

HOW FOUR BECOME ONE, OR WHEN TWELVE BECOMES SIX: AMALGAMATING TECHNICAL SERVICES

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Abstract

In 2006, Southbank Institute of Technology libraries (previously known as Southbank Institute of TAFE libraries) really started focusing on its amalgamated library service to be provided by the end of 2008. As part of this process, the libraries were looking to amalgamate four Technical Services teams across four campus libraries into one Technical Services team that would provide the acquisition, cataloguing and end-processing of resources to the three existing campus libraries from mid 2007.

Objectives

This paper focuses on the Technical Services team and looks at how they worked towards this amalgamation, in the midst of implementing a new library information management system in early 2007, changing to a new MARC cataloguing system and also moving to the new Southbank Central Library in mid 2007. It will look at how the team worked in four separate locations leading up to mid 2007 and what challenges we faced to bring the team together to provide an efficient technical services unit to the libraries.

Introduction

Southbank Institute of Technology, as it was renamed from July 2006, has been designated as a lead institute for the provision of technological and high level skills, training and education in Queensland. This was as a result of changes to the TAFE Queensland system which started with the launch of the Queensland Skills Plan in March 2006. The Queensland Skills Plan was developed after consultation between Queensland Government, industry associations, employers, and training providers to outline a policy framework to meet the current and future needs of Queensland's vocational and education training system.

Southbank Libraries, which are part of the Information & Flexible Learning Unit, were also looking to future trends and were starting to explore other libraries to look at how we could assist the Institute to meet these new challenges by providing an improved library service. With this in mind, library managers started visiting various libraries with a view to looking and learning from their workflows, the layout of library and learning areas, what worked and what didn't work and how we could improve our services to provide a better library environment for Southbank Institute of Technology clients.

Many libraries were visited between 2005 and 2006 to gain ideas with the focus mainly on university libraries. Libraries which were visited included the Ipswich and St Lucia campuses of the University of Queensland, the University of the Sunshine Coast, Queensland University of Technology and the Australian Catholic University, Banyo campus.

In May 2006, 2 library technicians (TO2 level) from the Institute were successful in progressing to senior library technician (TO3 level). There were now three TO3 senior library technicians employed in the Institute libraries.

With the creation of these two new roles - a Coordinator (Technical Services) and a Coordinator (Lending Services) - position descriptions, essential duties and responsibilities were created for each role. These position descriptions were formulated by the Institute Librarian, Senior Librarians and the two TO3s.

The Coordinator (Technical Services) reports to the Manager, Library Resources and is responsible for the supervision and the management of the serials, cataloguing, acquisitions and processing support staff to accomplish the purchasing, cataloguing, processing and distribution of all library materials to the libraries.

The Co-ordinator (Lending Services) reports to the Manager, Lending Services and is responsible for supervising the efficient operation of the Customer Services/Circulation Desk, which provides high quality services including circulation, inter-campus loans, interlibrary loans and electronic equipment loans.

The other TO3 Senior Library Technician, which is a part time role of 2 days per week, is responsible for co-ordinating the Customer Services Desk roster, co-ordinating the collection shelving and maintenance, and undertaking project work as required to support the efficient operation of the Lending and Technical Services teams. This person also reports to the Manager, Lending Services.

These three senior library technician roles also incorporated:

- working with the systems, technical services, lending and library technician teams on new Library Information Management Systems (LIMS)
- updating procedures, processes and workflows to maintain quality standards and output
- assisting with transition into the new library; and
- organising staff training

Technical Services Prior to Amalgamation

Prior to July 2007, when the Cotah and Southbank campus libraries closed and were amalgamated into the new Southbank Central Library, Southbank Institute of Technology libraries had operated from four separate campus locations – Kangaroo Point, Morningside, Cotah and Southbank campuses.

Each campus library managed its own technical services functions including acquisitions, cataloguing and serials, with effectively twelve staff (three at each campus) responsible for the campus ordering of library resources to the end processing of library resources to shelf ready status.

Prior to 2005, the Southbank Institute of TAFE libraries, as they were then known, were made up of tasks groups including Lending Services, Technical Services and the Library Technician Peer Group. The Lending and Technical Services groups met monthly, with the Peer Group meeting once or twice a year (usually during semester downtime) for less disruption to workflows and circulation desks.

