LIBRARY LEADERSHIP & MANAGEMENT

Technical Services for Changing Times: Adjusting our Image, Our Skills, and Our Mission

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Abstract

The future of technical services presents a dizzying array of challenges and opportunities. From shared print initiatives and inter-institutional cooperative cataloging to rapidly evolving technologies and the changing face of technical services professionals and staff, leadership in technical services increasingly requires an ability to perform a multitude of balancing acts. Successful management must involve an in-depth understanding of the needs of patrons, the flexibility to recognize when traditional technical services functions have outlived their usefulness, and a willingness to try new things that may fail. This article draws on experiences, both successful and not, from a large academic research library to provide useful insight for leaders at other institutions.

Introduction

Ongoing budget constraints, evolving public services, rapidly changing technologies and high user expectations all have a significant impact on technical services in libraries. In order to succeed in the face of a multitude of simultaneous challenges it is more important than ever for technical services to have true leaders who are forward-thinking and able to move beyond managing the day to day to creating a vision of the future. Whether an institution is investigating consortial collection development, outsourcing of cataloging, implementing a new discovery or integrated library system, or re-envisioning existing services, many of the characteristics and skills needed for successful leadership remain the same.

Many of the problems of leadership in technical services and, indeed, many of the solutions to those problems, are not new. Instead there is perhaps a new, greater understanding developing that all aspects of library work require excellent communication and personal skills, intellectual curiosity and a willingness to help inform the profession, and the ability to be flexible in pursuit of changing goals. Far from the clichéd back room operation where rows of catalogers employed clerical skills to update the card catalog, operations that in truth were probably never as siloed as perceived, technical services operations today rely on leaders who can articulate an in-depth understanding of technical services as core to the success of all library endeavors, both to the administration and all levels of staff.

Literature Review

There is often great truth in the old adage that the more things change, the more they stay the same. Michael Gorman, in a chapter from 1982 aptly titled "A Good Heart and an Organized Mind: Leadership in Technical Services," discusses the ways that technical services staff and units are asked to become more and more cost-effective and efficient, and the negative impact that has on staff morale as technical services are often the hidden component of library success. He discusses the difference between management and leadership, namely that managers are concerned with what is and leaders are concerned with what will be, and summarizes the true role of leadership as follows:

> The true role of leadership lies in anticipating the future, in understanding the impact of new technologies, and in making adjustments in organizational patterns to meet both the demands of the future and the needs of technical services personnel. In this last role lies another vital attribute of the leader: the ability to sense, articulate, and respond to the needs of the library's employees … and always to accept them as human beings with professional and personal aspirations that are more important than the corporate aims of the library. Not the least reason for this attitude is that any institution which seeks to elevate its corporate concerns over those of the individuals who make up the library staff will undoubtedly fail in that endeavor. There are practical, as well as moral, reasons behind the need for a leader to have a good heart as well as an organized mind. (Gorman 1982, 74-5)

In 1988, Donald E. Riggs continued on the same theme, drawing a clear distinction between leadership and management in technical services. He indicates that one way to determine whether an institution has a good manager or a good leader is to determine whether or not the work is done effectively, or if the work is done effectively in conjunction with asking the question of why the work is being done. Riggs defines things in terms of transactional versus transformational, and noted "A notch above the transactional manager is the transformational leader. This person is creative, possesses 'high-octane' energy, and recruits a library staff who reflects an optimum service philosophy. This type of leader enjoys making things happen. A transformative direction is established; changes are made in the way things are done" (Riggs 1988, 29). The key role of the leader is to not only move the organization forward, but to encourage participation and growth at all levels, as "targets of opportunity are pounced upon by technical services; new strategies and collective energies are pulled together toward the attainment of agreed-upon goals/objectives. These collective aspirations are achieved as a result of the symbiotic relationship between the leaders in technical services and their followers" (Riggs, 29-30).

The human factor, and the relationship between leaders' personal attributes and their approaches to work, are an on-going theme in discussions regarding leadership in technical services. In a panel session with Joyce Ogburn, Carol Pitts Diedrichs, and Karen Calhoun, at NASIG 2007, the personal attributes identified as defining a leader were "courage, honesty, integrity, fairness, tact, patience, passion, energy, optimism, and flexibility" (Morris 2008). In an interesting spin on the topic, the panelists went on to note that the very challenges inherent in

technical services work, such as budget and staffing cuts and rapidly changing technologies, have been the "mother of invention," preparing leaders in technical services well by reinforcing good leadership skills through necessity. Indeed, "by managing people and resources, adhering to a code of ethics and accountability standards, applying new technologies, working as part of a team, dealing with constant change, and serving customers – all while cultivating an environment ripe for innovation – technical services staff members hone their leadership skills on a daily basis at all levels" (McKee et al. 2008, 130).

