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Continuity & Transformation: The Promise of Confluence

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Incremental Re-engineering: Changes in the Roles of Technical Services Librarians

Joan Giesecke and Katherine L. Walter

ABSTRACT

The role of technical services librarians is being questioned as libraries downsize their operations. Technical services librarians can take a proactive approach to redefining their roles rather than waiting for change to be forced upon them. At one ARL library, technical services librarians initiated discussions with the administration to redefine their roles, increase their involvement in library decision-making, and improve their own career development opportunities. This paper will describe the process used at one library and how this model can be applied in other settings.

The role of the technical services librarian, particularly the cataloger, has been slowly changing as libraries automate their operations, downsize technical services departments, and place an increased emphasis on direct patron service. Support staff in technical services now handle most of the day-to-day routine activities from the ordering of books and serials to copy cataloging, database maintenance, and authority control work. As support staff assume many of the duties once carried out by professionals, professional librarians are concentrating on original cataloging of items when copy cataloging can not be found, problem-solving, and staff training.¹ Furthermore some technical services librarians are participat-

ing in traditional public service activities including serving at the reference desk, and providing support for bibliographic instruction and collection development.²

Within this context is the question of how individual technical services librarians can advance in their careers and survive in an era of downsizing. These are the practical questions that need to be addressed even as the organization addresses the larger questions of how to reorganize in an era of decreasing resources.

In order to address questions of this nature, Lee Bolman and Terrence Deal, in their book *Reframing Organizations*, argue that managers in complex organizations need to view change from

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four perspectives or frames: structurally, politically, symbolically, and from a human resources viewpoint. Structurally managers review policy and procedures, organizational structure, formal roles and relationships, and reporting lines. From a political viewpoint, managers examine power structures, competition for scarce resources, review negotiating strategies, and seek coalitions. The symbolic frame emphasizes rituals, myths, symbols, and the meaning of work. Finally the human resources view emphasizes the interdependence between employees and the organization, improving the organization's ability to motivate people, and seeking a better fit between individual and organizational goals.³

All these aspects of an organization are affected when change is introduced into the organization. Structurally change alters roles and responsibilities. Formal procedures are disrupted and policies need to be revised. Politically change generates conflict. Issues need to be brought to appropriate arenas to be negotiated and resolved or issues will remain as disruptive elements in the organization. From a symbolic viewpoint change creates a sense of loss. Rituals change and people seek ways to soothe their pain. From a human resources frame, change disrupts interpersonal interactions and the informal structure of the organization. People may feel powerless or incompetent as they face needing to develop new skills, new relationships, and new ways to be involved in the organization.

Change becomes very personal when it impacts individual's career potential. Stress increases. To address individual career concerns organizations need to take a human relations viewpoint and examine the impact changes are having on individuals and the possible impact of future changes. Involving individuals in those discussions is crucial to developing a humane approach to downsizing and change.

The issue then is how to design a process that will result in the definition of the role of the technical services librarian in an era of change. In this paper changes in one technical services unit of

an ARL (Associate of Research Libraries) institution will be examined. An analysis of the process used to make changes will be presented as a model to other institutions exploring similar questions.

THE UNIVERSITY LIBRARIES, UNIVERSITY OF NEBRASKA-LINCOLN

Issues relating to the role of Technical Services librarians at the University of Nebraska-Lincoln (UNL) began to surface early in 1993. In part, these questions arose because of changes that occurred in the role of the Public Services librarians at UNL. Public Services librarians had conducted an analysis of their activities in 1991/92. As a result of the analysis, four Program Groups were formed to coordinate the activities of Public Services librarians. The groups serve as decision-making bodies within Public Services and make recommendations that affect the Libraries as a whole. These four groups are Electronic Resources Program Group (ERPG), Access Program Group (APG), Library Instruction Program Group (LIPG), and (a previously existing committee) Collection Development Committee (CDC). It was the perception of the Technical Services librarians that these program groups were discussing issues of primary importance to the future of the University Libraries. With the exception of Collection Development Committee, no program groups had Technical Services librarians as members.

Concurrently, the Library Administration announced that six to nine positions would be reallocated from Technical to Public Services in 1992/93. This announcement was not a surprise. Public service points were being stretched considerably as usage of the University Libraries' Innovative Interfaces, Inc. online integrated library system, called Innovative Research Information System or IRIS, increased. In just four years, circulation had increased 44.5 percent, reference questions were up 35.9 percent, and borrowing in Interlibrary Loan had increased by about 20 percent. Simultaneously, reduced buying power for materials due to inflation had decreased the number of

new items received in Technical Services. Having fewer new materials meant that Technical Services had been able to tackle long-standing backlogs and clean-up projects to fill the void; however, the Library Administration felt that this was rapidly becoming a luxury that the Libraries could no longer afford.