In July 2005, as an outcome of the Information and Flexible Learning Unit's planning day, the Library Technician Operational Group (LTOG) was created which was a merger of the Technical Services, Lending Services and Library Technician Peer Groups. The aim was to create a forum for library technicians to be able to communicate and discuss information relating to core library tasks and operational issues, including:

- ❖ lending and technical services
- ❖ professional development
- ❖ marketing; and
- ❖ projects to support the strategic direction of the library and the Institute.

Information and outcomes from these meetings were then disseminated to the library managers and other library staff. This amalgamated group met monthly for approximately two hours, with the librarians managing the circulation desk functions during the meeting. By amalgamating these groups we made more efficient use of our time, as we no longer required multiple meetings with the librarians covering the circulation desk for separate meetings on different days each month and a longer group meeting a couple of times throughout the year.

During 2005 and 2006, library staff regularly met with the Institute Librarian and senior librarians to provide input into the layout of the technical services area for the new library. This group was made up of members from the library technician group who contributed their knowledge and experiences of working in a number of larger libraries to assist with providing an efficient technical services environment in the new library. From these meetings, the group produced a list of specifications they felt would be beneficial in the new library and would assist in providing an efficient environment and workflow for staff, as well as an effective service for our clients. These specifications included:

- ❖ furniture, desk size and location
- ❖ shelving requirements
- ❖ layout/space needed
- ❖ desk set up for technical services staff
- ❖ height of unpacking and end processing benches.

This information was used to assist the interior designers of the new library with the room design, layout and furniture for the technical services area.

As mentioned previously, prior to the amalgamation of the libraries, there were primarily twelve technical services staff who were each responsible for a different role (acquisitions, serials or cataloguing). These roles were in addition to the other daily duties they were responsible for including circulation desk duties, shelving, processing interlibrary loans and inter campus requests.

With the serials subscription agency changing from EBSCO to DA Direct and serials centralising from 2006 as part of this change, the serials technicians met in May 2006 to discuss subscriptions and which ones would be cancelled with the combined library environment. Cotah and Southbank's subscriptions were first to be assessed, to identify duplicates to be cancelled where appropriate, with Kangaroo Point and Morningside's subscriptions also being considered leading up to the full library amalgamation in 2008. With courses moving from both Kangaroo Point campus and Morningside campus to the Southbank Central campus for commencement from second semester 2007, unnecessary duplication was identified and subscriptions to serials were modified as a result.

The library technician managing the serials process was taken off-line for a couple of months early in 2007 to learn the serials module of the new LIMS - Horizon. During this time, copy records and prediction lists for approximately 300 titles which the four libraries subscribed to started to be set up on Horizon as well as the creation of work instructions to document these procedures. With the centralisation of serials, all serials received from DA Direct were sent to the serials technician for the creation of serials records and their receipt before forwarding to their home campus library.

With the eventual centralisation of the four campus libraries into one, the lending policy for serials was also reviewed with a view to providing a consistent service now and in the amalgamated library in 2008. With only Cotah campus library barcoding and lending music and floristry serials to students enrolled in the Contemporary Music and Floristry courses, it was decided to cease the lending of all serials across the libraries. This would provide a consistent service to students and teachers, with adequate photocopying facilities available in the library for clients to photocopy articles from these serials as an alternative to lending.

In November 2006, based on feedback each library technician provided through their Team Initiative Planning (TIP) document and subsequent interview with their library manager, the Lending and Technical Services teams were decided and communicated to the LTOG group. As part of the TIP process, each library technician had been asked to identify which team they had a preference to work in. After discussions between the Institute Librarian, senior librarians and the TO3 technicians, staff were allocated to teams with staff advised at the LTOG meeting later that month. These were the teams staff would be working in when the library started amalgamation in July 2007 and would also be the teams we would work in for the next eighteen months, until the four libraries merged into one library by the end of 2008. The LTOG meetings continued with the whole group meeting, as well as a separate meeting for the Lending Services team and Technical Services team at each meeting to discuss specific issues relating to how that team would operate in the new library.

