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Library Technical Services: Adapting to a Changing Environment

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Library Technical Services

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Library Technical Services

Adapting to a Changing Environment

Edited by Stacey Marien

**Charleston Insights in
Library, Archival, and Information Sciences**

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Preface

In 2014 I co-presented with my colleague Alayne Mundt at the annual Charleston Conference for libraries. We described the first collaborative project between our two units, resource description and acquisitions. Alayne and I were relatively new as the heads of these units and we knew that we wanted to work more closely together. The presentation at the conference discussed how our units collaborated to develop a workflow that more quickly moved shelf-ready books out of technical services and into the library collection. At the same time, we submitted an article about the same project to the journal *Against the Grain*. Just before the conference, Katina Strauch, the editor of the journal, contacted us and requested to meet while in Charleston. At that meeting, she proposed that Alayne and I co-edit a column in the journal called Let's Get Technical that focused on technical services issues. Our column was first published in April 2015. Subsequent columns have focused on contemporary problems in technical services departments and how the units responded. Over the years, we have featured many stories from our own library at American University as well as contributions from other libraries. After being involved with *ATG* for a couple of years, Katina suggested a book as an extension of the column, with a variety of chapters from different contributors explaining their solutions to real-world problems. With her encouragement, I agreed and *Library Technical Services: Adapting to a Changing Environment* was born. As editor, I have recruited authors and solicited a variety of new chapters that I hope will be of interest to a wide range of librarians, library staff, and library and information science (LIS) educators and students. The chapters featured in this book have not appeared in the Let's Get Technical column for *ATG*. This book is intended primarily for practitioners working in library

technical services, but when possible many of the contributing authors have provided scholarly citations to other relevant professional literature. Knowing most readers will likely not read the book from cover to cover, I have organized the chapters into meaningful categories of challenges faced by library technical services units. I hope this decision will make it easier for readers to find single chapters or subsections of most interest and relevance to their needs.

Library technical services operations, workflows, and tools are constantly evolving and changing. However, the challenges for technical services staff and managers are much greater than just constant evolution. Administrators, funders, and even library professional associations are questioning the relevance, utility, and viability of technical services in today's world of library services. It seems even those in our own libraries don't understand what we do or our contribution in curating, managing, and providing access to our collections. Technical services departments face serious existential threats in many libraries. Stories of technical services units and functions being relocated or even outsourced outside the library are common, with various justifications ranging from shrinking print collections to budgetary constraints and other reasons.

Thankfully, our community also is hearing more stories about technical services departments adapting and reinventing themselves in response to these challenges and threats. Strong advocates and innovators are embracing the opportunity to experiment, collaborate, and help our libraries adapt for the 21st century. This book contains many such stories. It begins with a conversation between a new librarian starting her career and her colleague, who is in the later stages of a long career. Following are a series of case studies of many different practical issues that technical service librarians are facing. There are chapters on diverse topics such as downsizing print collections, the relevance of government documents in a digital era, the challenges of supporting a distance education program, cataloging issues in a metadata world, staffing issues and challenges, effective collection development and management, and tips for setting boundaries when dealing with vendors. Other topics discussed in the book include how to manage the stresses of relocating technical services to off-site locations, reinventing technical services workflows, and creating new collaborations and partnerships. I hope that readers will find

both inspiration and practical advice as well as examples for solving issues their technical services units may be facing.

Sadly, while this book was in its final editing phase, contributor Emily Hicks passed away on October 7, 2019, at the age of 50. She will be greatly missed by her friends and colleagues.

I wish to thank my colleague Alexandra Ogilvie for her thoughts and ideas on this project. Additionally, I must acknowledge several friends and colleagues for additional help with this book: Alayne Mundt, Michael Fernandez, Charles Thomas, and Lisa Kallman Hopkins, a contributor who put together the final bibliography. Special thanks go to my partner, Sean Casey, for all the support he gave me while I was working on this book.

