

A Joint Technical Services Department

ALAO 33rd Annual Conference
Greater Columbus Convention
Center
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Panel Participants:
Amy Badertscher, Kenyon College
Andrea Peakovic, Kenyon College
Sheryl Pustay, Denison University



Highlights...

- A combined Denison & Kenyon technical service team
- Combined work processes when possible
 - Materials processed at one location
- Work processes defined by material types



Why Combine?

- Do ***MORE*** not ***LESS***
- Streamline work processes
- Complete projects
- Incorporate electronic resources
- More options for staff to define their roles



Goals of Restructuring

- Improve access to information resources
- Create value-added services for our patrons
- Bottomline: Redesign with the user in mind



Our Context...

- Five Colleges of Ohio members
- Share an online catalog & joint storage facility
- OhioLINK members
- Similar in size, acquisitions and technical service staffing



How We Started...

- Pre-planning Committee
- Planning Task Force
- Hired Consultants
 - R2 Consulting
 - Maureen Sullivan
- Background Reading



Core Recommendations

- A joint approval plan
- Expedited delivery
- Replace paper with electronic flows wherever possible
- Use vendor-provided services
- Concentrate our intellectual resources in areas that we cannot automate

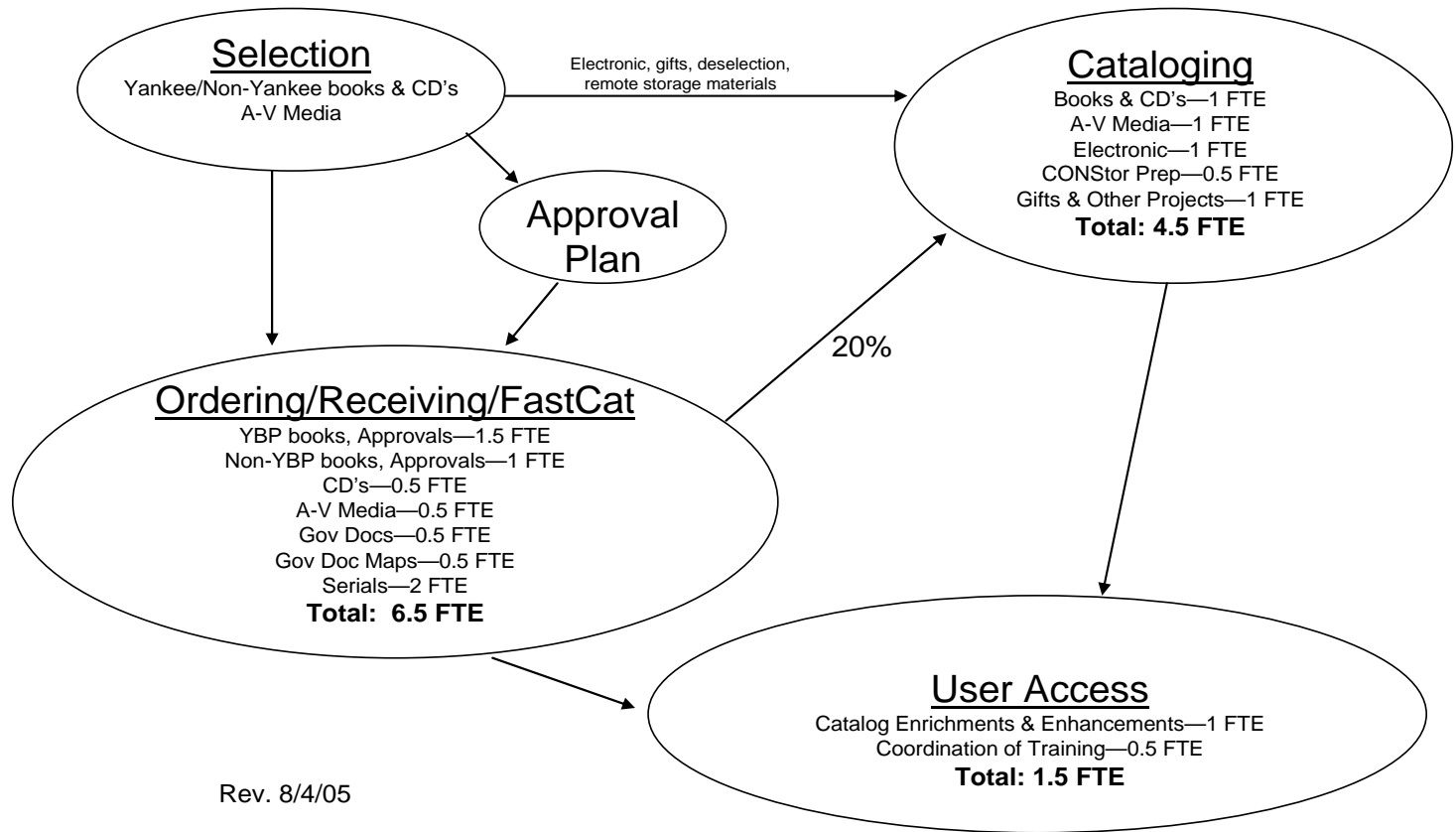


Implementation: What Now?

- Began with paper monographs workflow
 - YBP (Denison)
 - Non-YBP vendors (Kenyon)
- Developed staffing model
- Staff workflow assignments based on staff interests
- Expedited delivery service



DRAFT Staffing Model



Rev. 8/4/05

