Changes in Responsibilities, Organization and Staffing within Technical Services Departments: a
Report of the ALCTS Technical Services Administrators of Medium-Sized Research Libraries
Discussion Group, ALA Midwinter 2007

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The ALCTS Technical Services Administrators of Medium-Sized Research Libraries Discussion Group met at ALA Midwinter in Seattle on Saturday, Jan. 20, 2007, 10:30 a.m.-12:30 p.m., in the beautiful Hilton Seattle Sound View Room overlooking the Puget Sound. Michael Boock, the current Discussion Group chair, opened the meeting by providing an overview of the discussion topic: *Changes in Responsibilities, Organization and Staffing within Technical Services Departments*. Approximately 45 attendees sat at 6 round tables. Many thanks to Maureen Grant, Jack Hall and June Schmidt for recording and summarizing their table discussions.

The topic of changes to staffing and organization within Technical Services departments to accommodate changing responsibilities proved timely and provoked a stimulating discussion. The tables focused on questions related to the topic provided by the Steering Team: 1. What new tasks and responsibilities are Technical Services departments taking on now and in the next 3 years? 2. What tasks will Technical Services departments give up/reduce/outsource in order to take on these new responsibilities, and how? 3. How will Technical Services departments be organized to take on these new responsibilities? 4. How do we start training now for a future that isn't totally clear? 5. How will we help existing staff transition to new roles? 6. What kinds of staffing will be needed in the future (e.g. MLS?, Paraprofessional vs. professional, programming skills?) to take on these new responsibilities? What duties are assigned to which staff? 7. How will libraries recruit to fill these positions?

- **What new tasks and responsibilities are Technical Services departments taking on now and in the next 3 years?**

In addition to acquiring and enabling access to electronic journals and databases – an activity in which all technical services departments are already thoroughly engaged – participants note that

their libraries increasingly handle large packages of electronic books and data sets. They note that the process for acquiring and cataloging electronic resources is similar to the print process: orders are created, invoices paid and resources cataloged. However, there are many additional tasks unique to electronic resources: management of trials, licensing and negotiation, activation, setting up interfaces, registering IP ranges, and troubleshooting access problems. Much of the cataloging of electronic resources is outsourced to a vendor, requiring batch loading of records rather than cataloging of each item.

Another area in which technical services responsibilities have grown and are likely to continue to grow is in the digitization, cataloging and management of unique institutional resources. At some libraries this includes scanning, metadata creation, development of controlled vocabularies and creation of data dictionaries. Other technical services departments report that they are increasingly involved in institutional repository management, support, promotion and resource cataloging. Other libraries report increased involvement of their technical services staff in managing their Web OPACs and other user interfaces, and in some case their library's integrated library systems.

- **What tasks will Technical Services departments give up/reduce/outsource in order to take on these new responsibilities, and how?**

Unsurprisingly, most participants report that at least some monographs processing and cataloging has already been outsourced at their libraries. Many of those that do not currently acquire shelf-ready cataloging for a portion of their monographs are considering it. Where this has already occurred, staff are freed to take on other responsibilities. Many libraries outsource their authority

work or have decided to not do authority work on their catalog headings. Some participants have discontinued or at least greatly reduced print serial check-in and claiming and expect that to continue in the next several years.

Participants report that their technical services departments no longer supply Library of Congress Subject Headings for some items in their catalogs including theses and dissertations. Technical services departments that have a role in cataloging resources that appear in their institutional repositories often do not apply subject headings to those resources, instead relying on full-text, abstract and author-supplied descriptors for retrieval.

Many participants report the importance of closely reviewing current processes and workflows. Look at the work that staff currently do: Is all of that work necessary? Is some of the work being done just because it has always been done that way? Are there procedures that can be streamlined? Several participants note that they have permanently lost positions in technical services due to retirement or library reorganization, forcing difficult choices regarding what does and does not get done.

- **How will Technical Services departments be organized to take on these new responsibilities?**

There were a wide variety of responses from participants about organizational models. More than one participant suggests that a flatter organizational model can make departments more agile. Others suggest that greater cross-training occur so that staff can more quickly be deployed to handle priority tasks, project work and new responsibilities. Some participants incorporate

licensing and electronic resource management within existing units and others create separate electronic resource units.

Most libraries attempt to redeploy staff to take on new responsibilities, some with more success than others. At one such library, a person whose position was redefined now claims monographs, serial issues and troubleshoots electronic access. Another library reports that its digital production unit within technical services includes two staff formerly responsible for collection maintenance and copy cataloging work.

Several participants report that they have had success hiring temporary staff and students to take on new responsibilities. Two participants agreed that hiring temporary staff, including recent MLS graduates, achieves the efficient completion of work. It also brings new ideas into a department and serves as motivation for permanent staff to see how the new work can be accomplished.

- **How do we start training now for a future that isn't totally clear?**
- **How will we help existing staff transition to new roles?**

As technical services activities are increasingly streamlined, outsourced or reduced, participants retrain and redeploy staff formerly responsible for those activities. Staff training is an essential activity and is a managerial focus of many participants. They note that many of the new responsibilities in their departments require a relatively high level of expertise and are at a higher classification compared to the work done by clerical level copy cataloging and periodical check-

in staff. Many participants consider training and reclassification an option for those staff that are willing and interested.

The attribute that is most necessary for staff within technical services departments in the changing climate is flexibility and willingness to change. One participant notes that she could teach a person to perform almost any task as long as there is willingness to learn. Participants agree that training offered by library associations, consortia, networks and vendors is beneficial. Some recommend in-house training as much as possible.

Management must communicate with staff regarding what changes are expected and what is necessary for departments to accomplish those changes. Through better communication throughout the organization, participants report, the "FUD (fear, uncertainty, and doubt) principle" is reduced, if not wholly eliminated. Managers must recognize staff potential and give staff opportunities to succeed and to fail. Several participants find staff to be enthusiastic when asked to take on new responsibilities and learn new things. Often, participants identify staff with previously hidden talents and skills. One reports that you never know what people are good at until they are given a chance to prove themselves.

- **What kinds of staffing will be needed in the future (e.g. MLS?, Paraprofessional vs. professional, programming skills?) to take on these new responsibilities? What duties are assigned to which staff?**
- **How will libraries recruit to fill these positions?**

Not surprisingly, many participants agree that computer skills are a must. Several report that paraprofessional staff already do original cataloging at their libraries and are expected to increasingly be responsible for metadata creation. Librarians, with tenure requirements, professional obligations, and committee meetings increasingly manage projects and workflows and are less responsible for hands-on work.

Most tables did not have time to respond to the final question about how libraries plan to fill positions. Some participants note that there is a lack of qualified professional catalogers applying for open positions and few entry level librarians apply. One participant suggests that libraries ask for too much experience in advertisements and that libraries need to do a better job of mentoring recent graduates and encouraging new librarians to consider technical services work.