*Stacey Marien, Acquisitions Librarian
American University*

INTRODUCTION

The Challenges Facing Library Technical Services: A Dialogue

Rebecca Ciota and R. Cecilia Knight

In this introduction to *Library Technical Services: Adapting to a Changing Environment*, early career technical services librarian Rebecca Ciota and veteran technical services librarian R. Cecilia Knight discuss how we view library technical services. We provide our insights into what technical services are and the associated skill sets required. We also discuss our on-the-job as well as educational experiences that helped us arrive at our current positions at Grinnell College Libraries. And we ruminate on the past, present, and future changes in technical service work.

I am Rebecca Ciota, the discovery and integrated systems librarian at Grinnell College Libraries. I have served in that position since July of 2016. Previously I was at the University of Illinois at Urbana-Champaign (UIUC) as a graduate student and graduate assistant in the University Library's acquisitions unit. I graduated from UIUC's Graduate School of Library and Information Science (currently the iSchool) in May of 2016.

I am R. Cecilia Knight, the acquisitions and discovery librarian at Grinnell College Libraries and have worked at Grinnell since August of 1993. Previously I was principal catalog librarian at the University of Arizona Libraries and catalog librarian at Oklahoma State University Libraries. I earned my MLS at Rosary College (now Dominican University) in January of 1982.

We formulated the questions below through sitting down and discussing the changes we have seen in technical services work as well as attitudes toward such work.

Let's start out with the question of "What are technical services?"

REBECCA: Technical services can be difficult to define, since they are most often described in contrast to public services. Public services staff work directly with the patrons, whereas we in technical services seem to have a degree of separation between our work and the patron because we don't normally work face-to-face with our patrons. To define technical services without comparing them to public services, I would say technical services are library-related activities that ensure information is available and discoverable. Technical services staff select, identify, acquire, describe, organize, process, and provide continued access to the materials. We also maintain the technology that supports the organization and discovery of those materials.

CECILIA: I agree that this is the traditional perception of the division of work in libraries. A few years ago, our library decided to rename our technical services "library services" because these functions support and facilitate the overall work of the libraries. We provide library services to patrons via the many functions we perform, which include tasks requiring extensive technical skills such as acquisitions, cataloging, and systems; interpersonal skills such as supervising and negotiating; and research skills such as identifying content, doing overlap analysis, and tracking down resources.

You have established this dichotomy between technical and public services. Can you elaborate on the different skills needed for either one?

CECILIA: When I was pursuing my MLS in the early 1980s, it seemed technical services required focusing on details and following specific procedures. Technical services staff used computers and standard reference materials and wrote procedures. Public services required a person who could perform a reference interview and was comfortable with indefinite processes.

REBECCA: While pursuing my MLIS from fall of 2014 to spring of 2016, I did not notice such a distinct difference in skills between technical and public services. The people who seemed most committed to technical services studied data science, metadata, digital preservation, and audiovisual preservation. The people who seemed wholly interested in public services studied readers' advisory,

services for diverse patrons, instruction, and children's librarianship. But most of my classmates took courses in both technical and public services functions.

The differences between Cecilia's and my graduate experiences is probably because the skills and aptitudes needed for all areas of librarianship have changed. As a heuristic, I like to think of functions like systems, cataloging, processing, acquisitions, preservation, and conservation as traditional technical services functions. But technical services have expanded beyond that. Now, we have new fields like e-resources management, digital preservation, data management, data science, digital publishing, and the definition-eluding digital humanities that could fall under the umbrella of technical services. Technical and public services librarians both need project management and social skills in much the same way, and public services librarians need a decent amount of technical skills to navigate the current information environment. It seems more positions in libraries are a hybridization of traditional technical services and public services roles.

How did you discover technical services work?

CECILIA: In library school, cataloging was SEEN as basic to librarianship. Therefore, we were required to take a class in cataloging in the first term; advanced classes were also offered. I wrote papers about thought leaders, like S. R. Ranganathan and Charles Ammi Cutter, and about library organizational topics. I am still influenced by these seminal ideas of focusing on the reader or user in my approach to library administration, management, and day-to-day work. I gained experience as a graduate assistant with various technologies, such as media production, computers with attached dot matrix printers, and OCLC terminals.