Total: 12.5 FTE

**Please note—the FTE's represented above are preliminary projected estimates!*

YBP Work Processes: To Do List

- Electronic invoicing
- Shelf-ready materials
- PromptCat profiles
- Design property stamps
- Transition orders to GOBI
- Shipping addresses
- Quality control



Non-YBP To Do List

- Develop online order form
- Create and modify vendor accounts
- Train staff in invoicing and Millennium
- Non-mainstream materials
- Standing orders
- Identify local cataloging practices



Lessons Learned...

- Details, details, details!
- The devil is in the details!
- Trial and Error
- Time-consuming process
- Expect work imbalances



Operational Perspective:

From the Viewpoint of a
Technical Services Staff
Member



Factors Important in Implementing the Program

- Include staff members in decisions
- Flexibility – different methods
- View the plan as “the process”, not “the person”



Include Staff Members

- Staff was included in initial planning
- Teams or groups were formed by material type
- Input leads to personal freedom and then to success



Flexibility

- Different methods for different material types
- Benefits will become evident



View Plan as “the process”, not “the person”

- When problems occur, look at the problem not at which college or person was involved.
- Be understanding
- Mistakes and miscommunications happen at all levels.
- How problems are handled leads to success.



The Combined Goal Is...

- To assist the faculty, students and staff on both campuses
- We are not here to heighten ourselves individually
- We are here to help the students reach greater heights for themselves



Just between “friends”

