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# Report of the ALCTS Creative Ideas in Technical Services Interest Group Meeting. American Library Association Mid-Winter Meeting, Philadelphia 2014.

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**Cover Page Footnote**

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## **REPORT OF THE ALCTS CREATIVE IDEAS IN TECHNICAL SERVICES INTEREST GROUP MEETING. AMERICAN LIBRARY ASSOCIATION MID-WINTER MEETING, PHILADELPHIA 2014**

A group of forty-eight people made up of librarians and LIS graduate students gathered for the 2014 Midwinter meeting of the ALCTS Creative Ideas in Technical Services Interest Group. In July 2013, Chairperson Lynnette Fields (Southern Illinois University Edwardsville) and Chair-Elect/Vice Chair Erin Leach (Columbia University) met virtually to discuss possible topics for the meeting. It was decided that instead of choosing specific topics ourselves, as had been done in the past, we would choose a theme and then put out a call for moderators. The theme chosen for Midwinter 2014 was "Exploring the changing role of Technical Services in libraries." In September 2013, the call was posted to several listservs and we received three proposals. The three 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 recorder reporting on the discussion.

### **The Potential of Digital Objects and Collections to Open Alternative Paths for Technical Services Librarians**

Topic developed by: Rachel Jaffe and Stephanie Hess, Binghamton University Libraries

Facilitator: Lynnette Fields, Southern Illinois University Edwardsville

Recorder: Jacob Ineichen, University of Wisconsin-Madison (Graduate student)

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.

The discussion began by one attendee giving a very general overview of their digital collections workflow. At this library, the creation of digital collections is within the purview of the cataloging division. They have a formal process for proposing a digitization project and there is close collaboration

between the proponent of the project and the metadata librarian responsible for the project. An issue that was echoed around the table was the challenge of talking to IT staff. There is often miscommunication because everyone is not using the same vocabulary. Training was also discussed. Most of the training tends to be individualized, and project based. The need for close collaboration between technical services, archives and special collections was also a key issue. Much of the discussion centered on the library being the central place for digitization projects across the institution. Librarians can act as consultants and advisers to the faculty as they contemplate research projects, and work with them at the beginning of a project. They can not only advise on formats and metadata schemas, but can also curate and preserve the data.

The group also discussed workflow changes that have resulted from the proliferation of digital resources. Projects can differ widely based on the type and size of physical objects to be digitized. One attendee talked about a project they are doing with community input. Library staff are sitting down with community members and collecting metadata for a group of photographs. The project has been successful, but very labor intensive. Another attendee commented that they are having faculty supply their own metadata, and this is working very well for them. Another attendee mentioned that they are collecting user-generated content for collections in their institutional repository.

The group briefly discussed Electronic Resource Management Systems (ERMS) and some of the other problems associated with electronic resources, e.g. broken links. Sometimes the information about a problem doesn't make its way to Technical Services. One attendee mentioned that they have comment/error forms available from the records in their OPAC.

## Creating a SWAT (Strategic Work and Tactics) Team to Tackle Backlogs and Interdepartmental Projects.

Topic developed by and table facilitated by: Liz Woolcott, Brad Cole and Susanne Clement, Utah State University

Recorder: Susanne Clement

Talking points:

- How did you go about addressing large-scale projects in your library? We are particularly interested in projects that address cataloging and processing of special collection backlogs or adding metadata to thousands of digital files.
- Have you had success with identifying partners within your organization for addressing large-scale projects? If so, what worked and what did not?
- How did you develop workflows for different projects?
- How did you develop training for new and different projects?
- What incentives have you used to facilitate high output (productivity) from your team members?
- How have you measured outcomes and impact of new projects?

Utah State University Libraries had struggled for years with processing large backlogs in Special Collection and Archives (book cataloging and manuscript processing) and in Digital Initiatives (creating metadata for newly created digital collections). The Associate Dean for Special Collections and Archives was able to get the approval and funding to establish a 2-year temporary in-house processing unit to tackle these interdepartmental projects. Liz Woolcott started the table talk discussion by providing an overview of how USU Libraries came up with the idea of creating a SWAT Team, covering planning and hiring for a large-scale project; developing training modules for metadata creation, cataloging and processing; project planning and workflow; and quality control.

Using the USU SWAT Team project as a discussion background, attendees discussed in some detail the steps necessary to effectively plan and get administrative support for temporary large-scale projects. The discussion focused on identifying funding, making the pitch to administrators (if the idea is not originating with the administrators), appointing (or identifying) project leaders for the different work phases, and integrating temporary interdepartmental employees into the library culture. The group also discussed whether it would be possible to reorganize future processing workflows based on the lessons learned from large-scale interdepartmental projects. In addition to the large-scale SWAT Team project, the group also discussed how different libraries (or librarians) had used formal and informal project management techniques for their large-scale project of moving periodical collections to a new building, moving hundreds of thousands of volumes to off-site storage, and planning to tackle a very large cataloging project within a very short time frame with no additional staffing. There was general agreement that effective planning, identifying partnerships across the library, and clear administrative support is necessary if large projects are to succeed.

## Successful Collaborations Between Technical Services and Public Services

Topic developed by and table facilitated by: Stephen Brooks, University of North Carolina at Chapel Hill  
Recorder: Bruce Evans, Baylor University Libraries

Talking points:

- What challenges do technical services and public services departments face that can benefit from cross-collaboration? Are there specific tasks or roles in public or technical services that are especially “ripe” for cross-collaboration?
- Has a public service team member worked in your technical service department or vice versa? If so, in what role and how did it work out?
- Describe the balance between training required and the benefits realized from crossing departmental lines.
- What improvements did the public service team member bring to the technical services team or vice-versa?
- What did you learn from your colleagues through cross-departmental collaboration?

The discussion began with a look at public services staff helping out in Technical Services. One attendee stated that at their institution, graduate students from Reference help with troubleshooting links for e-resources. Another attendee commented that Public Services staff helped with a huge withdrawal project that was too large for the technical services staff to handle on their own. Training was done by

the Technical Services staff, and the project is going well. An attendee from a public library commented that their Public Services staff have been trained to change location codes, and can change locations when appropriate. One attendee's institution has Public Services staff do basic data maintenance, while another has a team that does the preliminary checking on problems that come through the e-mail Libcat-help. One attendee shared that technicians from Public Services were helping with problems resulting from a recon project. Another library used a grad student hired for the information desk to do copy cataloging. An attendee mentioned that a Public Services staff member had expressed a desire to catalog feature films, but it didn't actually happen, because the staff member didn't have the time needed.

Joint Technical Services and Public Services projects were also discussed. An attendee mentioned that they had Public Services staff on their RDA implementation team. This proved to be very beneficial, because the public services staff were able to tell them what the users wanted. Other collaborative projects mentioned were RFID and data conversion projects.

The discussion then turned to the benefits to the library of Public Services staff doing some technical services functions. One attendee from an academic library commented that this collaboration helps staff from other areas see directly how Technical Services work directly impacts the faculty and library users. Another academic librarian noted that having public services staff work with technical services inspires them to ask more questions about why things are done a certain way. One participant asked the group if anyone had performed bibliographic instruction. A cataloger stated that she did more bibliographic instruction than any of the reference librarians. Catalogers have in depth knowledge of the catalog and can often give additional searching tips.

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