As Sarah Michalak notes in a recent article about the transformation of the University Libraries of the University of North Carolina at Chapel Hill, leadership and transformation are heavily intertwined. Though some of the changes that transpired at Chapel Hill may not apply at other institutions, one of the key aspects of success was the emphasis on collaboration. Michalak indicates that:

> For example, a backlog of rare book cataloging in special collections was steadily diminished when librarians in the main library's Resource Description and Management Department went to work on it. Previously, requests and permissions would have spent months working their way up and down the chain of command. When the entire science library collection had to be interfiled and re-shelved, the main library circulation manager volunteered to bring a team and do the job. These examples arise from the flexible and cooperative attitudes that the library staff wanted to adopt in a transformation to a different culture (Michalak 2012, 418).

Such radical transformation, including a complete reorganization of technical services, was only possible due to successful leadership, and leadership displayed at all levels of staffing.

When reflecting on paths towards leadership, in cataloging in particular, Picknally Camden et al. (2008) note that there are numerous, individual paths towards leadership, but that they share some common threads such as a willingness to be uncomfortable and try things outside the typical comfort zone, earning trust through honesty and reliability, and gaining expertise and visibility through research that furthers the profession. Regina Romano Reynolds quotes Albert Einstein as saying "Not everything that can be counted, counts; and not everything that counts can be counted" (Camden et al. 2008, 27). Though the reference is intended to bring notice to the idea of libraries as a common good, it is also a nice summary of many of the visions of leadership espoused in the article, which indicate that valuing people and trying things that may fail are just as important for true leadership as being able to point to fiscal responsibility and known successes.

Leading in Uncertain Times

Much as there are different paths that can be taken individually to become a successful leader, each field and institution presents its own set of challenges. One of the overarching

challenges with leadership in technical services is the necessity of uncertainty. It is difficult to be seen as a confident leader when the available answers to challenging questions are ambiguous at best. The goal then becomes creating a clear vision that encompasses multiple possible paths, with many opportunities to assess and change direction while still learning from experiences encountered.

The University of Illinois at Urbana-Champaign has, for a number of years now, been embarked on an initiative titled New Service Model Programs (http://www.library.illinois.edu/nsm/). The intent behind the initiative was to build on the Library's traditional strengths (collections and services) and plan strategically for emerging services and operations. Though one of the early New Service Model Programs was Technical Services Coordination and Consolidation (http://www.library.illinois.edu/nsm/techserv/index.html), many of the major shifts in technical services operations and philosophy have derived from the shifts in other areas rather than the original consolidation plan. The greatest changes have been accustoming technical services professionals and staff to working in an environment of rapid change and re-scoping work and priorities to meet current and future needs rather than operating in an environment of business as usual. Change was particularly difficult for those staff who had for many years performed largely the same function and who believed there were very well-defined boundaries to their job responsibilities, but many or even most came to the realization that change can be empowering and even fun and revitalizing.

Technical services units at the University Library learned a great deal from each new program implemented, both in terms of working collaboratively together and also building trust and better communication with the public services units impacted by each change. What was new for each new departmental library involved in the process became old hat to the technical services staff who worked with collection shifts for each change. Technical services staff became so accustomed to changing priorities that a number of staff commented that the unit name should simply be "other duties as assigned." The fact that that was said with a smile and not a frown was a major accomplishment as far as technical services leadership was concerned. In retrospect, it was also a major compliment paid to the technical services leaders who were able to successfully demonstrate that success was not only possible but that ongoing achievements would lead to greater success.

Most of the changes to the University Library as part of the New Service Model Program have necessitated moving collections, often in three ways: from a departmental library to main stacks, from main stacks to high-density storage, and from the departmental library to high-density storage. While each project required a great deal of attention to the specific needs of that collection, many processes became mundane. One of the interesting dichotomies encountered as part of the many collection transfers that have taken place as part of the New Service Model Program was fighting a battle regarding quality control on two very different fronts. Subject specialists who were convinced that centralizing the work would result in poor execution needed to be persuaded that centralization can actually lead to better quality control and consistency in addition to increased efficiency. Technical services staff, on the other hand,

needed to be convinced that working towards effectiveness and efficiency and not perfection would have better, if different, results.

