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Let's Get Technical — All Hands-on Deck: Collaborating Across Library Units to Tackle Streaming Media Ordering



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Column Editor Note: *In this issue's column, we feature the story of one library trying to determine the best way to manage the purchasing of streaming video. Mary Wahl, Technical Services Librarian, Pasadena City College, describes the positive experience she had at California State University, Northridge with working on a committee to develop a better workflow for the purchasing of streaming media. —SM & AM*

Anyone who has worked with collection development and acquisition of streaming media knows that managing the format doesn't fit squarely into one library unit, let alone a single staff role. The format demands a myriad of requirements to work with it, ranging from technological know-how to time and patience for hunting down rights holders with hope of negotiating streaming permissions. The **Oviatt Library at California State University, Northridge** has been collecting streaming media since about 2010, with a mix of licensed and purchased single titles and large vendor-curated collections. Much of the streaming media has been added per faculty request for specific titles and content matter, and by 2014 requests were coming in fast and many. Unfortunately, the uniqueness of working with the format was causing a bottleneck with ordering. The biggest obstacle: we needed a new workflow for dealing with streaming media.

In September 2014, library administration took note and called for a Streaming Video Decision Tree Committee to be formed to create a workflow for media ordering. Two key outcomes emerged from the committee. First, excitingly, was a new workflow in the form of a decision tree. This workflow is in place today with occasional adjustments. Second (and equally exciting to the author) was the accomplishment of solid teamwork and collaboration of library staff with varying expertise and backgrounds when it came to media collections. Even now, a couple years later, committee members speak highly of the experience and have considered performing the work again for other challenging formats collected by the library. Following are a few elements that contributed to our collaboration in developing a decision tree workflow for purchasing streaming media.

“Buy In” from Stakeholders

First, one of the key advantages to the team's success was that the decision tree project had deep support from many units across the library. Library executive management was a primary stakeholder and provided the team with its official charge. Executive management also provided valuable input to final drafts of the decision tree. Additionally, the library had many staff members whose work would likely benefit greatly from the project. For instance, the Music & Media department was contending with figuring out the various pieces of information needed for requested content before forwarding on to the acquisition unit; librarians with liaison duties were facing the challenge of there not being a singular method to request new video content for the library. Challenges such as these were to be addressed as part of the committee's work, which led to a strong interest across much of the library for this project to succeed.

It was also invaluable for the committee to have representation from a mix of units across the library. Our team comprised of five members holding the following roles: Collection Development Coordinator; Music & Media Librarian; Music & Media Supervisor; Acquisitions Specialist; and the author, Digital Services Librarian (and a cataloger), who would also take the lead in coordinating the group's work. Members came from both public and technical services units, and two members were also on the library's Copyright Team, which came in handy for discussions of licensing terms.

Brainstorming Sessions

When the committee first began to meet, we didn't quite know the extent of all the challenges we were dealing with, and so our first meeting was primarily spent with each team member sharing the difficulties of working with streaming media. For instance, the acquisitions unit was up against finding streaming licenses that may or may not exist on the market (a process that often feels like chasing a moving target); the Music & Media department was up against high expectations of faculty who presumed that requesting a streaming title simply involved clicking a button to “turn on” content. Interestingly, upon sharing the challenges we were each facing, we could see that there was overlap in many areas. For example, both the collection developers and the acquisitions unit needed to know if captions were included in titles being purchased (collection developers so that they could inform their faculty in case a captioning request would be needed, acquisitions so that the library wasn't agreeing to overly-restrictive licenses that forbade such modifications). Detailed notes were taken by the author at this first meeting and shared out; the “big picture” of what we needed to solve was thus set.

Our second and third meetings were whiteboarding sessions. For each of the issues brought up in the first meeting, the committee discussed what data was needed and where that information came from, thus forming an extensive list of questions. For example, most team members needed to know when a specific title was needed by (for reasons ranging from media funds not being available 12 months a year, to titles requiring “self-hosting” and needing extra time to set up), and this information comes directly from the faculty member making the request. It was during these whiteboarding sessions that the team realized that many of the challenges streaming media produced for the library fell into six categories: purpose, genre/content, medium & format options, licensing terms, delivery mode & options, and costs & funding.

The committee's next meeting took a hands-on method: we took each of the questions gathered in the previous session and printed them onto single pieces of paper, spread the collection of questions across a table, and put the questions in order of which needed to be resolved before moving on to other questions. With this activity, the team excitedly had the beginning framework for a workflow.

Meetings were 120 minutes in length and held about twice a month. Momentum between meetings was kept by asking team members to assess meeting notes (both those taken by the author/team leader and those captured in photos of the whiteboards), and by team members having a great deal of buy-in to accomplish the task at hand.

