

**BIBLIOGRAPHY ON OUTSOURCING
IN HERITAGE INSTITUTIONS
(LIBRARIES AND/OR MUSEUMS)**

**PREPARED FOR:
THE HERITAGE POLICY BRANCH
DEPARTMENT OF CANADIAN HERITAGE**

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Bibliography on Outsourcing in Heritage Institutions

INTRODUCTION

This bibliography on outsourcing in heritage institutions, with a focus on libraries and museums, was developed for the Arts and Heritage Branch of the Department of Canadian Heritage. It represents the first step in developing a discussion paper on outsourcing in Canadian heritage institutions.

The bibliography builds on the work of Keith Wickens, Policy Research Analyst with the Department of Canadian Heritage. At the time this project began, Mr. Wickens had already developed a significant bibliography on the subject and was generous enough to share it with us.

In preparing the bibliography, the following electronic databases were searched: ABI Inform, CBCA, New York Times archives (for news items), LISA, Wilsonline (for libraries), ERIC (specifically for information on schools), CARL UnCover, the University of Western Ontario online catalogue, AMICUS and other library online catalogues on the Web.

The following Web Sites were also searched: American Library Association, Special Library Association, Amazon.com, The Internet Public Library, StatsCan, and numerous museum, library and school sites that were located via standard search engines on the Web.

The search terms used included: Contracting Out, Outsourcing, Privatization, Cost Control, Cost Reduction. These terms were combined with terms such as schools, museums, government, libraries, technical services, information technology, cataloguing and administration.

The following conclusions can be drawn from an initial review of the material:

- * outsourcing is here to stay
- * the main activities that are outsourced are non-core activities
- * the main concerns for an organization that is considering outsourcing are:
 - loss of control,
 - loss of competencies,
 - privacy,
 - confidentiality, and
 - quality issues
- * the procedures for managing outsourcing are extremely varied, so case studies are useful
- * the benefits of outsourcing are widely discussed in the literature
- * the major problems discussed in the literature deal with
 - deciding whether or not to outsource
 - deciding which types of services to outsource
 - developing practical procedures in organizing outsourcing efforts

The broad range of sources cited in this bibliography provides a diversity and variety of information that is intended to meet the needs of the many stakeholders in the heritage institution community.

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Principals, ASM Advanced Strategic Management Consultants

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1. OUTSOURCING - GENERAL

1.1 BIBLIOGRAPHIES

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Hirshon, Arnold, and Barbara Winters. 1997. *Bibliography on Outsourcing. Outsourcing Library Technical Services: How to Do-It Manual for Librarians*, 161-164. NY: Neal Schuman Publishers, Inc.

Johnson, Peggy, ed. 1997. *Bibliography. New Directions in Technical Services: Trends and Sources* (1993-1995). Chicago: ALA.

1.2 GENERAL

Bush, Carmel C., et al. 1994. *Toward a New World Order: A Survey of Outsourcing Capabilities of Vendors for Acquisitions, Cataloging and Collection Development Services. Library Acquisitions: Practice and Theory*, v. 18, no. 4: P 397-416.

Calabrese, Alice. Wozny, Jay. 1995. *The CLS bottom line: it's more than money, it's service* (Chicago Library System). The Bottom Line v 8 no2. P 18-22.

Coleman, Patricia M. 1991. *Income generation and cost recovery: experience in two British libraries [Sheffield and Birmingham public libraries]. The Economics of library and information services*. Anglo-German Foundation for the Study of Ind. Soc. P 183-94.

Collins J. S. 1995. Information Resources Management Journal. 8 (1) Winter. P 5-13.

A survey was mailed to the chief information officers of the 500 largest industrial firms in the USA to investigate outsourcing of information systems. The results from the 110 responses received indicate the extent and effects of outsourcing among users of such services. The survey also collected data about the outsourcing plans of nonusers. The survey provided information about the planning and implementation issues encountered, benefits achieved, and impact on performance. This study is a benchmark of current outsourcing practice. In addition, tests some commonly accepted assumptions about the reasons for outsourcing, and the effects of outsourcing on the firm.

