**Report of the ALCTS Technical Services Managers in Academic Libraries Interest Group Meeting, American Library Association Annual Conference, New Orleans, LA June 23, 2018**

The ALCTS Technical Services Managers in Academic Libraries Interest Group (TSMALIG) Meeting at the ALA 2018 Annual Conference had 42 participants. Attendees had seven roundtable discussion topics to choose from. Discussion topics were developed and facilitated by TSMALIG Planning Committee members. 3 minutes was allotted for the introductions and interest group business, 35 minutes for roundtable discussions, and 22 minutes for representatives from the six roundtables to report summaries of discussions to the full group.

During the business portion of the meeting, volunteers were sought to serve on the TSMALIG Planning Committee where they can develop discussion topics and/or serve as facilitators. Outgoing Chair Peter Spyers-Duran, University of Central Florida, introduced incoming Chair Shannon Tennant, Elon University, and Vice-chair, Lauren DeVoe, Columbia University, whose terms begin after ALA Annual 2018. Thank you to the facilitators and planning committee members who provided ideas for topics and led the discussions, as well as to the note takers, and to those who reported on the table discussions to the full group. The summaries of discussions on the following pages provide a snapshot of some of the current issues in academic library technical services management.

**Table 1: Fostering Professional Development for Long Term Staff on a Budget (facilitator: Elizabeth Miraglia, University of California San Diego)**

The discussion opened with attendees describing the current environment for workers in their technical services departments. Technical services staff hired 20-30 years ago could expect a stable career and relatively little change; however, today the reality is constant change. Universities and other parent organizations have expectations for staff to have “soft skills” including change management and project management—skills that can be difficult to teach and develop.

For managers, finding training opportunities for staff such as webinars, conferences, and committee participation is relatively easy to do. It can be more of a challenge to get administrative support to pay for staff training and in some cases to motivate staff to want develop themselves. It can be hard to find the time and opportunities for staff who have received training to integrate what they have learned into their daily work. When long-term staff are given the opportunity to do some of the work that a supervisor would normally do, such as project management, invoicing, and reporting, the work that the staff used to do can be shifted to lower level staff.

Staff need to have motivation to keep learning. If they don’t think that they can move up in an organization, they may be more hesitant to learn. If management can’t reclassify or promote staff due to organizational constraints then management should be happy to train staff with the aim of helping them to better themselves and then leave. Doing so means getting good people now, who will help improve the organization. Staff who have already experienced large changes can find the “survivor” experience empowering and make them more open to future change. Change can cause “change exhaustion” which can inhibit future growth if it isn’t implemented well or if it happens too often. The roundtable discussed how the culture of an institution or department can play a huge role in how well change is implemented and received by staff. Even small gestures on management’s part can have a huge impact on morale. For example, when Yale realized that its new facility was not near a coffee shop, it began providing free coffee to staff. Staff need to know that they will not be penalized for making mistakes. Mistakes should be viewed as valuable learning opportunities. When staff are fearful of the consequences of making mistakes, paralysis can set in, and result in decreased productivity, innovation, and morale. Managers need to model behavior by being honest about their own mistakes and knowledge gaps, and by not punishing people for mistakes made during the learning process. Changing work roles in technical services pushes people to learn new things. Managers can provide opportunities by shifting pieces of work to different levels of staff. Staff don’t need to be given entirely new assignments. Existing work can be augmented, so that development happens naturally and is less jarring.

Finally, the discussion turned to preparing for when long term staff leave. Cross training staff is a great way for staff to develop new skills and for organizations to have a “deep bench” of talent who can step into vacated positions when staff leave permanently or for an extended period of time. Managers should develop effective justifications for positions, set expectations for the rest of the institution, and solicit help from stakeholders when recruiting. Failing to do so can result in a position remaining unfilled or being transferred to another department.