REBECCA: During graduate school, I held a preprofessional position in the University Library's acquisitions unit. The acquisitions unit purchased, cataloged, and processed most of the materials, both physical and electronic. In my role in the acquisitions unit, I gained experience selecting, ordering, and receiving items. I also worked on several e-resources management projects, and I even gained experience copy cataloging.

How did you acquire training for technical services work?

REBECCA: I received the bulk of my early training in technical services from my preprofessional position in a library acquisitions unit, a traditional technical services area. I also had coursework on technical services concepts. For example, I took courses in metadata creation and digital preservation. However, my impression was that my library school did not address the traditional technical services. I often knew more about technical services than my professors, who often had a somewhat outdated or ungrounded understanding of what technical services did. My professors often had never worked in a technical services role and therefore had never seen a complete picture of the work technical services librarians and staff do. And often, my professors had spent several years—if not decades—out of libraries, working on doctorates in a variety of fields and then teaching. Due to my preprofessional position, I had a much more up-to-date and grounded understanding of technical services.

CECILIA: As I went onto the job market my mentor counseled me to apply for jobs at large institutions to develop as a cataloger. My first professional position was at Oklahoma State University in 1982, where I received wonderful mentoring and training. The catalogers and library assistants were all in an open office area where we could easily consult. This was in the days of implementing the Anglo-American Cataloguing Rules (AACR2) and updating headings in the card catalog using sticky strips and typewriters. The knowledge, skills, and abilities that I brought were having up-to-date training on AACR2; being able to contribute to a request for proposal (RFP) for an online catalog due to my undergraduate computer science coursework; having experience with OCLC from interlibrary loan (ILL); and being familiar with media from doing classroom support as an undergraduate and graduate student.

REBECCA: Cecilia mentions being told by her mentors to go to a large library to develop herself as a cataloger. No one told me to do that. I went immediately to a small institution. I can see the benefits of starting somewhere large, where you can specialize in a field and have mentors who have moved up from your position to more senior ones. However, I wanted a wide variety of duties,

and a smaller library like Grinnell College's offers a spectrum of opportunities.

How did the culture of the library where you had/have your first professional job affect your development?

REBECCA: In my current professional position, most of my training comes from the senior librarians at Grinnell College, who have taken it upon themselves to mentor me in technical services, server administration, and being a faculty member.

Cecilia also talks about the skills and aptitudes she had when entering the job market for the first time: up-to-date training on AACR2 and newer technologies. Like Cecilia, I had experience in technical services, though my experience was in acquisitions and e-resources management. I also had some experience with new technologies and platforms, having worked with self-checkout machines and video streaming in previous positions. The experience in acquisition and e-resources, I believe, was paramount to my success in interviews. My working style may have increased my appeal as a candidate. Former coworkers and references cited my willingness to experiment, document processes, and teach as one of my strengths. I was put in charge of more than 250 Chinese-language materials when the Chinese acquisitions specialist was on leave. Some people would have been overwhelmed by the characters; I simply developed a system to make sure all the books were accounted and paid for. In technical services, plenty of new and complex problems arise; it helps to be comfortable at least trying to resolve the problem in a calm and systematic manner.

CECILIA: In my first job, I sought out reasons to interact with the public services staff. My public services colleagues were very accommodating in providing cross-training opportunities at the various reference desks. This made it possible for my technical services work to be informed by how I observed and experienced the library being used. I have made sure to integrate public interaction, including research assistance, teaching, and providing backup for circulation service points, in each of my workplaces. These are locations where many patron needs and difficulties are identified.

How have technical services changed since you started your career?

CECILIA: In the first two libraries I worked in as a professional, the main card catalog held cards for the entire collection and then each service point had smaller card catalogs with cards related to the materials in that location. Library staff assistants filed cards in the card catalogs and the catalogers checked and dropped the cards. Alphabetization was an essential skill for technical services staff at all levels.

