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Report of the ALCTS Creative Ideas in Technical Services Interest Group Meeting, American Library Association Annual Meeting, Las Vegas, 2014.

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REPORT OF THE ALCTS CREATIVE IDEAS IN TECHNICAL SERVICES INTEREST GROUP MEETING. AMERICAN LIBRARY ASSOCIATION ANNUAL MEETING, LAS VEGAS, 2014

A group of seventy-one people made up of librarians and LIS graduate students gathered for the 2014 Annual meeting of the ALCTS Creative Ideas in Technical Services Interest Group. Chairperson Lynnette Fields (Southern Illinois University Edwardsville) and Chair-Elect/Vice Chair Erin Leach (University of Georgia) began meeting virtually shortly after Midwinter to discuss a theme for the meeting. It was decided that because the discussions at Midwinter were so interesting and timely, we would continue that discussion, and use the same theme "Exploring the changing role of Technical Services in libraries." A call for moderators was posted in April 2014 to several listservs, and we received six proposals. Five of the proposals were accepted and the submitters contacted and asked to come up with talking points. Once this process was completed, the topics were distributed to several listservs and posted on the group space in ALA Connect.

Attendees chose tables based on their areas of interest. Attendees spent the first forty minutes of the one-hour meeting discussing the topics in small groups. A recorder was chosen for each group. Each table had copies of the talking points for all the participants. The talking points were a way to get the conversations started, but not all the talking points were discussed at each table. The meeting concluded with the recorders reporting on the discussions.

Challenges of Patron Driven Acquisition (PDA) Programs

Topic developed by and table facilitated by: Kelly Smith, Eastern Kentucky University Libraries
Recorder: Vanessa Walden, Marin County Free Library

Talking points:
- Budgeting
- Staffing and workflow implications for mediated PDA
- Metadata management
- Statistical challenges
- Public relations and outreach

The discussion began with a look at mediated versus automatic PDAs. In an automatic program, a purchase is made without any staff intervention, based on criteria negotiated and set with a vendor. A mediated program has some sort of staff intervention to make or stop a purchasing decision. Most libraries do a combination of both based on need and budget constraints. It was pointed out that management of mediated requests can be staff and time intensive.

It was noted that PDAs present some unique budget issues. Most libraries take money off the top of the general book budget, and cap purchase amounts. Most libraries do not charge the specific subject area. There seems to be a fear that selectors will create "personal" collections by making requests themselves

to generate purchases, but no one in the group had seen that actually happen. Because of the need for budget flexibility given the unpredictable nature of PDA programs, one academic library purchasing primarily via PDA decided to stop allocating by subject area anymore and to instead have one large monographs budget. Despite initial resistance from liaisons, the model has worked well for them.

The group also had a lengthy discussion on vendor profiles and record maintenance. A recommendation was made to pay close attention to creating the profile. It is very time consuming to find problems later and try to refine the profile after the initial load. Maintaining the profile is also important, and should be an ongoing task. There was a recommendation to limit publication year to the last two years to try to limit the number of records and to help stay within budget. Most libraries limit the publication date to the last five years. It was also suggested to pay close attention to the cost per item limit that is set with the vendor.   Many libraries start with a pilot project and then expand if the pilot was successful. Another recommendation was to analyze the data at regular intervals to determine the effectiveness of short-term loans versus purchases.

The discussion then turned to loading MARC records. Vendors provide the MARC records, but the institution is responsible for the management and deletion of the records. Some recommendations from the group regarding MARC records were: Use markers or a unique ID in the MARC record to identify PDA records; use an indexed field, unique location code, or 9XX field to differentiate between PDA purchased records and short-term loans. It was also pointed out that managing order records with the bibliographic record load is easy to do with the Innovative Interfaces Millennium/Sierra system, but not so easy with Voyager.