Coopers & Lybrand. 1996. *Valuing the Economic Costs and Benefits of Libraries*. New Zealand Library & Information Association.

Cram, Jennifer. 1995. *Moving from cost centre to profitable investment: managing the perception of a library's worth (presented at Asia-Pacific Library Conference, Brisbane, 28 May-1 June 1995. Australasian Public Libraries and Information Services*. v 8 September: P 107-13.

Crismond, Linda A. 1994. *Outsourcing from the A/V Vendor's Viewpoint: the Dynamics of a New Relationship. Library Acquisitions: Practice and Theory*, v. 18, no. 4, (1994): P 375-381.

Cronk J.; Sharp J. 1995. *A framework for deciding what to outsource in information technology. Journal of Information Technology*. 10 (4) December: P 259-67.

Contribution to a special issue devoted to outsourcing information systems. Examines the theory and background of outsourcing from a general perspective. A strategic framework should be developed to make it possible to determine which information technologies activities should be outsourced and which should be obtained internally.

Coulter, Jane (ed) 1994. Doing More With Less? Contracting Out and Efficiency in The Public Sector. PSRC Collected Papers No. 1, Public Sector Research Centre, University of New South Wales.

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Currie W. L. 1996. *Outsourcing in the private and public sectors: an unpredictable IT strategy*. European Journal of Information Systems. 4 (4) February: P 226-36.

Considers the literature on information technology outsourcing in both private and public sector British and American organization. Introduces the results from a questionnaire survey of 200 UK private and public sector organization on information technology outsourcing. Looks at the proportion of organizations that use outsourcing, how contracts are negotiated and the type of information technology solutions preferred by information technology managers.

Dwyer, Jim. 1994. *Does Outsourcing Mean You're Out?* Technicalities, v. 14, no. 6, (June): P 1, 6.

Evans, John E. 1995. *Cost analysis of public services in academic libraries (abbreviated version of author's doctoral thesis)*. Journal of Interlibrary Loan, Document Delivery & Information. v 5 no.3. P 27-70.

Intner, Sheila S. 1994. *Outsourcing: What Does it Mean for Technical Services?* Technicalities, v. 14, no. 3, (March): P 3-5.

Jones. W 1997. *Outsourcing basics*. Information Systems Management. 14 (1) Winter 97: P 66-9.

Sets out the components of a sound outsourcing evaluation. Covers: asking the right questions, knowing what outsourcing is, establishing sound reasons for outsourcing, weighing advantages and disadvantages, managing the people issues, using a competitive methodical approach, considering all stakeholders, understanding the vendors, negotiating a sound contract, encouraging user ownership of the outsourcing concept, managing the relationship with a retained team, and acting quickly.

Nichols, John V. 1993. *Cost sharing and public libraries [Oshkosh Public Library]* Against all odds. Highsmith Press. P 29-41.

Martin, Murray S. 1995. *Outsourcing (implication that the private sector can provide many services more economically than the public sector)*. The Bottom Line. v 8 no. P 28-30.

Mielke, Linda 1990. *Cost finding: why it is important (per unit costs for a specific service, e.g., adding gift books to your collection)* Public Libraries v 29. September/October: P 282-8.

Mielke, Laurie R. 1991. *Sermon on the amount: costing out children's services (revision of paper presented at the ALA Conference, June 1990)*. Public Libraries v 30. September/October: P 279-82.

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Robinson, Barbara M. 1990. *Costing question handling and ILL/photocopying: a study of two state contract libraries*. The Bottom Line (ISSN:0888-045X) v 4, Summer: P 20-5.

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Rubin H. A. 1997. *Using metrics for outsourcing oversight.* Information Systems Management 14 (2) Spring 97, il.tables.refs. P 7-14.

For the benefits of outsourcing to accrue, information systems managers must implement a proactive, forward-looking oversight mechanism designed to ensure that the outsourcing provider operates in a performance zone that provides the expected business value. Outsourcing oversight metrics, key performance-monitoring parameters built into the outsourcing agreement and assessed on an on-going basis, form the basis of such a mechanism.