Success came from a variety of avenues. First, subject specialists learned through positive example that by allowing technical services staff and hourly employees to efficiently process materials in bulk, time was left for the highly skilled cataloging staff to fix any remaining problem backlogs at the end of the process. And for technical services staff, it became hard to argue that perfection was required when every piece touched had a level of review and quality control that improved the overall shape of the online catalog. Making rooms full of previously inaccessible material accessible and available to patrons, albeit not with perfect cataloging records, was a very visible improvement over the previous state of affairs.

Moving beyond the New Service Model Programs, the technical services units of the University Library have successfully incorporated many of the lessons learned into ongoing project work. The University of Illinois, as with many institutions, is currently investigating the next phase of discovery and ILS systems, and will likely need to migrate to at least one new major system in the next few years. As national trends show us eventually moving away from MARC cataloging altogether, towards BIBFRAME or other alternative models, and as we move away from local conventions such as “exceptional” Dewey classification, we need to be able and willing to be flexible. We need to accept good enough as good enough, and move forward knowing that we can’t hang onto the way things used to be. Whether the next successful model is crowd-sourcing, or something else potentially equally frightening to the technical services mindset, positive leadership will be key.

Building Blocks for Success

Not only are there multiple paths to successful leadership, leadership does not have to happen overnight, rather successful leaders can be grown over time. One way to help facilitate that for yourself or for others is to set a series of short- to mid-term goals that, upon successful completion, build a sense of personal accomplishment and institutional trust. Building that sense of accomplishment, both for the leader(s) in all capacities and all the team members, is one advantage of scoping work as projects rather than ongoing work as usual. For one thing, knowing that there is an end in sight makes change much less fearsome. Eventually, as one project leads into the next, and success builds on success (or failure), the concept of ongoing change is a constant rather than an unknown. Given uncertain budgets, changing staffing levels, and pressure to be more efficient, scoping work in terms of projects can help inform future needs and resources as well.

As an example, a transfer project from a few years ago which required technical services staff to transfer over 120,000 items from main stacks to off-site, high-density storage in a matter of a few months led to a much greater understanding of what can be achieved with hourly employees, and tangible evidence of the impact and costs of such work. Contrary to previously held belief, the estimated cost per item for subsequent transfer projects went down to $1 per item as long as the project was large-scale. In other words, the larger the scale the cheaper the per item cost. Previous estimates had been based on the cost of outsourcing cataloging work,

which ranged anywhere from $5 to $25 per item depending on the type of material and expectations for the record. By creating as much efficiency as possible for the bulk of materials, those items that needed special attention were caught and dealt with in a separate workflow. One way the cost for project work can be driven down is through the employment of hourly workers hired to fulfil specific project goals.

In addition to numerous changes in priorities due to shifting long-term strategic plans, such as combining departmental libraries in new ways to meet changing institutional needs, increased staffing pressures have resulted in a number of changes as well. As noted in an article titled "Tiered Staffing for Technical Services,"

> Tiered staffing, specifically temporary tiered staffing hired for special projects, offers several advantages. Tiered staffing can allow the library to continue to investigate and test various options before making commitments to permanent staffing that are arduous to change. Hiring and training to address particular needs allow permanent skilled staff to spend their time as efficiently as possible, taking advantage of their experience and skills while temporary staff absorb as much of the mainstream work as possible (Laskowski and Gao 2011, 239).

Investigating new staffing models has been particularly successful in creating new workflows for the acquisition and cataloging of foreign language materials. It is not necessarily an effective solution for institutions to hire permanent staff to work with specific languages, particularly for languages or groups of languages where there may be backlogs but not enough incoming material to warrant long-term work. Instead, at the University Library it has proven extremely effective to hire hourly employees with specific language skills and restructure the workflow such that the hourly employees with little to no cataloging experience can search for existing copy, and then pass the information (either copy record or in some cases sufficient information to build an original record) on to a permanent staff member with the requisite cataloging experience to update/create, add holdings and items, and classify if necessary. The duration of employment for the hourly employees is then dependent on available project funding and size of backlog needing work, while the permanent staff continue to build their expertise in areas of perpetual need.

Another major benefit to scoping work as projects is that different individuals can take ownership of various projects and try out new methods, workflows, and ideas without the institution investing long-term. It is a difficult sell in the current library environment to invest new money in weeding, inventory control, catalog maintenance, or other staples of ongoing technical services work. However, by finding areas of overlap, new projects can accomplish new priorities and as many other tasks as possible. "Rethinking workflows as projects rather than business as usual can encourage higher productivity, minimize the number of times items need to be touched, and generally create an environment that rewards accomplishment" (Maddox Abbott and Laskowski 2014, 161). While successful project work can build trust both on the part of the staff and the administration, one of the greatest challenges in becoming a leader through successful project work is that a truly successful project appears effortless. To large degree that

can be extrapolated to technical services in general, the better the work and process are performed the less visible it is to others in the library as well as patrons.