With the announcement of the staffing reallocations and the perception that many of the recommendations regarding the future of the University Libraries were coming out of Public Services, the Technical Services librarians began to feel that the value of their role was being glossed over. It seemed to the Technical Services librarians that they had skills with the potential to enrich the Libraries which had not yet been tapped.

In March 1993, the Technical Services librarians discussed their current roles, and what the future of professional catalogers might be. Among the roles identified were: serving as resource people for peers and support staff on questions relating to language, subject, theoretical aspects of cataloging, and for related analytical work; problem solving; writing documentation; training staff; performing original cataloging; serving on library committees; answering questions from other libraries (particularly in the state of Nebraska); participating in policy discussions; and providing quality control.

The librarians discussed the concept that in the future, all cataloging would be done from a few major centers. The group felt that in the foreseeable future, the odds of developing such centers are slim. It was felt that national standards are not standard enough to eliminate the need for local practices. For example, for titles that may be treated as either monographs or serials, the treatment may need to vary with the emphases of the collections. Access points or headings may vary by collection or user needs. Or, bibliographic records may not be available in a timely manner from a central source. An example of this might be government documents. GPO cataloging records are usually available on tape within six months

after pieces arrive, but for high use items this may not be acceptable.

While support staff know local practice and can verify if a heading (for example) is valid, they are not trained to interpret rules or to catch if a better heading should be used. The national rules are not hard and fast, but require judgement in knowing when to apply them. Professional catalogers understand how to apply the cataloging rules and are aware of trends in cataloging. They create and influence the development of databases on the online catalog, are involved in providing access to electronic databases, and understand how information is packaged. These skills were felt to be too important to be overlooked.

Following this discussion, the librarians agreed to develop a proposal for what role they wanted as Technical Services librarians at UNL, and to address where they saw the field going. Various points were considered in developing their position. Besides addressing some of the skills mentioned above, the Technical Services librarians felt that they needed career options and opportunities. Individually, they developed ideas of the major elements, tasks, or assignments they would like to see as part of their responsibilities. Not surprisingly, there was a great deal of variety in the assignments they identified. The continuum ranged from one person who want to spend 80% of her time cataloging to those who wanted other options. Possible activities or job components included everything from cataloging (the norm) to collection development, computer systems, distance learning, and public relations. In all twenty-eight general areas of interest were identified. The one area that all agreed upon was "involvement in decision-making."

It was agreed that the proposal should advance a number of models that could be available to librarians for advancing career options. These included internships (one year commitment, 20 hours per week); staff exchanges; and staff sharing (working up to 5 hours per week in another department) proposed either by the librarian or by departments.

Several actions were taken as a result of the discussions. First, Technical Services librarians participated in a time study to identify where their time was being spent and to consider what time might be available for other activities. They also discussed where decisions are made within the organization and who makes them.

With this background information, the Technical Services librarians felt prepared to make some recommendations to the University Libraries' Administration. A small task force of three librarians prepared a first draft of a report entitled "Technical Services Librarians Position Paper". The draft was distributed to all Technical Services librarians and was discussed. Minor changes were completed and the finished paper was sent to the Dean of Libraries.

Among roles envisioned is one with enhanced involvement in technological advancements on campus through creation of catalogs and databases. Another role is to explore providing specialized expertise to other institutions in the state or region. For example, UNL Technical Services librarians are already actively involved in presenting workshops on cataloging for NEBASE, Nebraska's OCLC affiliate network. There is a need for consulting services in the area of authority work, and for contract services in certain areas of strength (e.g. music cataloging, preservation planning, and grantwriting.)

The paper suggests too that Technical Services librarians with language and subject expertise might be good candidates for assisting Public Services in collection development and liaison activities. The position paper concludes "Technical Services librarians possess a range of aptitudes, interests, and experience that are vital to the success of the Libraries."

As the discussions developed over this period, the Associate Dean for Collections and Technical Services raised some of the issues in various meetings with the Library Administration. As a result, some changes occurred concurrently with the development of the position paper. One of the changes was that a librarian who does not have

management responsibilities was added to the Administrative Group--a management team consisting of the Dean of Libraries, the two associate deans, and one department chair--on a three month rotation.

The Dean of Libraries met with the Technical Services librarians in May 1994, and indicated his support for the ideas presented in the position paper. The support of the Library Administration helped to set the scene for several changes relating to the Technical Services librarians' roles. One change that has occurred is that Program Groups now have a member-at-large position. Technical Services librarians are encouraged to apply for these positions and decisions regarding membership on the Program Groups are made by the joint department chairs (Public and Technical Services.)

Another change is that Technical Services librarians are now involved in cataloging titles for the University's Gopher. Depending upon whether holdings are archived at UNL, the cataloging is in either MARC or non-MARC. This has enabled Technical Services staff to learn more about the Gopher and to make recommendations to Collection Development Committee concerning treatment of various databases on the system.