Simon, Margaret. 1991. *Cost containing collaborations (nearby art school offers free design service.* Ohio Libraries (ISSN:0360-8069) v 4 p 18 March/April.

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Stokes, Deborah. 1998. *Consider the (out)source.* The Financial Post. April 25: P 31.

Weaver, Barbara F. 1993. *Outsourcing - A Dirty Word or a Lifeline?* The Bottom Line Managing Library Finances, v. 7, no. 1, P 26-29.

Weingand, Darlene E. 1992. *Marketing and financial management: keys to fiscal accountability in the public library.* Keeping the book. Highsmith Press. P 307-16.

Winters, Barbara A. 1994. *Catalog Outsourcing at Wright State University: Implications for Acquisitions Managers.* Library Acquisitions: Practice and Theory, v. 18, no. 4. P 367-373.

Yesulatitis J. A. 1997. *Outsourcing for new technology adoption.* Information Systems Management 14 (2) Spring 97. refs. P 80-82.

Offers advice to corporate information systems executives on leveraging the advantages of outsourcing for new technology adoption. Sets out a strategy for: identifying organizational needs, outsourcing to fit organizational needs, implementation, and finding outsourcing partners.

Zagami, Anthony J. 1991. *Memorandum: "Cost sharing" for the dissemination of government information in electronic formats* (interpretation of the General Counsel of the U.S. GPO of a memorandum issued by the Public Printer, March 25, 1991. Government Information Quarterly (ISSN:0740-624X) v 8 no 4. P 387-91.

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American Association of Museums. <http://www.aam-us.org/text/index.html>

Chapman Tripp Barristors & Solicitors, New Zealand. <http://www.chapmantripp.co.nz/publish/itoutsou.htm>

Chubb Insurance for Businesses, Museum Notes. <http://www.chubb.com/library/notes97.html>

Dollars & Sense - How Outsourcing can help Arizona Schools.
<http://www.alabamafamily.org/pubs/dollars.html>

Demetra Smith Nightingale and Nancy Pindus. 1997. The Urban Institute. Privatization of Public Services - A Background Paper. <http://www.urban.org/pubman/privitiz.html>

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In the Ring. GovExec.com - Management. <http://www.govexec.com/features/0997s1.htm>

Museum Digital Library Collective. <http://www.museumlicensing.org>

National Library of Australia - Gateways. <http://www.nla.gov.au/ntwkpubs/gw/31/31.html>

The Outsourcing Institute, New York. <http://www.outsourcing.com>

Technical issues that confront museums on the Web.
<http://www.gii.getty.edu/papers/museumweb/technical.html>

University of Arizona Libraries - Current Situation.
<http://dizzy.library.arizona.edu/library/teams/slrp/csa/csa-html/libworld.htm>

3. GOVERNMENT AND OUTSOURCING

3.1 GENERAL

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Chi, Keon S. 1998. *State Trends*. State Government News, January/February 1998. P 38.

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Although there is broad agreement that more and better information technology (IT) can produce government efficiencies and provide long term savings, short term budgetary constraints are making such investments extremely difficult. At minimum, the current fiscal stress demands implementation of creative alternatives for funding such projects, bringing into focus some budgeting opportunities which should not be overlooked. Examines the relationship between IT planning and budget formulation, use of the franchise fund concept newly implemented in a pilot project by the US Office of Management and Budget, and cost implications for outsourcing or privatising the IT function.

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OECD. 1997. Contracting Out Government Services: Best Practice Guidelines and Case Studies. Occasional Papers No. 20. 95 pp.

Piede D. L. 1996. *Restructuring internal services: perspective from the energy utility business*. Information Systems Management. 13 (1) Winter 96, P 12-17.

Deregulation compelled the energy utility business to restructure its inwardly directed culture and its overgrown and rivalrous internal services function. Discusses how it reorganized its internal services to achieve competitive advantage. New approaches to internal services were developed, including outsourcing. Examines standards, policy, and control issues.