When we stopped filing cards and implemented an online catalog, we still maintained a card shelflist for several years. Staff jobs changed to spending almost all their time in front of screens. Work hours in these early years were structured by what system you were working in. You needed to schedule time at a different networked terminal for each system: one for OCLC, another for the integrated library system (ILS), and other for email. Technical services librarians and staff came in at odd hours to do systems backups and run updates and jobs. Later, Windows computers that allowed multiple client software installations allowed people to work at their own desks and move back and forth between systems as they worked. We integrated email and calendaring into our workflows as well and now use a variety of tools for database cleanup projects. Decisions are kept track of in email folders rather than on printouts, and reminders are added to online tools rather than paper calendars.

REBECCA: My career has been briefer and has not seen as much change. But I think the most interesting things that have changed in technical services during my career are not because of the changing information landscape or technology but because I made the switch from a large public research institution to a small liberal arts college.

At the large research institution, where I went to library school and worked as a graduate assistant in the University Library's acquisitions unit, there were so many resources—in terms of the sheer volume of print and e-resources we bought and provided access to, in terms of money spent, in terms of staff comparatively. At a smaller institution, resources are less extensive. Yet at both institutions I have seen increasing difficulties in accessing information. Having been in acquisitions, I know that one glaring

difficulty is the increasing prices of e-resources and print serials, as library and institutional budgets either stagnate or shrink. Libraries of all types and sizes seem to innovate and collaborate on obtaining and accessing as much information as possible. Both institutions I have worked at are major players in various consortia that work to negotiate group pricing. Collection development, acquisitions, and e-resources librarians are pushing new buying models as well. Besides consortia and group purchasing, they have been experimenting with patron-driven, demand-driven, and evidence-based acquisitions to buy only what the patrons need, want, and use.

I have not been a systems librarian for very long, so it's difficult for me to discuss in detail how systems work has changed. But I do have somewhat of a historical perspective. Before ILSs became commercially available, there weren't systems librarians but instead head catalogers. With the implementation of ILS, the need for a librarian to manage the system emerged and the systems librarian was born. Cecilia mentions how first hardwired terminals were needed, and then the local area network (LAN) grew. More and more technology entered the library, and the mainstreaming of the Internet accelerated that further. The systems functions of technical services grew from no one (pre-ILS) to several people. Now, I have a staff that handles the ILS, the institutional repository (IR), virtual servers, and all variety of software and hardware.

As someone who grew up with the Internet, I had some sense that there was *so much* information available that patrons could be overwhelmed. Search engines can provide millions of results in mere milliseconds. In some ways, that's great. It means that technical services librarians can provide our patrons with more information than ever before: we are less constrained by geographic location and physical space. From my work in acquisitions, I saw plenty of the assessment and evaluation that goes into choosing and weeding resources.

Due to this incredible proliferation of information, I see how monumental the task is of making everything accessible and discoverable. Each system presents its own challenges. Technical services librarians work hard to ensure that all patrons

can discover, access, and use information. Additionally, even in my short time as a technical services librarian, I have noted the increasing attention we are paying to accessibility in the resources we purchase as well as those we create.

CECILIA: I think that the biggest change in terms of performing and hiring for technical services jobs is how dynamic and far-reaching our jobs are now. I will contrast this with my first five to eight years in library technical services. Unlike the present, my work was highly structured: I knew what kind of work I would do, what technology I would use, when I would have access to each library system, and when I would take breaks and go home at night. As we moved into our first ILS that provided significant discovery opportunities to the public, we also started thinking about how to move from CD-ROMs and individual databases that we could log into remotely. Link resolvers were another necessary development to aid patrons in accessing the materials they were finding. This re-visioning of service to our users made our work life far less predictable. We are always making changes to how we do things as the various parts of the system shift and change.

