**TSMALIG Combined Notes – Interested Group Week, 2/2/21**

Compiled by Lauren DeVoe, Chair of TSMALIG, 2/8/21

**Group 1 - The Effects of COVID19 on Technical Services Departments**

Moderated by Lauren DeVoe

Started out talking about how staff were sent home in March.

Several people commented that they was not a lot of notice so weren’t prepared to go remote.  Some people were able to come back to the office to pick up things but others had to negotiate with their universities to get loaner laptops.  Equipment and wi-fi were problems for staff more so than librarians since they’ve never worked remotely.  Some had to use their own equipment, e.g. buy desks, chairs, use their phones as hotspots, etc.  Took a while to get setup to work remotely.

What did you do to transition?

Some staff were deemed essential and were able to go back to work either remotely or on-site.  Others did database cleanup remotely or migrated to new systems.  On-site staff are staggered, i.e. not everyone there at same time.  There were some furloughs, others were encouraged to retire so less staffing to do the work.

What about the budget?

Cuts to collection budgets, retirements, hiring freezes, no raises, salary cuts and furloughs.

What was good?

We were able to tackle projects that had been put off, staff were able to learn new skills.  The Libraries were appreciated for being able to provide resources.  Not having to commute, being able to spend more time outside.  Looking forward to working remotely post-pandemic.

**Group 2 - Motivating staff from a distance**

Moderated by Christine DeZelar-Tiedman

* What barriers have staff encountered to work productively from home? What solutions have you offered as managers to help mitigate this?
	+ Worried about motivation for staff who can’t do “regular” job; staff working on special projects, database maintenance, digital repository tasks;
	+ Six months ago would have been a much different conversation, but staff are better now re: productivity
* Have expectations changed regarding productivity, turnaround times, etc.? In what ways?
	+ WFH staff make weekly trips to bring in finished items, take home new; haven’t talked much about expectations; keep up as much as they can;
	+ Difficulty keeping processing staff engaged;
	+ Have processing staff working in conference rooms for safety
	+ Deemed essential services; trade off who goes in; assign staff to work on projects from home, e.g. digital repository tasks;
	+ Discussion re: sending materials home, how they’re being tracked;
* Are you checking in more often or less often with staff? What has worked to monitor staff without being overbearing or micromanaging?
	+ Making sure we have more dedicated time to talk – meeting weekly instead of monthly; hasn’t felt overbearing
	+ Meets with direct reports once a month; every other week all staff meetings
	+ Monthly mtgs with direct reports, monthly dept meetings; weekly update e-mails – here’s what’s going on, etc.
	+ Asked staff what they want re: how often to meet; some like more often, some don’t
* Have you scheduled any social or casual virtual events for staff? What has worked well? Do you feel this helps with staff morale and motivation?
	+ Team (8 people total), colleagues & direct reports; working on games to play for fun; ways for people to work together; no prizes; team-building; has gone really well (3 times since Dec.); also just hangout and talk; helping to boost isolation
	+ Last March, TS director instituted water cooler meetings, twice a week; some work but also just chatting
	+ Number of things, organized by managers and leadership; coffee hours, monthly lunches;
* Any other tips or tools for motivating staff?

**Group 3 - The digital divide in technical services**

Moderated by Debbie McCarthy

- **What worked, what happened early,and what is happening now**?

* Some universities sent laptops to employees who needed them
* Some of the employees adapted quickly and are good to experiment in learning, while the training stuff is harder w/o being in person
* Some managers managed by leading by example and ‘taking the risk’ and showing up
* Oft times, it is the lower paid staff that are needed onsite
* Some folks, who may not ‘need’ to come onsite are adding one day per week to balance the onsite/remote efforts
* ILL is working for a LOT of things to fulfill basic needs

- **Have universities run out of laptops**?

