TELLING THE TECHNICAL SERVICES STORY

COMMUNICATING VALUE

EDITED BY

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Introduction

The work of technical services librarians and staff has long since moved beyond an exclusive focus on the daily acquisition, cataloging, and processing of materials. In this era of increased cross-departmental collaboration, evolving technology, shrinking budgets, and the misconception by some that researchers only need access to a Google search box, the staff in technical services departments must be able to communicate the role their work plays in supporting the mission of both their library and their larger institution. This book illustrates effective strategies that technical services departments have used to facilitate such communication.

The book’s case studies are divided into three parts focusing on the intended audience, moving from internal communication to interdepartmental communication, and ending with communication external to the library. The chapters in this book were written by staff in research institutions across the United States, and though this may limit the book’s scope in some ways, we feel that these studies can nevertheless provide a road map for an array of libraries.

The book’s first part, “Communication within the Department,” illustrates ways to improve communications within a technical services department. Autumn Faulkner and Emily Sanford start off by describing their department’s complete overhaul of its documentation, thereby both improving the department’s work product and fostering equity. In the next chapter, Patrick Flanigan shows the ways in which Basecamp can be used to support healthy
communication throughout a department. Following that, Gwen Gregory explains the myriad benefits that can come from regular technical services retreats. In the final chapter of this part, Melissa Moll and Shelby Strommer describe how they implemented multidirectional communication strategies to coordinate a large-scale collections project.

The chapters in part II, “Communication across Library Departments,” depict the ways in which collaboration has been fostered with library colleagues outside of technical services. This part begins with a chapter by Kaylan Ellis, Jennifer Donley, and Christopher Deems, who created a community of practice between the technical services and systems departments in their libraries. In the next chapter, Xiying Mi, Bonita Pollock, and Brian Falato show how they established a series of cataloging classes for the public services department, thereby enhancing the cataloging knowledge of public-facing staff to better facilitate their work while simultaneously demonstrating the value of cataloging. In their chapter, Erin Block and Kimberly Lawler demonstrate how they used Trello to streamline the communication related to e-resource purchasing and activation across departments. Meghan Burke took a different approach to e-resource management at her library and established an e-resource ticketing system using Google tools to improve error notification and resolution. Jennifer Mezick and Elyssa M. Gould conclude part II with a description of how they improved their collection development processes by strengthening communication between technical services and subject librarians.

In the book’s third and final part, “Communication outside the Library,” the authors describe their experiences reaching beyond the library’s walls to better promote and further the work of their institutions. Anna Seiffert begins by explaining how her library improved the way it communicates information about its budget to its parent institution’s administration and faculty. In the next chapter, Hilary Hargis and Jenny Novacescu provide an overview of marketing concepts and show how technical services departments can aid directly in the marketing work of a library. In their chapter, Heather Jeffcoat, Marlee Givens, Sofia Slutskaya, and Karen E. Viars show how their library addressed the growing shift to an electronic resource-focused collection and how that move was communicated to the campus community. Maggie Dull’s department approached campus outreach in a different way, launching a service to provide metadata support for various stakeholder projects outside the library. In the last chapter, Jamie Hazlitt and Glenn Johnson-Grau describe a multifaceted weeding project that incorporated extensive and successful outreach and collaboration with faculty.

Facilitating better communication within our libraries is something we all strive to embrace. We hope that the following chapters provide useful information for all types of libraries and show the many ways that technical services departments can and do successfully tell their stories every day.
PART I

COMMUNICATION WITHIN THE DEPARTMENT
When considering good communication in the workplace, documentation is perhaps not the first thought that springs to mind—often it is an afterthought and develops ad hoc when the occasion dictates, and is jotted down quickly and watched over by accidental custodians. The importance of documentation, however, can be seen in how it sprouts up even when there is no particular plan for curating it. It pops up higgledy-piggledy in personal caches—on sticky notes, on printouts, in Google Docs, in saved e-mails, or in computer files. It exists in (sometimes) organized forms in unit wikis, intranets, and three-ring binders. Indeed, documentation is a natural by-product of the complex and precise work of technical services.