When the Technical Services team met after the November 2006 LTOG meeting, we agreed that the goal of the technical services area was to provide a more complete service to our clients, with complete and accurate information they wanted. We also wanted to set a benchmark for how we would operate in the amalgamated team.

With this in mind, we suggested that all technical services staff should be trained in acquisitions, serials and cataloguing, with one area being in-depth and the other two areas providing a basic knowledge. After receiving training each person would then be required to regularly undertake duties in each of the above three areas to keep up-to-date with procedures and how to perform them. This would provide for a multi-skilled team for when staff were on leave or workloads peaked in different areas and multiple staff were required to undertake a role while their main role was relatively quiet, e.g. acquisitions/ordering completed until the next budget was available and a back load of cataloguing existed as was the case in July 2007 when the first amalgamation occurred.

A matrix of Technical Services Team decision making suggestions was created by the Institute Librarian and agreed to by the Manager, Library Resources and the Technical Services team.

| Given: 0% | Consult: 25:75 <i>Ultimately Manager's decision 75% but 25% input from Library Technician team</i> | Negotiate: 50%:50% <i>To achieve consensus, 50% Managers & 50% Library Technician team</i> | Decide/ self manage 100% <i>Library Technician team consensus through weekly meetings</i> | TO3 Responsibility |
|---------------------|--|--|---|------------------------------------|
| Budget | Performance management | Professional development | Procedures | Statistics |
| Staff levels | Electronic resource management | Special Projects | Workflows | Quality standards |
| HR decisions | | Equipment | Vendor liaison | Professional Development |
| Time sheet sign-off | | | Problem-solving | Roster |
| Leave | | | | Initiating new projects/procedures |
| | | | | Regular reports to manager |
| | | | | Supervision of trainee |

The Institute Librarian confirmed that in the new library:

- ❖ All technical services staff would be undertaking shelving and Customer Services/Circulation Desk shifts (these will be determined by the Lending Services Co-ordinator)
- ❖ Staff required to work across campuses (this included librarians, as well as library technicians) would work a full day at Morningside or Kangaroo Point
- ❖ The Technical Services team may ask for assistance from Lending Services staff if demands required extra staff to assist in Technical Services due to increased workloads

In early 2007, I was taken off-line for about four weeks to work on “in house” cataloguing procedures, incorporating the change from USMARC to MARC21 format and to assist in the creation of bibliographic workforms in the new library management system for different bibliographic types. In all, twelve workforms were created to assist the cataloguers with a standard to follow when cataloguing different bibliographic types of resources for the collection.

With the change to MARC21 and changes to our cataloguing procedures, we no longer needed to remove tags, fields and punctuation which were part of downloaded records. This was something we had undertaken with our previous cataloguing procedures and C2 system requirements. Other changes incorporated the change of a local call number field for our bibliographic records which had been a 995 field in C2 and we were now moving to the MARC21 field of 050 Library of Congress (LC) Call Number in Horizon. This improved our work processes with less time spent on editing out data from the bibliographic records and more efficient use of time adding information which would assist our clients to find resources including contents, summaries, etc.

In June 2007, the Lending and Technical Services coordinators met with the liaison librarian group to discuss their issues about how technical services and lending services would work in the new library. This was an opportunity for the liaison librarians to express their concerns on how both Lending and Technical Services would be working in the new centralised environment, especially considering that we were going from four single level libraries to a library which encompassed four floors. With four different campuses with their own separate technical services areas, and sometimes different campus specific procedures, there was concern as to what procedures would be followed in the new environment. Questions asked included:

- ❖ How would librarians know when new resources were received in Technical Services?
- ❖ How would librarians have input into the bibliographic record content? (i.e. recommended keywords, subject headings and call number areas)
- ❖ How would newly processed resources be sent to Morningside and Kangaroo Point campuses while?

This discussion and feedback was incorporated into procedures for the Technical Services team and communicated to the team. After meeting with the librarians, the coordinators then met with the Manager, Lending Services and the Manager, Library Resources to advise them of the teams working together to formulate how things would work in the new library environment.