Perry W. & Devinney S. 1997. *Achieving quality outsourcing*. Information Systems Management. 14 (2) Spring 97, P 23-6.

Outsourcing presents quality challenges in the areas of vendor selection and products and services received. Procedures must be established to thoroughly assess the vendor's competency and process discipline. Also quality must be ensured through the requirements definition process, implementation of a formal change management system, and the linking of outsource milestones with quality reviews.

Raphaelson, Arnold H. (Ed). 1998. Restructuring State and Local Services : Ideas, Proposals, and Experiments. Praeger: Westport Conn.

Under pressure from both the Federal government and private citizens, local and state governments are restructuring their services, including the areas of education, highway, and transportation. While the federal government wants to reassign responsibilities to local governments, voters want greater efficiency and lower taxes via privatization. This edited collection considers these pressures, the responses from state and local governments, and specific experiments in privatizing local services. Arnold H. Raphaelson is Professor of Economics at Temple University.

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Cassidy, Gordon. 1994. Contracting Out. Kingston: School of Policy Studies, Queen's University.

Chandler, Timothy; Feuille Peter, 1991. *Municipal Unions and Privatization* Public Administration Review. Vol.51 1, No. I. P 15-22.

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Boorsma, Peter B., Annemoon van Hemel; Niki van der Wielen (eds). *Privitization and Culture - Experiences in the Arts, Heritage and Cultural Industries in Europe*. CIRCLE Publications No. 10 - Kluwer Academic Publishers - Dordrecht, 1998.

This book focuses on European experiences in the performing arts (theatre and opera), heritage (museums and built heritage) and cultural industries (film and television broadcasting and the book industry). It attempts to shed some light on the development of privitization through a series of contributions written specifically.

Peter Boorsma provides an up-to-date insight into privitization in the cultural sector by outlining its recent history and background, and discusses the definitions and the various modes of privitization and its consequences for cultural policy and development in Europe. David Throsby in "Re-thinking the State's Role" looks at the changing role of government and the implications this has for cultural institutions, artists and consumers. Mark Schuster in "Beyond Privitization" analyses privitization initiatives in the built heritage and museum sector. Trends in privitization in different countries are analysed by Cas Smithhuijsen, who emphasizes the need for a large "Third Sector". The book also includes a series of case studies by contributors from France, Italy, Hungary, the Czech Republic and the UK.

Davies, Stuart. 1996. *Mission Impossible*. Museums Journal, Volume 96, No. 6, 1996, P 38.

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This work offers a glimpse into major and controversial changes at the Glenbow Museum in Calgary, Canada. Many such cultural institutions in North America have faced, or will be facing, organizational and economic challenges in the immediate future; this book provides an in-depth description and analysis of newly evolving management techniques and practices applied to the museum environment to meet these challenges. Layoffs, staff-management relations, budget constraints, sustainability, and expanding earned income opportunities are here, couched in non-bureaucratic language.

Marzolf, Helen. 1997. *New Deal for Museums: Opportunities or Threats*. Muse, Volume 14, No. 4, P. 65, 67

Mintz, Ann. 1994. *That's Edutainment*. Museum News, Vol. 73, No. 6, P 32-35.

Moore, Kevin (Editor). 1994. Museum Management. Routledge.

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Faced with the challenges of shrinking funds, increased competition, and changing audiences, museums have recognized that inspired management is key for survival and prosperity. Papers offered here address important topics such as marketing, finance, human resources, and performance measurement.

Resource Report. 1996. Museums And Consultants: Maximizing The Collaboration. American Association of Museums.

An important report for any museum that has considered contracting for services for projects that range from a one-day facilitation to comprehensive, multi-faceted consultation. Articles cover a complete review of the process, from preparing the request for proposals to evaluating the consultant. Designed to help museums understand all aspects of consulting services, the report contains articles on: choosing a consultant; involving the board; defining goals; building a productive relationship; ethics; copyright; distinguishing between an employee and a contractor; and locating a consultant. This report contains handy charts and checklists for requests for proposals, contracts, consultant interviews, and proposal evaluation.

