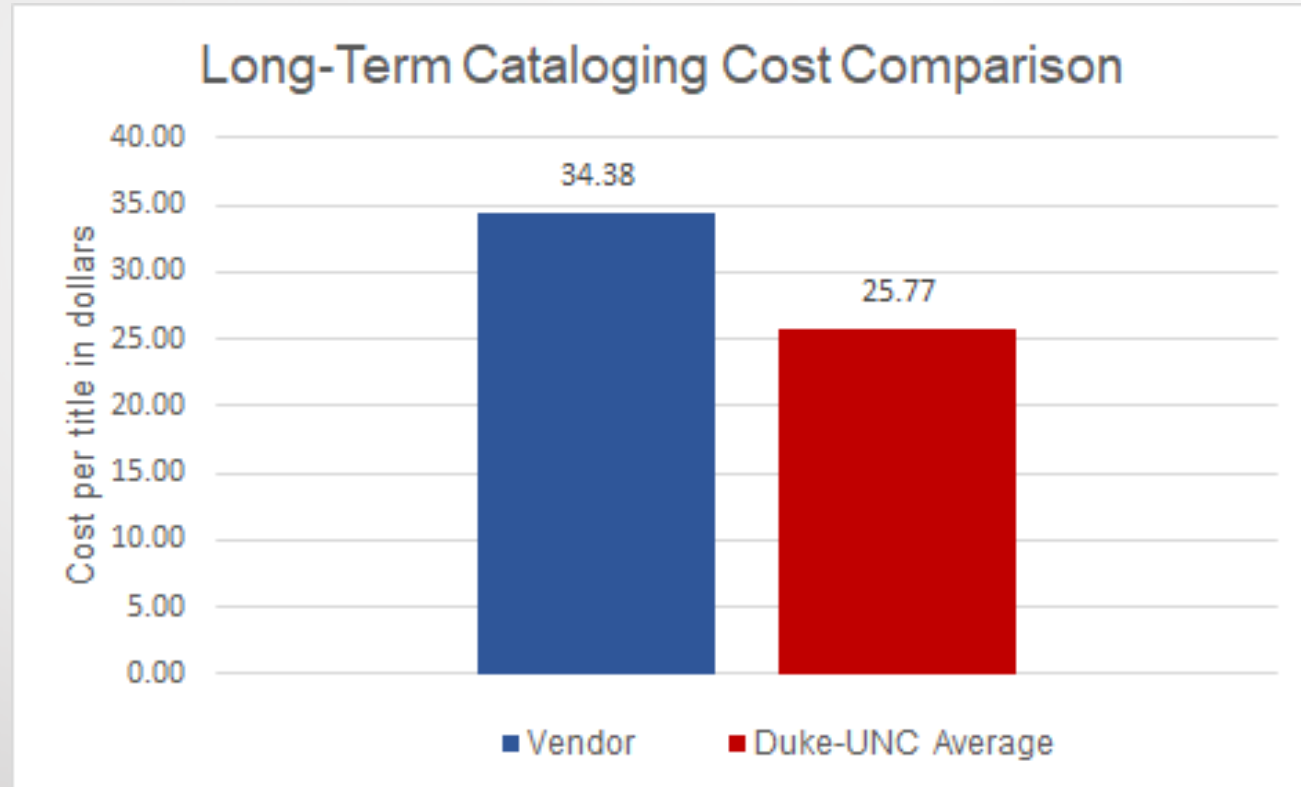
## Stage 3



*Vendor "cost per title plus" includes quality control.*

*Duke/UNC "cost per title plus" includes peripheral cataloging and quality control.*

## Stage 3



# Recommendations

## Benefits

- Lower costs
- Higher quality of cataloging
- NACO and PCC records

## Considerations

- Shipping out books
- Possible delays due to local needs
- Loss of a cataloger
- Unbalanced time spent cataloging

## Very important

- Project charter
- Agreement that outlines cataloging procedures and workflows
- Best suited to projects with defined scope and deadlines, so that supervisor can prioritize the work



# Acknowledgements

## At Duke

Dracine Hodges, Project Sponsor

Leeda Adkins

Amy Turner (now retired)

Fouzia El Gargouri

## At UNC

Christine Stachowicz, Project Sponsor

Wanda Gunther

Kim Allen

Christine Du

Jamie McGarty

Kristina Spurgin



## Questions?

Denise Soufi  
dsoufi@email.unc.edu

Nanako Thomas  
n.kodaira@duke.edu

Natalie Sommerville  
natalie.sommerville@duke.edu