The University Libraries has had a management internship program for about six years. Partly in response to the Technical Services librarians' request for additional career opportunities, other internships are being considered. A Resource Sharing internship in Interlibrary Loan was developed and Technical Services librarians were encouraged to apply.

Having increased opportunities does not mean that librarians have always been able to take advantage of them. UNL currently is involved in several grant projects requiring a time commitment on the part of staff. Projects include cataloging a special collection of Emily Dickinson materials, the Nebraska Newspaper Project, and the Kellogg Rural Economic Development Archive contract with the Heartland Center. Priorities of the institution may take precedence over the desires of individuals.

ANALYSIS OF THE PROCESS

Bolman and Deal provide a framework for analyzing the context and events surrounding the discussions of the Technical Services librarians. From a structural viewpoint, the librarians reviewed roles, policies and procedures in light of the changes in the field. They identified key areas of expertise and showed how those skills are still valid. They confirmed the role of the technical services librarian within the context of the library situation. No major changes in structure were proposed by the group. This is not surprising since the outcome of the discussions tended to confirm established practice rather than change it.

Politically the process involved a variety of negotiating opportunities. While the librarians were discussing their place in the libraries, the Associate Dean was working with Public Services to develop ways to expand the involvement of the Technical Services librarians in decision making options. By coincidence a vacancy came open on one of the Program Groups giving the Associate Dean an opening for suggesting that the groups evaluate their membership. Current members of the group who had now served for two years on the Program Groups were willing to consider changes. The groups were willing to add a general member-at-large slot that would be open to any librarian. This way, both Public and Technical Services librarians could volunteer for membership on the committees.

At the same time as the Associate Dean was working with Public Services to find ways to include the Technical Services librarians, the administration was looking at ways to expand management training opportunities for the librarians. The Dean decided to add a faculty member to the administrative group on a three month rotating basis so that non-management librarians would have an opportunities to learn how this administrative group functions. The Dean chose a Technical Services librarian as the first appointee, knowing that these librarians had expressed an interest in learning more about management. Had the Technical Services librarians not raise the issue ini-

tially, it is quite likely that the Dean would have chosen a Public Services librarian for this new opportunity since the Public Services librarians were seen as more interested in the activities of the organization.

By looking for appropriate arenas in which to discuss the issues, and taking advantage of changes as they occurred rather than waiting for a final report before beginning to make changes, the librarians and the administration were able to implement changes during the planning process.

From a human resources viewpoint, the process was very successful. The librarians achieved their major objectives with a minimum amount of stress. They were able to express their views, discuss different approaches, and redefine how they could participate in the institution. They no longer felt powerless, unable to affect their own futures. They had established a measure of control over their own careers and created opportunities for all the librarians to participate more fully in the library decision making processes.

Symbolically the librarians found they could influence library management. They confronted the myth that all decisions were made in Public Services and created avenues of their own for influencing the organization. They presented their views to the Dean in a logical manner and were able to influence how the Dean of Libraries viewed their activities. By confronting organizational myths and perceptions they found that they had as much influence as they wanted in the organization.

CONCLUSIONS

Change in organizations can be very stressful. Bolman and Deal point out that managers need to think multidimensionally if they are to be cognizant of the many elements that are part of the change process. Their framework helps provide managers with a guide for how to look at complex operations. For the Technical Services librarians, a multi-part approach to their question proved to be very successful. Rather than limiting their actions to one process, discussion of the issues and

creation of a set of recommendations to the administration, the librarians were able to implement changes even as they planned the types of changes they wanted to see. By seeing that they had personal control of their careers they were able to create opportunities so that they could gain the skills they needed while increasing their participation in the organization. They took advantage of opportunities as they arose, working incrementally to impact the organization while fulfilling their own needs.

This framework can be helpful to other institutions in planning and evaluating change. By looking at the process from a variety of perspectives, managers are more likely to recognize multiple opportunities for advancing an agenda while keeping watch for problems and concerns that may arise during the change process. Often managers concentrate on one or two aspects of an organization, missing subtle parts of the process.

By thinking more broadly about the process, options for change, and the meaning of the process, managers are more likely to succeed in their activities. At UNL by looking at the broader question of career development for Technical Services librarians, and not stopping with the narrower question of how Technical Services librarians could be involved in the Public Services decision making activities, the Librarians were able to create a wider role for themselves in the library while designing strategies to advance their own careers.

NOTES

1. Lizbeth Bishoff, "Who Says We Don't Need Catalogers?," *American Libraries*, September, 1987, 694-96.
2. Patricia A. Eskoz, "Catalog Librarians and Public Services -A Changing Role," *Library Resources and Technical Services* 35(1989):76-86.
3. Lee Bolman and Terrence Deal, *Reframing Organizations* (San Francisco: Jossey-Bass, 1991).