Rivard, Rene. 1997. *Museums: Growth or Metamorphosis*. Muse, Volume 14, No. 4, P 60-61.

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obtaining information about staffing and materials expenditure, processing and cataloguing statistics; and how this information was used to perform the cost benefit analysis. Interviews with public libraries already using outsourcing, a literature review and a SWOT (Strengths, Weaknesses, Opportunities, Threats) study were conducted to identify issues. Concludes that outsourcing represents both a threat and an opportunity and its potential will vary according to situation and to library. Competition will increase between vendors and some library staff may lose their jobs. Whatever the situation, outsourcing will change the way in which the library operates.

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Facing a major budget crunch, the Hawaii State Public Library System awarded a five and one half-year, \$11.2 million contract to a vendor (Baker & Taylor) for collection development. Hawaii librarians argue that outsourcing sacrifices local expertise and a central part of their professional identity. Discusses the controversy from opposing points of view. (PEN)

Ogburn Joyce L. 1996. *An Introduction to Outsourcing*. Library Acquisitions: Practice & Theory 18, 4: P 363-366.

Ogburn J. L. 1994. *Introduction to a special section on outsourcing (contracting out)*. Library Acquisitions: Practice and Theory. 18 (4) Winter 94, P 363-6.

Discusses the contracting out, by libraries, of technical services, such as cataloguing, to specialized commercial organizations (vendors). Considers outsourcing as a business strategy and looks briefly at the implications for acquisitions and collection development. Concludes that, as with other business arrangements, preliminary steps before considering outsourcing, such as defining quality and the expectations of both parties, must be taken. Acquisitions librarians and collection development librarians have extensive experience with managing contracts with vendors but also have to think in new terms and develop new relationships, with vendor services expanding. Acquisitions librarians have many skills to offer in managing outsourcing arrangements, and general management and leadership abilities will still be necessary both for the staff working within the library and the contract services.

Ojala M. 1996. *Outsourcing or ouch-sourcing?* Library Manager. (15) Feb 96, P 29. il.

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Looks at ways in which libraries can cope with the prospects of the outsourcing of some or all of their services. Highlights the need for awareness of the strengths and weaknesses of the library operation; paying attention to changing attitudes of people in the parent organisation; and maintaining flexibility in management. Taking a proactive stance by outsourcing functions not within the library's core competencies will be seen as good management, and should forestall attempts at further inroads into services: however, such efforts need to be combined with promoting the subsequent increased efficiency to the clients.

Olson, Rene. 1996. *Hawaii's Newest Volcano: Dissent Erupts over Outsourcing*. School Library Journal (November 1996): P 10- 11.

Outsourcing Book Selection Cataloging in Hawaii: A Critical Examination. 1997. Counterspace, Volume 1, No. 4, October.

Paul, Analee. 1991. *Contract storytelling (informal contract for preschool storytime in the Anderson Community/School Library)*. The Sourdough v 28 P 14-15 Summer.

Player, Jewell A. 1998. Lessons Learned - Contracted Out. (synopsis of report to the ALA Outsourcing Task Force), January.

Porter, Tim. 1994. *Hereford and Worcester: external facilities management of cultural activities in libraries*. Public Library Journal. v 9 P 97-8. July/August

Portugal, Frank. 1997. Exploring Outsourcing: Case Studies of Corporate Libraries. "An Executive Summary. Special Library Association.

Propas S. 1997. *Rearranging the universe: reengineering, reinventing, and recycling*. Library Acquisitions: Practice and Theory 21 (2) Summer 97, P 135-40.

Paper presented at the Feather River Institute 1996. Technical services at Stanford University Libraries is in the process of instituting major changes in its organization and in the way it receives and processes materials. These changes depend on outsourcing, more use of current technology, and on decentralizing many processes. Describes the first of the major changes instituted in the monographic receiving area and looks forward to the changes coming in the future.

Quint B.; Coffman S.. 1996. *Library-to-library outsourcing: interview with Steve Coffman*. Searcher 4 (8) Sep 96, P 24-31.