It is not a controversial statement to say that good documentation is useful. (In this context, *documentation* is understood as written instructions or information to guide workplace processes, and good documentation may be taken to mean documentation that is cohesive, formalized, and regularly maintained.) And yet this crucial form of communication often gets short shrift. There are many valid reasons why documentation slips to the bottom of the to-do list. It can be complicated and messy. Like a car or a toddler, it requires frequent maintenance and monitoring. It is not flashy and requires...
Part I: Communication within the Department

time and energy that can already be in short supply in a busy workplace. However, we contend that intentional strategies around documentation support efficiency, workplace equity, and institutional memory.

THE BENEFITS OF DOCUMENTATION

The project discussed in this chapter was born out of a perceived need for a strategy to better care for our Technical Services Division’s documentation at Michigan State University (MSU) Libraries. We wanted to alleviate pain points for those creating content and those consuming it by providing an organized and extensible framework and an easy-to-use interface. We applied research, project planning, and various user experience (UX) methods to accomplish our goal. In writing about our processes, we hope to provide something useful and applicable from our project that libraries can adapt for their own use.

When conducting a mental review of your unit’s documentation, you should decide what level of effort is worthwhile and consider the two primary outcomes of good documentation: (1) quality and (2) equity.

Why We Wanted to Do It

**Documentation Supports High-Quality Work**

There is a direct line from good documentation to quality work. Traditional technical services (TS) work is detailed and highly structured by its very nature. The work must support multiple workflows that acquire, describe, process, track, and maintain a diverse set of materials through their library life cycle. In the last few decades, libraries have expanded their missions and incorporated more nontraditional items into their collections to support the research and information needs of their communities. TS rules and systems built to encapsulate the standard book have adapted to ingest nontraditional items, like online streaming media, cake pans, and soldering kits (to name a few). Now more than ever, our workflows cross traditional TS team lines. These workflows are complicated and often involve multiple individuals, if not multiple teams.

In this environment, shared documentation is vital to high-quality, accurate work. If reliable and easily referenced, it can reduce cognitive load, mistakes, redundancies, and questions. It can also ensure that library materials are treated consistently and follow more efficient paths to availability. Predictable data equals good discovery—as much for acquisitions staff creating fund code lists as for the front-end library user searching the catalog. Finally, documentation functions as an archive. TS work does not exist in a vacuum. The database represents an accumulation of past decisions and projects. Data created today must live and thrive in that existing ecosystem. Having
documentation helps mitigate the loss of institutional memory that follows retirements and system migrations. It further provides the bedrock on which we may build future library technical services environments.

**Documentation Fosters Workplace Equity**

Just like other forms of workplace communication, documentation is crucial to staff empowerment. Through the distribution of shared knowledge and expertise, documentation ensures equal access to critical information, mitigates incidental or intentional gatekeeping, creates transparency in local decision-making and cross-divisional communication, and promotes the responsible stewardship of staff time and energy.

Transparency, accessibility, shared expertise, stewardship—any library strategic plan will include some of these as goals, and it is easy to connect them to workplace well-being. Good documentation means that newly trained Staff Member A knows to bring certain types of materials to a certain shelf for processing instead of bringing it to Staff Member B by mistake. While, of course, this should be no big deal in a collegial environment, we should not discount the everyday power dynamics of workplace interactions. What if Staff Member B is not comfortable correcting another person’s mistakes and feels pressured instead to take on unassigned work? Inadequate documentation can potentially place staff in positions of insecurity, anxiety, or indecision.

Good documentation, by contrast, builds confidence and trust. Staff members exercise their own competencies and agency by searching for and following procedures; they spend less time navigating “who,” “what,” and “how” questions and have more capacity for questions of effectiveness. When an entire workflow is mapped out and visible, all those involved have access to the big picture and can be equal participants in workflow design.