As well as setting up teams and discussing procedures, there was also a lot of system data to review and clean up with the change to a new LIMS in 2007. Horizon would become our second LIMS since 1999 (prior to C2 we had URICA). Storage in the new library and how we could most efficiently store DVDs and CD-ROMs, not only for client access, but securely was another issue. With the amalgamation of the collections we wanted to start putting into place as soon as possible a consistent means of storage across all campus libraries to assist a streamlined process when the amalgamation of the collections occurred.

Most DVDs were stored behind the circulation desks at each campus and with the collection of DVDs increasing, we realised that we were going to need more space than what was currently available at the circulation desks to store them and the storage we would also have at the circulation desk in the new library. We also wanted better access for our clients to these resources and housing them behind the circulation desks was not effective for access or loan statistics.

After investigating various forms of storage for DVDs, we choose the Red Tag system where DVDs would be housed at their LC call number area in the General Collection. They were stored in a DVD case, with a security device inserted to prevent the case from being opened without being brought to the circulation desk to unlock before issuing. We also found this storage sat well on our existing shelves and we did not need to purchase special shelving or racks to store them. Cataloguing and end processing procedures were modified to incorporate these changes.

In late 2005/early 2006 we also started investigating how we could store our increasing collection of CD-ROMs now and into the future. We knew that as with the DVDs, storage at the circulation desks was becoming very crowded. It seemed that a high percentage of resources now also came with an accompanying CD-ROM which added to our storage problems.

It was decided that accompanying CD-ROMs would be placed in the back of the resource and in line with these changes, cataloguing procedures and end processing procedures were modified to incorporate these changes. In May 2006, a systems report of bibliographic resources with their accompanying CD-ROMs was generated from the library system and distributed to campus library technicians to action. All campuses started processing their CD-ROMs into the back of the resource and all existing holdings were placed in the back of the resources. Duplicate barcodes were generated for existing CD-ROMs to be placed on the pocket in the back of the resource where the CD-ROM would be stored. The only exception to these procedures was CD-ROMs that accompanied serials and electronic resources which would continue to be stored behind the circulation desks.

With the amalgamation of four collections into one collection and multiple copies of many titles held at different campus libraries, there was a lot of system maintenance to consider with the amalgamation. With different courses based at different campuses, housing of collections had been tailored to particular client groups at that campus. Examples of these differences in call numbers for the same bibliographic records were evident at Southbank campus where the International students and English as a Second Language (ESL) students highly used the CT biography LC call number area to source biographical information for assignments and therefore biographical resources were housed here instead of at their respective LC subject specific call number area as was the case at the other 3 campuses. At Kangaroo Point Library, a specific in-house call number and cutter system had been used to house all the Aboriginal Australian resources together at the DU125 call number area, with the other 3 campus libraries housing their same collection at the LC subject specific call number area. When some of the collections moved over from Kangaroo Point Library, they were to be housed in their LC subject specific call number.

To identify duplicate call numbers in bibliographic records system reports were produced with staff (librarians and the Technical Services team) checking to ascertain if resources identified would move to the same call number at Southbank Central Library. If one call number was to be used, then the bibliographic resources, item records and the spine labels on the resources were updated.

New Library Information Management System

Parts of Technical Services were centralised when the new LIMS was implemented in January 2007 and before the amalgamation of Cotah and Southbank libraries in July 2007. Acquisitions and serials were centralised prior to the move to the new library as these modules of the new LIMS worked better in a centralised environment. Following on from the training received in December 2006/January 2007, the two acquisitions library technicians started work on finalising data from the old system (C2) and producing new work procedures and entering new data onto the new system (Horizon). One technician, as the co-ordinator, was mainly responsible for setting up acquisitions budgets and funds, setting up and creating procedures and entering data onto the new system. By February 2007, all outstanding orders and budget balances had been transferred across to Horizon and a budget balance report produced to identify current fund balances.

Staff had undertaken Horizon training during December 2006 and January 2007, with data migration including bibliographic records and borrower records (not including items on loan) being migrated from C2 to Horizon in January 2007. When the libraries re-opened in 2007 we ran the old and new systems simultaneously until all items that were on loan to borrowers were returned off the old library system.