 **Table 2: Change Management in Tech Services (facilitator: Sarah Weeks, Saint Olaf College)**

The discussion opened with participants describing the significant changes facing Technical Services Departments. The consensus was that the rate of change in technical services is increasing. The most frequently mentioned changes were retirements, new hires, position reclassifications, reorganizations, and migrations to new integrated library management systems. Other changes mentioned include software changes (Google suite), financial challenges, merging branch libraries, and changes to the physical layout of departments. During times of change staff tend to be more fearful that they might lose their jobs. Staff are forced to learn new things—new software, new ways of doing things, new workflows which can present challenges for someone who only knows how to do one thing really well, one way.

The group briefly discussed the challenges associated with change including loss of motivation, increased job dissatisfaction, decreased productivity, and the loss of institutional knowledge when employees leave. Participants also discussed the challenges of communicating the value of technical services work to administrators and co-workers in other departments.

The discussion moved on to strategies for helping people to cope with change. Communication is key. Communicate with staff early and be as transparent as possible. Share as much information as possible. The idea of scaffolding involves learning one part of a job before learning the next part. Scaffolding allows employees to feel confident with a new software or process before taking on the next challenge.

The discussion next turned to empowering staff participation. In the case of a software migration, everyone should be assigned tasks that they must complete in order to prepare for the migration. Participation makes everyone feel as though they are part of the process rather than that something is happening to them. Identify the change agents in your organization and make sure they are part of the team that is leading the change initiative.

Participants also discussed workflow mapping and how to identify institutional and library priorities. By looking at everybody’s work and workflows, new efficiencies can be created as well as new ways of doing things. As much as possible, allow for extended timelines for change. During times of change, work should be prioritized and the most critical work completed first.

**Table 3: Rethinking Tech Services: Playing a Role in Scholarly Communication
(facilitator: Sai Deng, University of Central Florida)**

After introductions, the facilitator asked participants to discuss how technical services librarians participate in scholarly communication at their institutions. Many participants described the organizational structure and composition of scholarly communication units at their home institutions. Most participants’ libraries have scholarly communication committees or task forces. Some committees and task forces include teaching faculty as members. Only a minority of scholarly communication committees and task forces include technical services staff.

Participants next discussed a definition of scholarly communication. Scholarly communication is one of those things where you know it when you see it. Scholarly communication services are as varied as the institutions that offer them. In the broadest sense, scholarly communication includes supporting faculty and students. At the University of Minnesota scholarly communication includes such efforts as empowering scholars, teaching them to take control of their data, teaching them to advocate for themselves. The University of Central Florida (UCF) created a research lifecycle model that embeds campus-wide scholarly services into the students’ and faculty members’ research flows. UCF’s Research Lifecycle is coordinated by the University Libraries and includes several other campus units.

The discussion next turned to scholarly communication services, which include: liaison activities, assessing the impact of research, copyright education, selecting and acquiring electronic resources, open access (OA), open educational resources (OERs), digital publishing, and institutional repositories (IRs).

The norm has been that technical services librarians support research by buying and cataloging resources, creating metadata and providing access to information. Several participants described their struggles in getting technical services librarians involved in the scholarly communication processes at their libraries. Institutional culture can be an obstacle. Several participants mentioned that only designated scholarly communication liaisons or public services librarians at their institutions may communicate with faculty. Although at some institutions technical services librarians feel that they are excluded from participating in scholarly communication activities, at other institutions they are included. For example, at one institution a technical services librarian has built a relationship with digital humanities faculty and is serving on a Ph.D. examination committee. Several participants’ institutions provide grants to help faculty develop OERs. Part of the process involves working with technical services librarians. At one institution, librarians in acquisitions work with faculty and subject librarians to write grants for acquiring and purchasing new resources.

Participants next discussed how library structure can support technical services’ inclusion in scholarly communication. Going forward, technical services librarians must leverage their existing skills, develop new skills, and articulate the importance of their work to scholarly communications in order to make inroads in the process.