**A Note about Care**

We have discussed quality and equity as two important outcomes of good documentation. To view both of these from a more philosophical perspective, think of good documentation as a way of showing care—care for our end-users and care for our staff. Consider the four elements of the feminist care ethic as outlined by Joan Tronto and Bernice Fischer and paraphrased for this context:

- **Attentiveness:** awareness of and scanning for need
- **Responsibility:** willingness to address need
- **Competence:** skillful and appropriate methods of addressing that need
- **Responsiveness:** consideration of users’ positions and their perceptions of provided care
Effective documentation addresses each of these elements. We are attentive to the needs of our users, whose ability to access library resources quickly and intuitively depends on smooth workflows in TS. We are attentive to the needs of our staff by acknowledging the cognitive load of TS work and recognizing that it is unreasonable to expect them to commit thousands of details to memory. We accept the responsibility of providing reliable and accessible information to end-users and staff, and we commit to doing this competently and iteratively, in response to changing systems, materials, and use cases.

The last two elements are crucial. Any equity and empowerment that documentation achieves, and any return on investment of time and effort, are predicated on staff finding that documentation to be truly usable.

**WHY WE NEEDED TO DO IT**

The MSU Libraries’ Technical Services Division comprises seven subunits: Acquisitions, Catalog Maintenance, Cataloging & Metadata Services, Copy Cataloging, Metadata Management (authorities work), Catalog Services (system management of the integrated library system, or ILS), and Electronic Resources. The division has a complement of approximately forty full-time employees who work together to acquire, catalog, process, and maintain library resources. With so many teams and staff members, not to mention student workers, we rely heavily on communication to coordinate our many workflows and processes. Our TS documentation has historically served as a central place for procedures, policies, and statistics-gathering. The division’s documentation had been through several iterations over the decades as technology evolved, bouncing from binders to website to wiki to Drupal. The documentation had been edited or amended by various editors as needed and as time allowed. This unintentionally gave rise to a disjointed organization of topics, duplication, and conflicting or outdated information. The whole thing had ballooned to 300+ pages, which were punctuated with the names of former systems and staff members. All these factors meant that staff spent considerable time slogging through bloated and sometimes unreliable information. Content creators had a basic template to work with, but were essentially starting from scratch each time they needed to write a new procedure. Any changes to the menu options or templates required Web Services’ assistance and permission.

Before we launched our project, the libraries’ public-facing Drupal website was the repository for TS documentation. Its placement there was intentional to align with the university’s land-grant philosophy of openly sharing information with the wider community for their use and benefit (a philosophy we replicated in our current site by making it publicly accessible). But the location...
on the libraries’ main website also triggered logistical issues. The search function searched the whole website, making it difficult to narrow a search to strictly TS documentation web pages. Searching “microfilm” in this interface would return relevant LibGuides for patrons on using microfilm, alongside TS internal documentation detailing local procedures for assigning call numbers to microfilm. This was as frustrating for TS staff as it was potentially confusing for users. Any changes to the documentation site’s web pages, no matter how small, required Web Services’ assistance to go live—typically at least a 24-hour turnaround. While our Web Services colleagues were responsive and helpful, these added steps were ultimately unsustainable for us considering the numerous edits our many pages warranted, and it felt like an underutilization of their skills and time.

ANALYSIS AND DEVELOPMENT OF THE PROJECT PLAN

Project Plan and Goals

We had long discussed a project to evaluate the division’s documentation. The project fell into our niche areas of interest. As catalogers, we rely on, recognize, and value good, organized documentation. Faulkner, as manager of the Copy Cataloging Team, often writes procedures and onboards new staff who rely heavily on documentation. Sanford, who spends part of her time within the libraries’ User Experience Unit (UX), has long had an interest in the intersection between UX and technical services. In late 2017 our schedules aligned, and we got a green light to proceed with the project from our administrators. We understood that this would be a time-intensive undertaking with many moving parts, as well as a project we were pursuing in addition to our regular work. To that end, we developed a project plan to guide us and keep us on track. Our goals for the project were informed by our understanding of the documentation’s pain points, which we have outlined in the above paragraphs. Our delineated project goals included:

▪ Improved information architecture for the overall site
▪ Increased findability and readability of procedures for users
▪ A simplified process to create/write/edit content (interface, guidelines, templates, built-in infrastructure, and accessibility)
▪ Future-proofing (accounting for future growth and developing a mechanism for routine reviews of content)
▪ Identifying gaps in the documentation of current workflows

To meet these goals, we developed a project checklist, shown in figure 1.1, with a multiphase approach.
Part I: Communication within the Department

Initial Analysis and Assessment

Using Google Forms, Sanford built a survey to gauge the staff’s confidence in and usage of the existing documentation site. We had a good response rate of approximately 45 percent. Both closed- and open-ended questions were utilized to gather the data. The results confirmed our own observations—the site was unsearchable, hard to navigate, and out of date. The survey did not reveal any new insights, but provided confirmation that we were moving in the right direction. If you are working with a medium to large staff (anonymity is important; too small a staff and anonymity is hard to maintain), a survey might be a good first step to identify problem areas and hidden blind spots. Google Forms is free and relatively easy to use. All surveys are not created equal, and investing time into research on good survey development is a key first step. It is also helpful to have a colleague complete a run-through of the survey to provide feedback and catch any assumptions or mistakes. Reading up on informed consent in survey deployment is also a must.

Having ascertained what our users thought, we turned to external examples of technical services documentation for ideas. Why reinvent the wheel? Comparative analysis, another user experience tool, is a process that identifies tools and strategies that already exist and could be adapted for use. Sanford completed a comparative analysis of the TS documentation sites of like-sized university libraries, especially our peers in the Big Ten Academic Alliance. That analysis found, among other things, a new tool we had not previously encountered: Confluence, a part of Atlassian’s suite of products. Several university libraries and technical service departments were using it for their intranet and/or documentation sites.
Accessible Design and Architecture

With identified user needs and comparative analysis in hand, we began investigating best practices around accessible design and information architecture. An entire chapter could be written about our findings, so we encourage you to consult our project archive (https://tinyurl.com/MSULTSarchive) if you wish to explore further, but here are the key takeaways:

The page and site design should aim to reduce cognitive load.

- Written technical procedures involve a significant demand on the reader’s “internal storage.”
- The style and formatting of presented text have a direct effect on reader comprehension.
- Too many choices or too much information at once increases cognitive load and hinders decision-making. Navigation choices should be lean at the top.

The page and site design should ensure accessibility.

- An online procedures site is better than paper documents or files stored on individual machines.
- Standardized structural elements should be used both site-wide and in individual pages to assist screen-reading software.
- We should comply with the Web Content Accessibility Guidelines 2.0 (WCAG) (www.w3.org/TR/WCAG20/) recommendations and perform screen-reader testing.

To accomplish both of these mandates, we drew upon the Gestalt theory of design, the principles of plain language, and the principles of information architecture. Gestalt theory orients itself to the tendency of the human brain to sort and synthesize pieces of information into an easily comprehensible whole. To best accommodate this instinctive behavior, the presentation of information should adhere to the principles illustrated in figure 1.2. The plain language approach emphasizes logic, context, conciseness, and clean design as aids to comprehension. The principles of information architecture encourage a clear demarcation of different types of content, meaningful choices, layered content, hierarchical presentation, and intuitive categorization and classification.

Using these principles and our known user needs, Faulkner generated a list of optimal features for our new documentation site:

- General
  » Discoverable on the Web
  » Intuitive editing interface
  » Immediate publishing
Part I: Communication within the Department

IMPLEMENTATION

Why We Chose Confluence

When it came to the choice of a new platform to host the documentation site, we considered all the options known to us and identified in our comparative analysis. It came down to three contenders for a new platform: (1) a wiki, (2) an internal Drupal site developed for us by Web Services, and (3) Confluence. Using our needs list, we assessed each content management system. Confluence is a “team collaboration software” that has document storage functionality and wiki-like features. When compared with our list of desired
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