* Some universities sent the employees home with their laptops
* Different in how libraries closed, or did not fully close, but still had to work at home, so there were differences in the approach and who got what equipment such as even chairs or whether folks even have good internet access to use

- **working from home?**

* Staff have work they can do remotely as opposed to physical things that need to be dealt with on-site
* even with cross-training, this may solve of the print/e divide, but some folks still do not adapt to the situation super well
* There are still persons who do need to be onsite (which some think may be unfair) for a multitude of reasons

- **e Policies?**

* shifting away from print
* canceling print serials (many)
* some institutions are not checking in print serials right now
* But the mostly print oriented staff need to be moved to e-work mostly
* dollars are being spent differently
* how to get non-English (Spanish language) streaming media, but there is not availability in all languages for streaming media
* It is expensive to keep everything for everyone for every ‘personal’ reason not tethered to curriculum
* one institution cut 1000 print serials to 500, another cut from 150 to 36.
* Much of the cut issue is tied to budget, but also to DE-duplication of titles already available in e-format
* one institution is going with one-user and one-day download time limits in acknowledgment of serious budget challenges
* cut back from approval plans generally, to the point that some ask if the ‘normal’ approval plan will ever return

- **System Migration?**

* Don’t recommend migrating during a pandemic ☺
* Some folks are training and preparing for Migration to FOLIO
* workflows and training is more complicated from home for all persons involved in a system migration

- **Mail?**

* Mail has definitely been an issue during the pandemic
* who gets it, who sorts it, etc

- **Notes from CHAT:**

* “We went to an e-preferred selection and acquisitions, ended receiving gifts, and placed a moratorium on binding. “
* “I supervise acquisitions/cataloging of non-Western materials which are not available in e-format. We told vendors to keep acquiring for us (to spend down our budget) but hold shipments for several months. We resumed shipments as of October. The books are currently pouring in from places like China and the Middle East and we are at 40% capacity (2 days a week) and have little room for storage”
* “We are maintaining much of our law collection in print, although some are seemingly being phased out with each LMA.”
* “We have a new World Films Study program here at Clemson. The films are difficult to find in DVD, even more challenging for streaming. “
* “We signed our 3-year LMA last year - the benefit of doing during a pandemic. “

**Group 4 - From COVID-response to the 'new normal': managing TS staff and workflows remotely now & in the future**

*Moderator, Lynn Whittenberger - Associate Head, Acquisitions & Discovery, NC State University Libraries*

Google doc link: [https://docs.google.com/document/d/1eWqKeP9QHkQRqzVPJSXBpSGt1sFTExO9uXKeUzhube4/edit?usp=sharingTechnical Services in Academic Libraries IG Session](https://docs.google.com/document/d/1eWqKeP9QHkQRqzVPJSXBpSGt1sFTExO9uXKeUzhube4/edit?usp=sharing)

**Questions/Discussion topics**

Post-Covid, what does the ‘ideal’ new normal look like for you / your institution?

Depends on the situation: some folks could be 100% remote; some need to be onsite more

Overall there are many benefits that could be gained from telework options

University taking lots of guidance from the state / governor

No clear signals about how work is going to evolve; clear that staff prefer it

Librarians are faculty & have more flexibility to WfH; classified staff have not had that flexibility; have seen that they can be productive from home; WfH option for all would be more equitable

* Greater flexibility to WFH and increased resources (such as extra barcode scanners and other technology)
* Some folks have been remote since March (and a flip to a new ILS!!!)
	+ Some impetus for change has come from the state / Governor level
	+ Hiring & training remotely (both temp and permanent) - all remote
		- Meetings online; 1 day onsite to review physical processing
		- Lots of communication / back & forth to ensure training happens
	+ Team has been hybrid to deal with print receipts & processing those
		- Alternating receipt days with cataloging days
		- Switching to ebook primarily
		- Spring is remote / summer is unknown
		- Scheduling onsite work - need to set a rotation so that staff in proximity aren’t close by
	+ Hybrid at Vanderbilt: assistants have gone back in with spacing: offices are repurposed for onsite staff; most people going in 3x week; some are going in everyday.  March to summer they were completely remote. People are going in to pick up materials to catalog 1x week and taking them home
		- Have been using time to cleanup holdings & item records that got messed up during a migration a few years ago
			* Project that people from other department have been able to work on this
	+ Question for fully remote - what are you having people doing?
		- CLeanup projects
		- Deep dive into those cleanup projects that were on the back burner
		- Deep dive into finding cleanup project in the database
			* People across the library appreciate the training
		- Backlog of digital cataloging - can be done remotely
		- Cataloger working on ebook issues: original cataloging of theses (taking home); when onsite, preps books for cataloging work at home
		- Chat support by TS staff

