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Technical Services Assessment in Pennsylvania Academic Libraries

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Why this topic?

- * 2011 PaLA CRD Spring Workshop with Megan Oakleaf as keynote speaker
- * *The Value of Academic Libraries: A Comprehensive Research Review and Report* (Chicago: Association of College and Research Libraries, 2010)
- * There are 22 recommendations for next steps for librarians who wish to demonstrate value

Recommendation: Mobilize library administrators (1)

- * Communicating **assessment** needs and results to library stakeholders
- * Using evidence-based decision making
- * Creating confidence in library **assessment** efforts
- * Dedicating **assessment** personnel and training

Recommendation:

Mobilize library administrators (2)

- * Fostering environments that encourage creativity and risk taking
- * Integrating library **assessment** within library planning, budget, and reward structures
- * Ensuring that **assessment** efforts have requisite resources

Why a focus on Technical Services?

- * Technical services staff equal 20-30% of our total staff
- * Very little published on technical services assessment
- * Most articles that do address assessment in technical services have to do with assessing *specific processes*
- * Interested in a broader approach to technical services assessment

Why Pennsylvania academic libraries?

- * It's a large group (over 120 libraries) and I thought it would provide useful, generalizable results
- * These libraries might be inherently interested in the results, and therefore likely to participate
- * Research and presentation was originally planned for a PaLA College and Research Division program

Survey proposal

- * Survey the academic libraries in Pennsylvania to determine:
 - * **Whether** they conducted assessment of technical services
 - * **How** they conducted assessment
 - * **How** they shared the results of their assessment activities
 - * **What** actions they took based on their assessment activities

Technical Services

For the purposes of the survey, technical services is defined as units responsible for:

- * Cataloging/Metadata
- * Acquisitions
- * Electronic resources management
- * Preservation/Bindery/Physical processing

Academic libraries in Pennsylvania

Downloaded a list of academic libraries from this Pennsylvania Department of Education website:

<http://www.libdir.ed.state.pa.us/screens/wfDownload.aspx>

Included names of institution, library, director, and phone numbers. **It did not include email addresses!**

Academic libraries in Pennsylvania, cont'd

- * Organized alphabetically
- * Deleted duplicates and those without “college” or “university” in name of institution
- * Updated director names (list was not completely up-to-date)
- * Added email addresses (with help)
- * Resulted in 129 academic libraries, but couldn't find email addresses for nine of them
- * End result: 120 libraries were survey candidates

Demographics

- * 63 responding libraries (53% response rate)
 - * 16 Public (25%)
 - * 47 Private (75%)
- * Average total employees: 13 librarians, 17 staff
- * Average total technical services employees: 2 librarians, 4 staff

Does your library conduct assessment of technical services?

- * Original responses:
 - * Yes: 36 libraries (60%)
 - * No: 24 libraries (40%)
- * Adjusted responses based on answers to following question:
 - * Yes: 57 libraries (90%)
 - * No: 6 libraries (10%)

Specific assessment methods

- * Gather statistics (84%)
- * Gather usage data (49%)
- * Gather input from non-technical services librarians (44%)
- * Collect anecdotes or feedback from customers (30%)
- * Conduct customer service surveys (25%)

Specific assessment methods, cont'd

- * Benchmark with other institutions (19%)
- * Anonymous suggestion box (13%)
- * Conduct focus groups (10%)
- * Others included:
 - * ROI studies of specific Technical Services functions
 - * Time studies
 - * Baldrige Assessment Process/360 Review
 - * LibQUAL

Goals of technical services assessment

- * Improve or streamline processes (68%)
- * Improve services (63%)
- * Make better decisions (62%)
- * Inform strategic planning activities (55%)
- * Explore offering new services (40%)
- * Reallocate staff or other services (30%)
- * Compare with other institutions (22%)

Goals of technical services assessment, cont'd

- * Other:
 - * Build better collections
 - * Identifying activities or services that could be eliminated
 - * Establish best practices based on national standards
 - * Demonstrate value of technical services to the university and libraries
 - * Demonstrate value to scholarship and research of original cataloging

Technical Services units assessed within the past five years

- * Cataloging/Metadata (56%)
- * Acquisitions (56%)
- * Electronic resources management (45%)
- * Preservation/Bindery/Physical processing (26%)

Primary responsibility for conducting assessment

- * Library director/Dean/University librarian (38%)
- * Division head (20%)
- * Department head(s) (14%)
- * Unit head(s) (7%)
- * Committee (5%)
- * Single librarian (4%)

Primary responsibility for conducting assessment

- * Other:

- * Department responsible for assessment, but is also done at division, department, and unit level
- * Department and unit heads
- * Director, associate director, and staff
- * Library administrative team
- * Director and committee

How do you report the results of technical services assessment?

- * Annual report (61%)
- * Informational report to library administration (52%)
- * Mass email to library employees (11%)
- * Library newsletter article (8%)
- * Presentations (8%)
- * Web site (5%)
- * Campus newsletter article (2%)

How do you report the results of technical services assessment?

- * Other:
 - * Assessment report
 - * 5-year audit report
 - * Department outcome assessment reports
 - * Report to Provost
 - * Internal discussions
 - * Performance evaluations

Outcomes reported

- * 35 responses
- * Themes:
 - * Streamlining processes
 - * Staff reallocation
 - * Changed vendors/Changed vendor services
 - * Collection decisions
 - * Training
 - * Communication
 - * New services
 - * Changed ILSs

Outcomes reported, cont'd

Example:

- a. In past several years, implemented several staff reorganizations, job reassessments or upgrades, and adjustments to workflow.
- b. Streamlined work processes & procedures, developed training manuals and adapted policies to achieve financial and personnel efficiencies.
- c. Added several new services for faculty, such as new publications email notification, new book display shelves, and improved book order/request system

Questions?

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