We technical services librarians—and many staff members too—now need to be project managers capable of taking a solutions-based approach to responsibilities, identifying problems and the resources needed to resolve them, creating documentation, and supervising people. At the same time that the Internet can identify everything, we strive to find ways to put our solutions into users' workflows.

Initially the big changes for us were that more institutions had loaded their records into OCLC. This meant more records, more duplicates, more change requests, more merged records, more call numbers, more typo correcting, more series work, more authorities work, and so forth. As we moved from card catalogs to online catalogs, we had opportunities to provide additional access through entries for people, institutions, subjects, tables of contents, summaries, and the like. This ability has caused a philosophical shift from scarcity to abundance in technical services work.

Librarians mapped the card catalogs directly to the online catalogs that replaced them. As we wrote our first RFPs and dreamed

of a new world of online discovery, we asked for the ability to search across multiple indexes, apply Boolean logic, and search by keywords. Keyword searching of records supplemented with abstracts and tables of contents provided greater depth in search and created some of the serendipity enjoyed when physically browsing the collections.

In acquisitions, we started sending orders electronically, rather than typing and mailing orders. Many libraries implemented approval plans and standing orders to cope with the explosion in publishing.

Another big shift came later as we got into the knowledge management and then digital scholarship business. Our technical skills are very much in demand for creating databases with the goal of identifying materials.

The shift to digital content caused significant change for technical services. We have spent years developing satisfactory workflows for materials we never touch, while continuing to ensure excellent service for patrons. We batch upload records and find ourselves trying to monitor intangible objects, all while we still have existing workflows for the physical collections. For print materials, any problems could be assumed to be unique to that individual record. With batch-loaded e-resources, we must go back and analyze the entire collection to make sure that this is not a systemic problem.

Over time, we added or repurposed staff positions to focus on the invisible but large task of managing e-resources. There is little sense of craft in relation to e-resources management. It is all about importing metadata, protecting data, and merging data to ensure and preserve access.

Acquisitions staff must ascertain, using a variety of databases and tools, that we don't already have each specific title that is requested. It is challenging for patrons to identify known items in our discovery systems. The staff handling the requests need to verify whether we truly don't have it against the catalog, as well as any electronic packages we have paid for.

The move to e-resources has also required the development of expertise in licenses and accessibility. Many libraries now have e-resource management specialists and electronic resource

management systems (ERMS) to help keep track of this additional data and information. ILL and reserves are impacted by terms of use negotiated in licenses. These were not considerations with print books and serials.

REBECCA: I will follow up on some of Cecilia's comments because my remarks might provide some insight on how much technical services have changed. Cecilia started working when card catalogs were the system of discovery for library materials. I was born after the advent of the ILS, during the widespread implementation of online public access catalogs and in the twilight of card catalogs. I remember a card catalog at the local public library that no one used; and I remember encyclopedias on CD-ROMs. This was all before I turned 10 years old. I was in grade school and middle school when e-books became a viable option. By high school, I was reading popular fiction as e-books and my high school library staff constantly pushed e-resources.

Thinking about how much information dissemination and consumption has changed astonishes me. For example, I don't know what I would do when faced with making an encyclopedia on CD-ROM accessible for users. But it was my senior colleagues who wrangled that problem, and several other challenges. We will undoubtedly be challenged in the profession by new modes of information dissemination, and probably in the not too distant future.

How do you see technical services changing in the future?

REBECCA: Currently, technical services can be siloed, particularly at larger institutions. For example, when I was working in a large research library's acquisitions unit, I did not interact with the public. That, however, was starting to change as I left. I had been encouraged to work on the chat reference desk, and I know at least one of my former coworkers was encouraged to provide instruction sessions related to e-resources.

Now that I am at a small liberal arts institution, we do not have the personnel to silo people. I have my systems work, which includes managing people, the ILS, our IR, our virtual machines, and our hardware. But I am also required to liaise with academic departments and teach library instruction sessions. I see technical

services librarians having roles that blend traditional public and technical services functions.