Workflow Tools (Some Hits, Some Misses)

Following the whiteboarding and paper cut-outs sessions, our team was ready to start placing a workflow into fixed form. Unfortunately, most of us admittedly did not have much experience in drawing out a workflow or decision tree chart, so we certainly had some homework to do first. A couple resources stand out as having been useful. First, though not specific to media, the book *Electronic Resource Management Systems: A Workflow Approach* provided a helpful overview to workflow analyses for other electronic collections.¹ Second, the author found the “common shapes” section of the Flowchart article on Wikipedia to be handy in providing an overview of decision tree symbols and their meanings.²

When it came to software and tools for expressing the workflow, the team considered a couple applications such as Prezi and Visio before settling on Word. (Visio would have been useful, but the team did not

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cultural institutions including libraries until relatively recently. **Tilley** highlighted a seminal article published in *Serials Review* in 1998 by **Michael Lavin** on "Comic books and graphic novels for libraries: What to buy"³ as an important contribution to the growing interest in comics collections and the study of comics. She noted with satisfaction that interest in this genre continues to grow. One of **Tilley's** slides stated, "Most important: comics tell stories and communicate ideas, often in emotionally evocative and cognitively efficient ways," which summed the situation up rather well.

Admittedly, as its current president I am biased, but I think **NASIG** represents one of the best professional development opportunities available and at a lower cost than similar organizations and conference events. I encourage readers to consider attending next year's conference in Atlanta which will feature the theme, "**Transforming the Information Community**." Remember, too, that **NASIG** is more than a conference. As one example, it is an active participant in important standards development as an organizational member of **NISO** and **Project COUNTER**. **NASIG's** non-profit status is also noteworthy. Whether you want to attend a conference or participate as a volunteer on a committee, you are all invited to become part of the engaged and supportive **NASIG** community! 🌸

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have access to a copy of it and did not seek out its purchase because our project was short-term.) With Word being installed on most workstations in the library, the team decided to use the application and flesh out each of our six categories of the decision tree (purpose, genre/content, medium & format options, licensing terms, delivery mode & options, and costs & funding) within a single page. The main drawback to using Word was that manual copying/pasting of shapes and arrows was required. However, the Word files were easy to share and edit among team members, each of us were already very familiar with using the application, and it was easy to print and share the workflow with stakeholders.

Deadlines & Test Runs

Having a firm deadline to produce a draft decision tree by December 2014 to library executive management was the primary driving force behind completing the workflow in a timely manner, and the committee used this as motivation for keeping strong momentum. With this deadline in mind, as well as the interest and support of many staff and library units, the committee delivered a multi-page decision tree workflow to executive management before the 2014 holiday break.

Of course, being on an academic campus meant that a change such as implementing a new workflow would be best to take place in between

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Presses (AUPresses), effective immediately. **AUPresses** is an organization of 143 international nonprofit scholarly publishers. Since 1937, the **Association of University Presses** advances the essential role of a global community of publishers whose mission is to ensure academic excellence and cultivate knowledge. The membership of the **Associa-**

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Endnotes

1. http://www.nasig.org/site_page.cfm?pk_association_webpage_menu=310&pk_association_webpage=7802
2. **NASIG** has always made a point of supporting and encouraging students into the library profession, awarding several student grants and scholarships each year. Full disclosure: I was a recipient of a **NASIG** student grant back in 1991 and it was my entrée into the profession. My experience back then had such a strong impact on me that **NASIG** has been my professional home ever since. More recently, the **NASIG** Executive Board voted to provide free membership to all currently enrolled LIS students, and as a result, we have welcomed many new members into the work of **NASIG**, including opportunities to serve on committees, which gives students relevant experience that helps their résumés stand out when they are searching for their first professional jobs.
3. **Lavin, Michael R.** "Comic Books and Graphic Novels for Libraries: What to Buy." *Serials Review* 24, no. 2 (June 1, 1998): 31–45. doi:10.1016/S0098-7913(99)80117-8

semesters. With small adjustments, the committee's work was approved by library administration January 2015, which left just enough time for a few test runs before the spring semester began. During one of our last committee meetings, the team took several test scenarios and walked through the workflow together, step-by-step. Satisfied with the outcomes, our team implemented the workflow in full earnest in February 2015.

Conclusion

Two years later, the work completed by the Streaming Video Decision Tree Committee still has a meaningful impact on our library. For instance, the workflow we designed remains in place with occasional adjustments. Additionally, whenever a more challenging video request comes in that doesn't fit squarely into our decision tree steps, the team is able to reconvene and determine an approach in the same collaborative manner as when we first began meeting. In this way, the committee is pleased with its continuing efforts in teamwork. 🌸

Endnotes

1. **Anderson, Elsa.** *Electronic Resource Management Systems: A Workflow Approach*. Chicago, Illinois: ALA TechSource, 2014.
2. "Flowchart." <https://en.wikipedia.org/wiki/Flowchart>

tion voted in June to undertake this name change, as part of a strategic assessment of the organization's identity, mission, and goals. The new logo and visual identity that are revealed today are vibrant expressions of the **Association**. The original 1921 proposal to establish the organization suggested the name "Association of University Presses" although it was eventually founded as the **Association of American University Presses** in 1937. "What was once considered the 'American university press' model of editorial independence and rigor is a type of publishing that

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