What are obstacles to creating / instituting that new normal?

* When your LIbrary ILS is not cloud based but is client based, and have to rely on campus ITS department granting remote access - still waiting since Summer 2020 for our ITS department to grant remote access to 2 catalogers
* Perceived lack of support from Library / University for telework options
* Campus deciding what is essential work, based on state plan, and access to campus being based on future state vaccine schedule for educators
* Lack of clarity about future plans from Administration
* Only librarians deemed “trustworthy” to take home materials; paraprofessionals cannot
* BUdgets are going to be strapped - no raises; but one thing admin CAN do is provide more flexibility (hybrid working) as a perk in the absence of $$
* Need to remote into desktops due to specialized software
	+ Campus technical infrastructure needs to be up to the task
* New/additional equipment necessary for WFH environments (laptops instead of desktops, etc.)

Brainstorm strategies for addressing those obstacles

What works/doesn’t work for managing staff remotely now; are those practices sustainable?

    Demonstrated productivity by classified / civil

Are you experiencing / do you anticipate changes to workflows?

    What strategies are you putting in place to adapt to those changes?

* For a short while in the Fall Term and now in the Spring, our library is partially open for curbside pickup and reservations for study table and computer use. Our Circulation and Technical Services staff are integrated, have been that way for years. So right now, 1 staff member is scheduled 1 day week to cover that circulation window on our 1st floor and while they are there, they can work as much as possible on backlog (1 focuses on Gov Docs, 1 focuses on Serials/Continuations, 2 others focus on checking in periodicals/newspapers). My Gov Docs person is taking materials home to put things in a spreadsheet (doesn’t yet have remote access to our ILS). Trying to push for approval for another staff member to take materials home, as she does have remote access to our ILS.

Hiring and training a new person all remotely

* Training staff remotely - do you rely on Teams meetings, recording training videos in Stream, training documents in Teams file area?

**Group 5 - Making the most out of in-person work during COVID**

Moderated by Greg Ferguson

Changing priorities

* Shifting effort to e-resources has left very limited time for print materials.  Some institutions have reduced print collecting while others are still bringing in significant amounts.
* Priorities for in-person work now seem to be:
	+ Confirming receipt of physical materials and making payments
	+ Rush processing for select high-priority materials
	+ Scanning physical materials for surrogate cataloging by staff working remotely
		- (Other institutions are letting staff take materials home to work on)

Challenges

* Limited staffing
* Staff being pulled onto other tasks within technical services, elsewhere in the library, or even outside the library (e.g. managing lines at other locations on campus)
* Adjusting to longer turnaround times and managing expectations of people outside technical services
* Extra time spent on email and Zoom meetings, as opposed to quick conversations in the office

Staff concerns about in-person work

* The institutions represented in the group have all been flexible with remote work arrangements even for people whose work normally involves physical materials.  One library asked only those staff who could walk or drive to the building to return in person (vs taking public transportation).  Another asked staff to come back but made accommodations for anyone who had concerns about their health, childcare, etc.  The group recognized the equity implications of the situation at institutions where staff may have been mandated to return.

Opportunities/successes

* Unfortunately this topic was brief but we heard from a couple institutions who are taking the opportunity to streamline workflows and let go of redundant or low-impact tasks, which will hopefully bring benefits after the pandemic