Changing our Image and Updating our Mission

One way that leaders in technical services can help overcome the challenge of invisibility is to stress the importance of good public relations within the library, across the campus, and in the broader library community. What can seem obvious to the people who are closest to a project or service is often opaque to others, so interpreting no feedback as positive feedback can be a mistake. If a service or project requires specialized skills, time and energy, and represents a change or has an impact on patrons or the rest of the library, it may remain an uncelebrated success unless attention is brought to it specifically. “Midwest modest” (an extreme reluctance to articulate personal success) can accurately describe not just librarians in the Midwest, but often librarians in general and technical services librarians especially. Developing a habit of not only tracking successes but reporting out progress on a regular basis can help build a better understanding of the challenges and opportunities technical services work provides. Ideally, current work can serve as fodder for research, recognizing expertise and also building greater understanding of the issues in the profession.

It is an unfortunate reality that even within the library or institution there are misperceptions about technical services work. Historically, there have been a number of movements from centralization to decentralization and back again, and with varying degrees of support and recognition of the importance of technical services work. In the late 1980’s here at the University of Illinois there was a significant change to the organizational structure which led to the dispersal of technical services librarians to the departmental libraries. The idea was that the decentralized librarians would not only continue to work on bibliographic and cataloging work, but also become subject specialists with a wide range of public service responsibilities. The existing subject specialists would then also pick up some responsibilities in the areas of bibliographic and cataloging work. While this experiment was deemed by almost all to be a failure, and technical services has been working on fully recentralizing ever since, an unintended side effect was to highlight some of the previously unspoken tensions between public service and technical service librarians, allowing the opportunity to begin to improve communication and address formerly unacknowledged concerns.

Leaders in technical services have the opportunity to shift perceptions in several ways. First, though managing operational and production-based units is extremely time intensive, producing quality scholarly research, presentations and publications help to highlight the intellectual nature of technical services work. Second, as technical services managers look at adjusting job requirements to better reflect current needs for updated skill sets, there needs to be a focus not only on new technology skills but there also needs to be a shift away with the idea that technical services requires introverted, detail-oriented people but not flexibility, collaboration, and good communication, etc. As part of that effort it should be recognized that collaboration between technical and public services units and people creates an excellent symbiotic relationship, but recognize that technical and public service people are not interchangeable. Also important to recognize is that librarians and staff are not acquiring,

cataloging and preserving content for ourselves, but for current and future patrons. As patron-driven acquisitions, outsourced cataloging, and new models of staffing continue to expand, the idea of patron needs and not library preferences needs to remain front and center in the decision-making process.

Beyond collaborating within our own institutions, collaborating with other institutions and organizations will help us to provide access to shared collections (print and electronic). Cooperative cataloging and data wrangling, based on the premise that what benefits one benefits many, has the potential to change the future of technical services, but only if individuals take the time and effort to bring their institutional priorities together. As advances in interlibrary loan and electronic access continue to make sharing materials easier and faster, patrons will have broad access to core materials, allowing institutions to focus locally on unique strengths. In order for any of these new models to succeed, technical services will require strong leaders with the right mindset and skills to move the profession forward.

Conclusion

There are many factors for successful leadership in technical services, including:

- Focusing on communication
- Engaging in collegial discourse regarding the strengths and weaknesses of technical services work within the institution
- Being flexible in pursuit of changing goals
- Helping to inform the profession through targeted research, presentations and scholarly publications
- Collaborating effectively and learning from the past
- Working outside your comfort zone
- Planning for ongoing transformation of technical services
- Setting goals and sharing successes

Most importantly, don't forget the human factor. As corny as it sounds, a potluck or milestone celebration of any kind can go a long way towards building the positive relationships that leaders rely on to achieve success. Key in those relationships is good communication, including recognition that great ideas can come from anywhere in the organizational structure. Also, build on previous success, but demonstrate that change is a positive process, whether the current endeavor is a success or a failure. Map out a path towards success that has many options, with many completion points with a chance to reassess directions. Finally, promoting flexibility and a culture that accepts change needs to be balanced with reassurance that change won't happen for the sake of change alone.

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