The Potential of Digital Objects and Collections to Open Alternative Paths for Technical Services Librarians
Topic developed by and table facilitated by: Rachel Jaffe and Stephanie Hess, Binghamton University Libraries
Recorder: Stephanie Hess

Talking points:
- Proliferation of employment opportunities for metadata/cataloging librarians, digitization experts, electronic resources librarians, etc.
- Direction of requisite skill set expanding to match the needs of digitization and preservation initiatives, i.e. familiarity with non-MARC metadata schema, digital preservation systems, ERMS, project management, etc.
- E-resource management trends in Technical Services and their impact on user services and public services staff expectations.
- Executing digitization/preservation projects by implementing new workflows within an evolving trans-departmental setting.

This group began their discussion with introductions among the participants and a brief statement on their interests with regards to digital objects and collections. It was noted that the term "metadata" appears in many job titles although the librarians are doing different jobs. The term "metadata" seems to appeal to administrators, and seems to help keep jobs in Technical Services. For most Metadata Librarians there seems to be a heavy emphasis on schema design and data loading. One participant noted that their job, with the title Metadata Analyst, was primarily focused on cataloging and they used a combination of traditional MARC plus approximately 30 different metadata schema plus descriptive standards. One participant noted the challenges of moving to BIBFRAME and providing more descriptive terms to use.

The discussion then turned to how institutions are transitioning to depositories, etc. In particular, how they are training support staff and motivating and/or reconciling those not interested in changing. One participant noted that they have worked training into the annual evaluation as goals that have become expectations and requirements. Someone else noted that they should emphasize the opportunity to grow and focus on team building within Technical Services. Another participant noted that new librarians might be more receptive to new ideas and making a fresh start.

One participant mentioned that their last job involved outreach and a public services component that was not popular with current Public Services personnel. Their current job was slanted toward Systems. Another participant described efforts to work with Public Services staff via a pilot project and to work with the various Schools. It was noted that at Binghampton University Libraries digital projects involve all the library departments. This led into a discussion on internal confusion over the role of Metadata Librarians, and the need to break down silos. One participant noted that faculty at their institution initiate projects, but don't really know who in the library is working on the projects. Communication was a big concern. The participants noted a need to develop better communication strategies when working with departments outside of Technical Services. A suggestion was to create a neutral group in which all departments can be represented and provide input while getting a better view of the big picture. It was noted that coordination and working toward a common goal is key. It was also stated that this is a new area for staff, and they need to be given time to get comfortable with new duties and responsibilities.

Taking Cataloging Skills Outside the Cataloging Department
Topic developed by and table facilitated by: Marcy Strong, River Campus Libraries, University of Rochester
Recorder: Evelyn Behar, Queens College

Talking points:
- What are the attributes or personality traits that many Cataloging librarians often possess?
- What are the skills that Cataloging librarians have acquired through their normal course of work?
- How can we use these personality traits and skill sets outside of our immediate departments? Can we collaborate with other library units to enhance access to non-MARC metadata?

- Can we expand our contributions even further than issues of metadata? What other kinds of support can cataloging staff provide that make use of their inherent skills?
- How can Cataloging librarians learn to advocate for themselves and their staff to be involved with projects or workflows outside the department?

The discussion began with a look at the personality traits of Cataloging Librarians. Many Cataloging Librarians tend to be quiet, introverted, detail oriented, good listeners, problem solvers, investigators, independent workers, patient, good teachers/instructors. They usually have good analytical skills, like structure and are adaptable. Most Cataloging Librarians acquire a variety of skills on the job, e.g., how to deal with technology and systems, information organization, collaboration skills, project management, metadata, and how to increase accessibility to resources.

The discussion then moved to how Cataloging Librarians can collaborate with other library units to enhance access to materials. One attendee noted a collaboration with Special Collections and Archives to process manuscript collections. The Cataloging Librarians' knowledge of resource description and discovery was essential to the success of the collaboration, and it was a good opportunity to learn new standards. Another attendee described a collaboration with preservationists to organize their documentation, so that it could be easily retrieved for future projects. One attendee trained Eagle Scouts to do simple copy cataloging to reduce the backlog. Another attendee helped organize a local tool lending library. An academic Catalog Librarian helped a small community library organize their collections.