New Library – Southbank

From July 2007, two of the campus libraries, Cotah and Southbank were relocated to the new Southbank Central Library. At the Morningside and Kangaroo Point libraries, the librarians had identified which resources would be relocated to the new library, based on which courses were moving across for commencement in the new Southbank Central precinct from July 2007.

After identifying these resources and tagging them with coloured stickers, around 2000 items would be relocated from Kangaroo Point and approximately 3300 items would be relocated from Morningside. These items were scanned into temporary location codes in Horizon and then batch changed to Southbank campus. This included approximately 27% of Kangaroo Point's collection and 29% of Morningside's collection. Resources included were from the General Collection, Serials, 2 Hour Loans, Reference, Children's Picture Books, Fiction and the Trainee Collection.

Approximately 40,000 library resources were relocated from Southbank, Cotah, Kangaroo Point and Morningside to the Southbank Central Library, with resources shelved across the four levels of the library.

At Southbank Central Library the collections would be housed on:

- ❖ Level 1: Reserve Book Room and Archives
- ❖ Level 2: Reference; Language and Literacy; and Serials
- ❖ Level 3: General Collection (A – N)
- ❖ Level 4: General Collection (O – Z)

The four libraries were closed for the three weeks preceding the library opening on Monday 16th July. During this time, the resources were packed and sent to the new library, where a team of very hard working library staff were integrating the collections and preparing the library and their workspaces for the opening.

New Technical Services Team

The Technical Services team as at 16 July 2007:

- ❖ Co-ordinator Technical Services/cataloguer (TO3)
- ❖ 2 x Acquisitions Technician (TO2),
- ❖ 1 x Serials Technician (TO2)
- ❖ 2 x Cataloguers (TO2)

Reporting to the Manager, Library Resources (PO3)

In addition to the 6 technical services staff, there is also a library trainee (TO1) who is undertaking a Certificate III in Library Studies and works between the Lending Services and Technical Services teams. Her main role in technical services is end processing to shelf ready status, undertaking repairs to damaged resources, distributing newly processed resources to their campus library or new resources display shelves and processing borrower reservations for newly processed resources.

There is also a multi-media library technician who works between the Lending Services and Technical Services teams, with the majority of her role recording off-air television broadcasts for teaching staff and classes.

The Technical Services team is rostered on the Customer Services desk for approximately 10-12 hours per week, which is roughly 2-3 desk shifts per person each week. Each Technical Services team member will have at least one day per week where they have no customer services shifts that day. At present, one of the acquisitions library technicians is based at the Kangaroo Point campus library working four days per week assisting with staffing. While based at this campus, she handles lending and cataloguing for that campus. She also works one day a week at Southbank Central Library where she works both in the technical services area, as well as rostered Customer Service desk shifts as required.

From Monday to Friday all Lending and Technical Services technicians (apart from those that are working on the Customer Services desk) have two shifts of shelving. Shelving times are at 9 am and 2.30 pm. During this shelving time we are also available to assist clients with queries.

Where to from here?

We have done a lot of planning and have come a long way in the last 18 months, with more challenges ahead as the Kangaroo Point and Morningside campuses fully merge with Southbank Central Library.

New and exciting changes are being implemented to enrich our clients' library experiences. We have recently added enriched data from Syndetics to our library catalogue with supplier information of book jackets, table of contents and summaries added to our bibliographic records, as well as links to bookstores including McGills Bookstore and Amazon to the library catalogue. We are also in the process of creating Digibank, a digital repository to house teaching resources.

We have our work teams designated for the next 18 months, while we settle into the new environment and the rest of the campus classes and library collections move over to Southbank Central gradually by the end of 2008.

We will be looking at staffing and undertaking an audit of staff skills, working with both the Technical Services and Lending Services teams to see how we can keep staff multiskilled across the teams. Staff currently located in the Lending Services team have expressed an interest to work in technical services in the future and are keen to keep abreast of issues/work in the technical services area.

In-house training will occur for cataloguing, acquisitions and serials to further multi-skill our team and in June 2008 we will be upgrading Horizon to the next version which will be called Symphony.

With our goal to provide a more complete service to our clients and many projects to enhance and improve our library service, we are well on our way to fulfilling the goals we have set the team.

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