An interview with Steve Coffman, director of the County of Los Angeles, USA, Public Library's FYI service which is a fee-based service that supplements and replaces services by other libraries. Covers the rationale and operation of the system which is focused on providing services to other public libraries and a strategy of building information products. Introduces FASCAL which is a de factor organization of fee-based information in both public and academic libraries. Examines private and public competition for outsourcing, and the role of special libraries.

Quint, Barbara. 1996. *The "O" Word Issues in Outsourcing*. Searcher: The Magazine for Database Professionals. May: P 8.

Rajkovic, Marianne 1997. Outsourcing Technical Services : City of Sydney's Experience A discussion paper, presented at a seminar on outsourcing library technical services, organised by the Public Libraries Branch at the State Library of New South Wales on Monday 4th August.
<http://www.slnsw.gov.au/plb/confer/outsrc/outsourc.htm>

Reuben, Richard C. 1995. *Baker & McKenzie shelves librarians: library professionals worry bargain-hunting firms will look to outsourcing*, ABA Journal, v.81, July, p26.

Rothery, Brian and Ian Robertson. 1995. The Truth about Outsourcing. Gower.

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Saint-Onge, Michael. 1995. *Outsourced law library serves as a wake-up call; librarians who fail to show how they contribute to the bottom line may find themselves shelved*, The National Law Journal, v17, n46, July 17, P C3, col 1. <http://library.ljextra.com/onge.html>

Schneider, Karen G. 1998. *The McLibrary Syndrome*. American Libraries, January. P 66-70.

Schuman, Patricia Glass. 1998. *The selling of the public library*. Library Journal. Aug 1998; vol. 123, N 13, P 50-52.

Schwalb, Sandy. 1997. *The Ins and Outs of Outsourcing: The Changing, Evolving Scene for Information Professionals*. Database. v20 n3 P 41-42,44-46 Jun-Jul .

Examines the trend toward outsourcing in libraries and presents views from information professionals in various work environments. Discussion covers privatization activities of government agencies and libraries as well as corporate libraries, particularly law firm libraries. The need for good library-vendor communication, the effect on public libraries, and examples of both successful and problematic outsourcing are also highlighted.

Scrimgeour, Andrew D.; Potter, Susan. 1991. *The tie that binds: the role and evolution of contracts in interlibrary cooperation* [Loveland Public Library services to Regis University students]. Off-campus Library Services Conference (5th: 1991: Albuquerque, N.M.) The fifth Off-campus Library Services Conference proceedings. Central Mich. Univ. Press. P 241-54.

Secor J. R 1997. *Library/vendor relationships - focusing on the university presses' need to collaborate with librarians and their vendors*. Against the Grain. 9 (1) Feb 97, P 38-9, 66.

Scholarly publishers and, in particular, university presses, need to establish collaborative relationships with libraries and their vendors, and to change practices to bring them in line with increasing customer expectations. University presses should focus on the changed library/vendor environment. They should not see approval plans as a vehicle to sell more books but as a way of adding value to services. They should stop competing with vendors. Vendors are increasingly providing added value and outsourcing services.

Seitz, Robert. 1998. *Outsourcing helps library meet demand*. The American City and County. Vol. 113, n 5, P 72.

Siess, Judith-A. 1997. The SOLO Librarian's Sourcebook. Information Today, Inc.

This book provides an introduction to single staff information services, or SOLO librarianship. SOLO librarians are usually found in corporate libraries, private companies, small public libraries, museums, schools, churches or synagogues, prisons, law firms, hospitals or special libraries with specialized or limited materials and services with emphasis is on providing information, rather than books. A list of resources is presented that will come to the aid of the SOLO librarian. In 1991, the author helped establish the SOLO Librarian Division of the Special Libraries Association. The book is divided into two parts. Part 1, "Who We Are" (Chapters 1-7) focuses on a sample week in the life of a SOLO librarian; management issues; outsourcing and downsizing; SOLO libraries abroad; education for SOLOs and others; technology and the SOLO librarian; and the future of SOLO librarianship. Part 2, "Resources" (Chapters 8-12) highlights organizations; a SOLO's guide to education; vendors and suppliers; books and journals; and Internet sites and listservs. Appendices include: the Library Education Questionnaire; a detailed analysis of questionnaire responses; SOLO librarian survey; and demographics: results of surveys. (AEF)

Shirk, Gary M. 1994. *Outsourced Library Technical Services: The Booksellers Perspective*. Library Acquisitions: Practice & Theory 18, 4: P 383-395.