Attendees noted that Catalog Librarians can also contribute in areas outside of metadata. Attendees mentioned doing Reference Desk shifts, collection development, Acquisitions, data base management, and assisting with the Institutional Repository. Assisting in usability study research and copyright research were also mentioned as tasks well suited to the skill set of Catalog Librarians.

The final topic of discussion was how can Cataloging Librarians advocate for themselves and their staff to be involved in projects outside of the Technical Services Department. One attendee suggested that volunteering for library committees and committees in the larger institution are good ways to make your presence known. Another way is to market yourself. Catalog Librarians know how to do research and organize the information, so they would be very good at collaborating on grant development. Becoming involved in projects outside of Technical Services takes strategic planning and learning the vocabulary. It was also noted that it is a good idea to keep your supervisor informed about any potential collaborative projects.

Cross-departmental Strategies for Eliminating Backlogs
Topic developed by: Brad Cole and Liz Woolcott from Utah State University
Table facilitated by: Liz Woolcott
Recorder: Josh Petrusa, Butler University

Talking points:
- How do you make the case for a specialized team?
- How do you identify and build a collaborative team?
- How do you develop and implement training sessions for multiple standards and tools?
- How do you develop workflows that work across multiple departments?
- How do you measure the impact of the work

The discussion started by talking about dealing with special collections backlogs. One participant noted that they established teams of three people from different departments to deal with chunks of the collection. Another participant spoke about a backlog project they worked on with volunteers. They looked at the skills that were available, and divided up tasks based on those skills. A participant spoke about using staff at service desks to sort thought boxes of grey literature looking for duplicates. One participant voiced concern about how to get help without making the problem worse. They had solicited help from public services staff on a project, but then had to take the project away from them due to the low quality of the work.

It was noted that staff should be trained with the bigger picture in mind so they understand the impact of their work. Backlog reduction projects should be done at quiet times of the year, when new materials are not coming into Technical Services. One participant noted that a union workforce can sometimes complicate matters when it comes to working across departments.

Most of the discussion focused on special collections backlogs, not weeding print backlogs. It was also noted that someone needs to set priorities before the projects begin.

How Do You Juggle Creative Ideas, the Skills Needed to Sustain and Successfully Launch These ideas, and Possible Fears About How These Ideas Will Entail Change?
Topic developed and table facilitated by: Jennifer Eustis, University of Connecticut
Recorder: Mary Lou Bouley, Smith College

Talking points:
- How do you juggle creative ideas and the skills needed to sustain and successfully launch these ideas?
- How do you mitigate possible fears about new ideas that might entail change?
- How or what steps are needed to bring creative ideas to fruition?
- When is an ideas creative?
- How do you evaluate a creative idea?

The group began by introducing themselves and discussing the problems they were all facing in light of the fact that many libraries and technical services departments have been reorganized recently, or are facing reorganization. The talking points were not specifically addressed.

A librarian from Vanderbilt University spoke about the recent reorganization of Technical Services. The Acquisitions Department has been eliminated and Technical Services is now divided between continuing or monographic materials. "Flex teams" were instituted in January, but that is not going as smoothly as was expected. The phrase "intelligent fast failure" was discussed.

A librarian from the University of Arizona reported on their reorganization that took place last year. Technical Services consists of two librarians and six staff. Everyone was involved in planning and cross training. Everyone documented what they did, and then they were interviewed to learn what tasks they did, and how much time they spent on each task. They have been taking baby steps and focusing on the positive.

An attendee from Kansas State University stated that communication is key, and Technical Services should market what they do. They market their department with an internal blog and a newsletter. They use these mechanisms to announce projects, what they have purchased, etc. Four librarians are responsible for disseminating the information, but they talk to everyone in Technical Services to gather the information.

The discussion then moved to the topic of space. It was noted that the ARL survey of library spaces looked at administrative and other spaces, but not Technical Services space. Attendees thought there was a lack of understanding of the space required for Technical Services. The attendee from the University of Arizona noted that they got space on the top floor of the library, but that location was based on work flow.

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