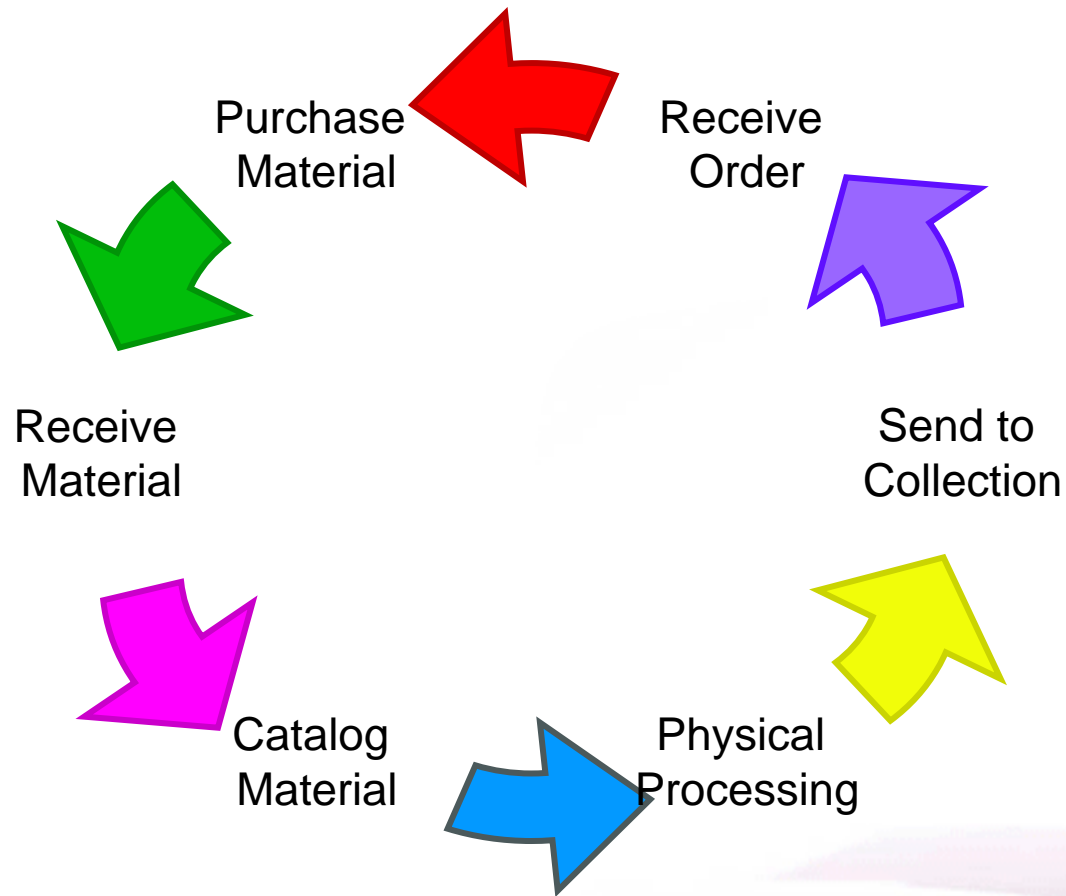


What is it all about

- The collaboration project focuses on acquisitions, serials and cataloging functions
- My role is a project manager and leader and spend time at each school
- Success of the project requires input and support from all



Is this all there is...



Where do we go from here?

- What are the next steps we should take to continue to make progress?
- The never ending “are we there yet” question?
- How do we address the issues of constant change?



Current Goals

- Evaluate all job descriptions
- Create documentation for all functions
- Increase training and professional development opportunities
- Continue to review and change



And Beyond....

- Shared government documents collection
- Shared classification method for all Audio Visual material
- A shared collection development plan including one approval plan
- One bindery source
- Reduced number of "paper" periodicals and a "shared" collection



Some things that might be holding us back?

- Separate locations
- Experience
- Forces outside of technical services
- Our own fears
- Procedural differences
- Lack of documentation
- Too many choices



Yes, we are progressing

- Quantitative measures are difficult
- Qualitative measures include time for:
 - Eliminate backlogs
 - Focus on special projects
 - Original cataloging
 - Enhancing catalog records
 - Shifting staff functions to rebalance work levels



Things to think about

- More shelf ready material from a variety of vendors
- Better methods of sharing information and communicating changes
- Eliminating overlap in our roles
- Increased time for special projects, database clean up, training, and other “back burner” things.



Final Thoughts

- We are rethinking roles and redefining positions as people retire.
- Traditional roles are changing and will require more flexible in the future.
- The knowledge base of workers entering the academic library market is different today than it was 20 years ago.
- We need to continue adjust and expand these positions.



For More Information...

[www.denison.edu/collaborations/ohio5
/libres/lwrtf/lwrtf.html](http://www.denison.edu/collaborations/ohio5/libres/lwrtf/lwrtf.html)