Smith, Flora. 1993. *Compulsory competitive tendering: not me? Yes you (Scottish CIGS seminar, February 1993)*. Catalogue & Index (ISSN:0008-7629) no108 P 7 Summer.

Smith V. T. 1996. *Library mission: embracing change in the year 2000*. Journal of Educational Media and Library Sciences. 33 (3) Mar 96, P 281-8. refs.

Predicts that the year 2000 will be a time of transition and fundamental change as libraries strive to provide effective information for users throughout the library community. Currently, the core function of libraries is to identify, acquire,

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preserve, and provide access to information. Technical services librarians will become central to the mission of libraries throughout the world. The challenge is to provide resources for a broad range of disciplines and an ever expanding and diverse population of users. Librarians must lead their community in its changing mission. Reviews the role of technical services in the coming decade, specifically, the services and resources most relevant to a changing library environment. This includes outsourcing in all its aspects (such as OCLC's Techpro service), interactive multimedia, format integration, electronic resources, quality control standards, and relevant technologies. Explores the need for proactive communication and discusses the reengineering of the library as an entity, due to decreasing resources, as well as the ever changing role of the technical services librarian as libraries are restructured.

Smith S. A; Brumley R. 1996. *Prioritizing firm order costs and vendor services*. Library Acquisitions: Practice and Theory 20 (1) Spring 96, p.57-63. tables.

Presents the methods and results of an exercise in which conference participants were 'transformed' into bookselling companies, given a compilation of financial data and asked to develop business plans. The companies were expected to increase the contribution earned, maintain competitive service, consider the realities of the market and make decisions that reflected the values deemed important by the 'employees'. One goal of the exercise was to introduce acquisitions and collection development librarians to the complexities and ambiguities of the business decisions faced by vendors. Another was to prepare librarians for the negotiations associated with outsourcing.

Southwood. J. 1995. *Outsourcing your information resources*. Records Management Journal 5 (2) Dec 95, P 101-13.

Examines the business practice of outsourcing. Explores the reasons for adopting this approach and the range of types of outsourcing arrangements. The whole process is examined from evaluation of the service to be outsourced to consolidation. Discusses how the records manager should deal with this by seeing it as an opportunity rather than a potential threat. The author's company, Britannia Data Management Ltd, is currently responsible for the records of the Immigration and Nationality Department of the UK Home Office, which involves the management of some 30 staff and the storage and retrieval of over 4 million records.

St. Lifer, Evan, and Michael Rogers. 1997. *CA PL First to Outsource all Operations to Private Vendor*. Library Journal, (July 1997): 12.

Thomas, Barbro. 1996. Contracting Out Of Public Libraries. Paper presented at the 62nd IFLA General Conference, Guimaraes, Portugal, August 25-31. <http://www.ifla.org/ifla/IV/ifla62/62-thob.htm>

Thomas S. E. 1996. *Quality in bibliographic control*. Library Trends 44 (3) Winter 96, P 491-505. refs.

Article included in a special issue devoted to the theme: Perspectives on quality in libraries. The quality of cataloguing is an issue that has engendered much discussion over decades of bibliographic control. Juxtaposed against the standard of full, accurate, and timely bibliographic records is the pressure to produce reliable access in a cost effective manner. In reviewing the definition of quality at the Library of Congress (LC), the relationship between quality cataloguing to copy cataloguing, minimal level cataloguing, the core bibliographic record, and outsourcing, concludes that the definition of quality is dynamic and dependent on the values and needs of catalogue users

Tyerman, Karen. 1994. *Brent: management by contract and market testing*. Public Library Journal v 9 P 95-6 July/August '94

Varner, Carroll H. *Outsourcing Library Production: The Leader's Role*. Proceedings of the ACRL 7th National Conference, P 445-449.