**Table 4: Adding Marketing of Collections to Tech Services Responsibilities
(facilitator: Michael Arthur, University of Alabama)**

The facilitator delivered a PowerPoint presentation about a marketing program aimed at promoting library collections that was developed by the Technical Services Department at the University of Alabama (UA).1 None of the roundtable participants have a formal program to market collections through technical services and were eager to learn about the program at UA.

The program at UA began in early 2016, with the hiring of one student worker for 20 hours per week. The student had a background in marketing. She focused on developing images for monitors within the library and in selected buildings on campus. The program has evolved and now includes 2-3 supervised students working 10 hours per week. Most student workers are hired based on the word of mouth recommendations of current students. When it has been necessary to advertise for student workers, advertisements specifically mention having knowledge of specific software and developing digital marketing materials. Student workers are supervised by a full time staff position with a fifty percent FTE allocated to managing the marketing operation. That position reports to the department head and works directly with the library marketing manager to ensure that all requirements are met for branding and use of library and university logos and preferred wording.

During the early stages of the program UA tried using social marketing with Facebook and Twitter, but these efforts did not yield the expected return on investment. The marketing program focuses on producing digital images for monitors around campus, for a library homepage carousel, and marketing flyers that are distributed to liaisons.

The marketing operation within technical services is limited to materials in the UA Libraries’ collections. Library resources promoted include highly used resources, brand new resources, resources that have undergone major enhancements, as well as requests from liaisons or departments. Individual books are not promoted; however, collections of e-books and collections of streaming videos are promoted. A film of the week on the Kanopy platform is highlighted, but it is done to promote the Kanopy platform rather than an individual film. Non-technical services units in the library also hold events to market services and resources. Technical services staff are available to assist with images for any resources being promoted. Digital marketing materials are stored in a shared folder and are indexed so that liaisons can more easily locate images by discipline.

Measuring the impact of certain promotion techniques can be more challenging than others. It is straightforward to compile statistics of clicks on website carousel images. In contrast, tracking the impact of digital signs on usage is difficult to ascertain because measures are indirect. UA has received positive feedback regarding the website carousel images.

Publishers and vendors help technical services with various marketing initiatives on campus. They provide UA with many of the images used on the website carousel. Publishers also review carousel images upon request to ensure they are up-to-date. Publishers also sponsor lunch and learns, panel discussions, and expos where they give presentations about their resources.

UA’s technical services’ marketing program was implemented during a large reorganization and workflow analysis that began with the hiring of the new technical services department head. UA’s library administration continues to support the technical services’ marketing program as evidenced by their ongoing funding. Marketing of collections was added to UA’s new library strategic plan.

Collections account for nearly one-half of many libraries’ budgets. Marketing collections is an important means to actively engage liaisons and publishers, to encourage usage, and improve return on investment. Technical services (which at UA includes collection management) is an ideal place to manage marketing of collections because of the direct and personal connections that technical services librarians have with publishers who have been key to actively contributing to the success of the program.

**Table 5: Creative Ideas to Increase the Visibility of Tech Services (facilitator: Teressa Keenan, University of Montana)**

The overall theme of the discussion was finding ways to make technical services magic and throw out sparkles. If technical services is proactive with training, it will encourage stakeholders outside of technical services to get involved with learning. Use less jargon or make that jargon more accessible. Work at not being perceived as the “keepers” of technical services knowledge. Humor always helps. Actively participate in activities and committees outside of technical services. Make yourself available and approachable. Introduce yourself outside of your department. Don’t overwhelm people outside technical services with too much information. Make sure to ask what their desired outcome is. MARC language and cataloging issues can be confusing. Make it easy for everyone to understand the issues.

Give presentations to introduce other departments to technical services. Make technical services accessible and fun. Market technical services internally to the library to get more people interested and involved. Catalog everyday objects or even individual people as examples. Make it easy. Only use a short amount of time for training because it can be overwhelming and eyes will glaze over. Approach issues from an end user perspective when communicating with colleagues from outside of technical services. Technical services people can be seen as “rule followers.” By showing that technical services has practical solutions to problems can demonstrate that technical services is flexible and relevant. Technical services staff often use backend modules of the catalog, while access services staff use the public facing interfaces. Use the public facing interfaces when explaining or demonstrating how problems can be solved, so that non-catalogers understand what was done without overwhelming them.

