LIBRARY FUTURES: MERGERS, DOCUMENT AND INFORMATION MANAGEMENT IN DOWNSIZING ENVIRONMENTS[1]

When I saw the title for tonight's session, I was struck by some of the words in it. Futures ... mergers ... management ... downsizing. Terms that could be pulled from headlines in the business pages of the newspaper on any given day. And that isn't really coincidental. The forces that are driving the changes that we are talking about tonight are the same forces that are driving changes in all areas of the private and public sectors.

- reduced resources — what sector has been immune?
- new ways to compete — new ways to deliver programs or products in order to maintain or gain competitive edge
- need for a resilient workforce — cross-functioning, adaptable
- new breed of consumer or client — more knowledgeable, more self-sufficient, more demanding

And finally, perhaps most dramatic of all, the tremendous effect of the rapidly advancing information and communication technologies.

Tonight I will talk about downsizing and restructuring at IDRC and the reorganization that has taken place in the Library. I would like to focus on the delivery of information services and new approaches and initiatives we are trying now.

To begin, a little context.

IDRC is a crown corporation formed in 1971 to "initiate, encourage, support and conduct research into the problems of the developing regions of the world and into the means for applying and adapting scientific, technical and other knowledge to the economic and social advancement of those regions." From the beginning the emphasis was on the importance of information and the development of knowledge and the development of the capacity for generating and applying knowledge. The current mission statement, "Empowerment through knowledge" still reflects the original vision.

At its height, IDRC had a staff of some 650 based in a Headquarters Office in Ottawa and in regional offices around the world. Funding was stable. A fertile intellectual environment thrived and a highly professional, very busy Library developed.

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- A library staff of 22 offered proactive reference services to Program Officers, information support to projects, and dissemination of IDRC project information to researchers around the world;
- Library databases using Minisis were built and maintained to very high cataloguing standards;
- The Library played a key role in providing access to project results as abstracters summarized project information for a project database and the Library collected, indexed and disseminated final technical reports of projects;
- Current awareness and interlibrary loan services were offered and extensively used;
- A Development Data Bases Service was developed and offered on a free subscription basis, providing access in pre-Internet days not only to IDRC databases but also to a collection of databases of interest to the development community;
- An OPAC was developed and all IDRC staff had access from their desktop to the Library databases by 1991.

1992 brought dramatic changes to the Centre.

The first-ever downsizing was experienced — 20% across the board With this came reorganization, much institutional self-analysis, and revisiting visions and the means of delivering programs. The shake-up and its effect on staff was not over when 1995 brought further cuts — a second major review of structure and program delivery, and cuts: 20% reduction in operational costs and a 27% reduction in the number of positions to be accomplished by 97/98.

As we know, IDRC was not unique in what it was going through. It was right on track, in sync with the world around it — finding its way through the trends I mentioned at the beginning:
- strapped resources
- new ways to compete — IDRC had to find new ways to deliver programs in order to maintain its niche and to compete for funds
- need for a resilient workforce — by now IDRC had adopted a policy to hire no new staff on an indeterminate basis in order to maintain flexibility in skills and expertise
- new breed of consumer or client — more knowledgeable, more self-sufficient, more demanding

And like other organizations, it was looking more and more to the rapidly advancing information and communication technologies to help it maintain its position and remain viable.

With the cuts of 1992, the Library staff was cut from 22 to 17 though money was available to contract some services. Greater changes were needed in 1995. At this point we could no longer cut staff and maintain the status quo. After considering several possible scenarios, senior management chose the merger of the Library, Records, and Mail to be called the Research Information Management Service or RIMS. As it turned out we were part of a not uncommon trend.

One of the first challenges in this merger was a very practical one — space. The Library occupied an entire floor of the building and Records and Mail occupied a large chunk of the floor they were on. The physical integration was made possible partly by a rigorous weeding of the Library collection -- over 40 % of the collection was removed from the shelves.

The integration of the staff physically and organizationally went very smoothly. I don't think there is any question that the impact of the merger must have been greater on the Records staff. I'm sure that they felt they were losing something: their affiliation to their old division, their own space, perhaps their autonomy. And I think there was some fear that an appreciation of their function and their discipline was also being lost. Interestingly enough, all the Records and Mail staff, but one, were men and the Library, but for one person, were all women.

But as I said, the integration has gone smoothly and constructively and I think that it is a credit to the resilience and sensitivity of all staff and perhaps also due to the sheer workload. Once merged, everyone soon realized the work goes on and everyone pretty much kept up with their same responsibilities. And with all the changes in the organization, there was an increase in work.

Just a word about our structure before I go into some of the services. As I mentioned the workload at this point was very heavy. It always is, but with the organizational changes there were adjustments that had to be made in the management of information. So in order to maintain a continuity in service and to apply existing skill sets to the tasks at hand, there has been no attempt at this point to have cross functioning positions. What has changed is the reporting structures. RIMS is organized along the lines of direct services to users and technical services. So Records and Library staff fit into both sides. Records staff who work directly with the clients, filing, opening and retrieving files are in the users' services side with reference, interlibrary loans and circulation staff. The classification and retention/disposition functions of records, two people, report to the head of technical services.