Waite, Ellen J. 1995. *Reinvent catalogers!* (reply to M. Gorman). Library Journal v 120 P 36-7 Nov 1.

Walker, Thomas M. 1996. *Outsourcing: a Customer's Perspective on the Process and the Potential*. The Bottom Line: Managing Library Finances, v. 9, no. 2: P 14-17.

Many public library administrators are being forced to look toward outsourcing as a way of securing critical support services. Describes the use of cataloguing outsourcing services by Charleston County Library, South Carolina and explains the various methods employed by vendors to transmit cataloguing data to customers. Provides practical

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suggestions for those considering an outsourcing arrangement, with solutions for offsetting the cataloguing quality shortcomings inherent in some outsourcing practices. Concludes that with proper planning and vigilance, outsourcing can produce a quality product, and one that will allow the technical services staff the time needed to construct a unified index for the library's multifarious materials and information sources.

Weaver B. F. 1993. *Outsourcing a dirty word or a lifeline?* Bottom Line, 7 (1) Summer 93, P 26-9. il.

Describes how state libraries in New Jersey and Rhode Island have cut costs by contracting out interlibrary loan van delivery services which form part of regional support activity. The service is now more reliable, considerably cheaper and able to deliver to a greater number of sites. Rhode Island is also contracting out the warehousing, shipping and inspection functions of its Regional Library for the Blind and Physically Handicapped; this is expected to have significant long term benefits.

White, Herbert S. 1998. *Library outsourcing and contracting: Cost-effectiveness or shell game?* Library Journal. Jun 15. V 123, n 11. P 56-57.

Wiegand, Wayne A. *The politics of cultural authority*. American Libraries, January 1998. pp.80-82.

Wilhoit, Karen. 1994. *Outsourcing cataloging at Wright State University*. Serials Review. v 20 no3 P 70-3

Willcocks L.; Lacity M.; Fitzgerald G. 1996. *To outsource IT or not?: recent research on economics and evaluation practice*. European Journal of Information Systems 5 (3) Sep 96, p.143-60.

Reports from 26 longitudinal case studies of information technology outsourcing research in the 1993-95 period. Focuses on evaluation practices in the lead up to making information technology sourcing decisions. Highlights difficulties experienced in evaluating in house performance. Explores issues and details organizational experiences on assessing vendor bids against in-house options. Presents a rich picture representative case study, together with additional lessons derived from the research. Highlights the emerging evaluation approach shared by organizations that made effective sourcing decisions.

Willett, Charles. 1998. *Consider the source: a case against outsourcing materials selection in academic libraries*. Collection Building. Vol. 17, No.2. P 91-95.

Argues that outsourcing approval plans to vendors creates a prejudice against the alternative press. Business is guided by the interests of corporate America rather than of providing exposure to all points of view. Argues that as the last truly free public space in America, library managers have a duty to make alternative materials available for use and to secure the independence, integrity and accountability of America's libraries.

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Contribution to a thematic issue on approval plans for acquisitions in academic libraries in the USA. In the current debates about 'reengineering' the library the primary focus has been on costs and organizational issues in technical services. The 'outsourcing' of technical services functions has profound implications for collection managers as the library approval plan is frequently at the core of support services sought from booksellers. The traditional approval plan offers most of the features necessary to preserve the integrity of the collection management function, but vendors and library selectors need to reexamine priorities and perspectives in the new organizational climate.

Woodsworth, Anne. 1998. *Outsourcing: A Tempest in a Teapot*. Library Journal, March 15: P 46.

Valauskas, Edward J. 1998. A Review of Privatisation. Paper presented at the 64th IFLA General Conference, Amsterdam, August 16-21. <http://www.ifla.org/ifla/IV/ifla64/188-139e.htm>