Proactively seek feedback from non-technical services staff. Non-catalogers have to communicate problems to catalogers if they want problems fixed, but this often does not happen. By listening to problems and taking care of them, catalogers can demonstrate the direct impact of the work they do. Work with subject specialists on cataloging issues. Encourage subject specialists to get involved in cataloging things like foreign language and special materials. Let subject specialists advocate for the work we are doing to other departments. Make the work of technical services visible to directors and department heads. Technical services librarians can get on committees to get to know non-technical services colleagues. Hold open houses. Introduce non-technical services staff to different library departments, so that people outside of technical services know who to call about problems and issues. Document workflows and make them available both inside and outside of technical services. Crosstrain staff so that anyone can answer any question that is brought to technical services. Always be respectful when talking about past practices, workflows, policies, and people.

**Table 6: Managing the Discovery of and Access to Open Educational Resources in Academic Libraries (facilitator: John Novak, University of Nevada, Las Vegas)**

The roundtable discussion began with the facilitator defining open educational resources (OERs). OERs are teaching, learning, and research resources that reside in the public domain or have been released under an intellectual property license that permits their free use and re-purposing by others.

An example of OERs is the open textbook movement. The facilitator asked participants if their libraries provide Creative Commons Licenses for OERs or for content in the institutional repository (IR). Some of the participants that host OERs are Digital Commons customers. Some institutions use customized Creative Commons licenses and other institutions use default licenses.

When thinking about whether to make OERs discoverable or not, think about your audience. Roundtable participants suggested targeting faculty, students, distance learning, sciences, and writing programs. Some are add OERS to the IR but not to the catalog, some do both via a crosswalk from the IR to the catalog, and one library catalogs OERs whether or not they were created by the library. Participants next discussed where to make OERs discoverable. Suggestions included IRs, library catalogs, and learning management systems such as Canvas and Blackboard.

The facilitator asked where OERs should be hosted. Some participants said OERs should be hosted locally and others said OERs can be hosted at other institutions. The facilitator next asked participants if their institutions has someone that is dedicated to working with OERs. One participant’s library has a dedicated OER librarian. Often the scholarly communication librarian or scholarly communication committee will work with technical services in this area. The facilitator next asked participants if their institutions participate in a consortia for OERs. One librarian is participating in a Maryland consortia to develop a portal of OERs and creating an institutional repository.

The facilitator asked participants what they think about cataloging a resource that could quickly go out of date. Most participants agreed that it is important to catalog a resource if faculty have requested that it be cataloged. According to several participants Google searches drive a majority of traffic to their IRs. This being the case, OERs should be search engine optimized, especially if part of the target audience is outside of the institution.  In conclusion, there is great diversity in what institutions are doing to provide access to OERs. The common theme is that if your institution’s faculty are using an OER then it is worth cataloging it.

**Table 7: Hiring and Creating Valuable Opportunities for Student Workers
(facilitator: Kristine Shrauger, University of Central Florida)**

Due to the small number of participants at table 7, the discussion about hiring and creating valuable opportunities for student workers did not take place.

**Notes:**

1. Arthur, Michael A. (2018). *Developing A Collections Marketing Program At The University of Alabama.* [http://ir.ua.edu/handle/123456789/3713](https://na01.safelinks.protection.outlook.com/?url=http%3A%2F%2Fir.ua.edu%2Fhandle%2F123456789%2F3713&data=02%7C01%7CPeter.Spyers-Duran%40ucf.edu%7C4c0f324fe1964bd0e0a308d5ecb84cda%7Cbb932f15ef3842ba91fcf3c59d5dd1f1%7C0%7C0%7C636675198667158215&sdata=A1WC%2B7AmNVotUWxDSA4PhhcYTGwPLKlrWa6pSAKRQFI%3D&reserved=0)