So now we had this new Research Information Management Service with

opportunities for innovative approaches to information and delivery and staff dynamics. That was partly true. Like every change in life, there are two sides (at least!) Yes, there have been new projects and new ways of providing service and yes, there have been challenges of just keeping up: keeping up with the changes, the workload, the technologies, the possibilities. And as we know, changes, whether positive or negative, are stressful.

Cuts have been made in such a way as to not reduce noticeably the services to IDRC staff and projects. Reference librarians maintain a high level of proactive service to their clients building relationships and project knowledge. In a research organization this aspect cannot be compromised. Cataloguing staff have made attempts to streamline their efforts but with its unique collection (40% of it is corporate memory) and with retrieval provided in three languages, we do all original cataloguing using the OECD Macrothesaurus. Reductions in cataloguing output are due mostly to a reduction in acquisitions. For instance, the book budget went from $ 30k to $ 5k in one year. Another difference is that while at one time we had five full-time indexing positions, we now have one. Additional cataloguing requirements are met through contract services.

Contribution to the Centre project database, IDRIS, another important aspect of IDRC information delivery, has also been maintained.

Records experienced a workload surge in the wake of the reorganization. Departing staff left boxes of papers which had to be weeded or added to the corporate memory. Restructuring required re-classification efforts which are not yet complete. And our compressed space required that disposition plans be acted upon -- removing 600 boxes of records from the premises.

In all of this there has developed a new mutual appreciation on the part of Records and Library staff for the complexity and importance of their functions. And a better sharing of resources as each side makes discoveries of common areas of interest. There is still duplication but at least it is the subject of discussion and knowledge sharing. Some duplication will probably continue to exist in instances where dual purposes are served, for example preservation vs. dissemination.

Corporate memory maintenance has changed in the Centre in any case due to electronic information systems. For example, two of our most important historical project records are generated through information systems managed neither by the Library nor Records. Information management in general in all organizations is becoming more broadly diffused as all staff become knowledge workers and information managers.

I would like to highlight some initiatives which show the double-barreled

effects of Information and Communication Technologies and the new kind of client.

We are currently piloting a Current Contents on Disk service, bringing customizable Table of Contents services right to the desktop. User acceptance and adequate funding will be the deciding factors in the continuation of this service, but it has resulted from reduced dollars to continue subscriptions, the emergence of such services, networks, and the interest on the part of some users to access and package their own information.

Librarians as we know too are moving more to training and advisory roles and two initiatives in which this is taking place are a Media Monitoring project and the Internet. Briefly, media monitoring is the responsibility of the public information unit in IDRC which is not part of RIMS. But now with electronic monitoring services involving online searches of newspaper resources, the public information staff turned to librarians for their expertise in determining user needs, designing search strategies and assessing available sources.

RIMS staff are also very involved in the Centre presence on and use of the Internet. In addition to providing group training sessions and one-on-one coaching on the Internet, they are also active in three other key areas.
- RIMS maintains a "to the World" site on its Library Home Page. This is a collection of pointers to worldwide Internet resources of interest to the development community. You can imagine the time it takes to keep up with new sites and to ensure existing ones are still "live."
- Next RIMS staff assist in the design of Web pages for other groups in the Centre. Program delivery is now organized into clusters of projects or Program Initiatives (currently about 14) and each of these plus the several secretariats housed in the Centre have their own Home Pages and many call upon Library staff to assist in the organization and linking of their information.
- And thirdly, library staff use the Internet for the dissemination of project information so they provide archival documents in the library section of the Centre Web Site.

As another sign of the times, RIMS also charges for some of its services -- both Records and Library services. We have contracts with some organizations not affiliated with IDRC. We also charge for services beyond what are considered core library services to secretariats within IDRC. And we are charging for services and products from our audio-visual collections and for some Records services. These charges are in a cost-recovery vein rather than revenue-generating.

Finally, RIMS is leading a Centre-wide initiative to bring an electronic document management system to IDRC. Electronic document management brings document management and records management functionality to the desktop of the client. While giving them the tools to better manage and retrieve information, it also puts the responsibility for filing and contributing to the integrity of the corporate memory in their hands.

So, to go back to this evening's theme, I hope that I have described how IDRC has responded to the challenges being thrust upon all of us. Our merger of Library, Records and Mail and Courier provides us with the structure to manage the information from the point of entry into the organization through to its disposition. The tools being provided through the advances in information and communication technologies allow us to maximize the use and benefit of the information that enters and is generated by the Centre in order to help the Centre deliver on its mission of "Empowerment through Knowledge."

And the future? Well, I think that's what makes our field so interesting. We've all seen so many changes over our careers and we have been resilient and resourceful enough to grow with them. I'm not going to try to forecast the future tonight, but one thing I do know, the way things are going, the future will be here before we know it!

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