I predict that technical services functions will continue to integrate with public services functions. As e-resources become more and more the norm, either public services people will need to be trained on e-resources troubleshooting, or technical services people will be drawn out of their basement offices to provide on the spot support for digital materials. As digital institutional repositories grow in popularity, the work of scholarly communications and digital scholarship librarians will be crucial for improving and growing collections. We in technical services will need to work just as closely with collaborators to ensure that objects are discoverable and that the systems work appropriately.

I also foresee that nontraditional technical services functions will grow in prominence. Those nontraditional roles that are likely to grow are IR management and development, digitization, data science, bioinformatics, digital preservation, and e-resources librarianship. Much of our information is now digital, and our technologies for creating, storing, and accessing this information are changing at exponential rates. We risk losing our information if we no longer have the original technology to access it, so digitization and digital preservation will increase. Shared bibliographic records, like those from OCLC, will push records to become more generic, with a variety of origins and types of updates. That will make traditional cataloging rarer as institutions will only need catalogers for their original cataloging. This will further streamline various workflows in acquisitions, processing, and ILL. Libraries will likely always have those traditional technical services functions but not be staffed at current levels. My own position will grow more dependent on facility with coding languages and metadata schemas as systems grow to encompass both new and traditional technologies and resources.

CECILIA: As a technical services manager, I have always emphasized in all decision-making that the users are at the center and we need to take actions that will improve their experience. With the move to e-resources it has been difficult for staff to realign their work with new realities and perform new tasks.

Along with what Rebecca has mentioned, the major change that I see is the focus on the local. Pamphlet files and other small local collections were always the purview of public services staff and archivists. Special collections materials were held close and only the staff knew what wonders existed. Catalogers handled mostly mainstream published materials and focused on production and numbers. Now we focus on doing artisanal-level cataloging for our most unique items and we tell the whole world that we have them. Standard published materials arrive as e-publications or shelf-ready.

We have added IRs and digital asset management systems (DAMS) and created metadata for our local collections of pamphlets, posters, photographs, letters, and other primary documents, making them discoverable by the wider world. Large shops may have specialists for each of these systems, but at a small library we collaborate, and each bring our expertise to these systems.

We see this change reflected in our titles and job descriptions. A few years ago, when Grinnell College changed its logo and directed people to order new business cards, we decided to realign our titles with our librarian job duties. All the librarians changed their titles to communicate what their evolved positions now included. The systems librarian became the integrated systems and discovery librarian; the public services librarian became the humanities librarian and coordinator of research services.

Our firm orders enter our collections with minimum staff intervention as shelf-ready materials. Additionally, our e-book records come with the URLs for our institution created by the vendor. With the focus of OCLC WorldCat moving to be a global discovery tool for individuals, rather than primarily a tool for technical services staff, we are less attached to the records. It is now more important to have the most up-to-date version of each record to facilitate interlibrary lending, which is also far more patron driven now.

Our physical collections are no longer the largest part of our collection. Serials have moved almost exclusively online, and books are following, except for specific areas. Serials units are shrinking as we order, check in, and bind fewer print titles and use outside services to manage our aggregated subscriptions.

When I conduct interviews for technical services positions, I look for people who care about details, but I don't test their alphabetization skills. I am also looking for people who can interpret and apply guidelines rather than strictly follow rules. I need people who like to solve problems and puzzles, because that is where more of our time is focused. Instead of focusing on numbers of titles, we focus instead on how their work forwards the libraries' and the campus's strategic plans and goals.

CONCLUSION

Libraries have taken advantage of the opportunities afforded by the globalization of access to knowledge. Perhaps more than most local institutions, our day-to-day activities and services have been transformed by the Internet and the ability to deliver content in electronic formats.

Library technical services have found themselves bridging the physical and electronic collections. We are reaching a point now where we can deliver satisfactory service for both types of material. The skill set needed by technical services staff will continue to evolve as, for example, facility with coding languages and metadata schemas grows in importance.

The focus will continue to be on providing the best services to our communities, but with the added challenge of making our users aware that they are using their local libraries as they interact at a more global level.