Location: **Marist 109**  
**Time:** **Mondays, 7.00p-9.30p**

**Instructor Information**  
Amanda J. Wilson  
[ wilsonaj@cua.edu](mailto:wilsonaj@cua.edu)  
Office: 202-366-2480  
Mobile: 202-731-1804

Office hours are by appointment before or after class or another time as arranged by student and instructor.

**Course Overview**

**Description**  
This course provides a solid introduction to the fundamental terminology, concepts, and practices of library technical services, as well as the skills to deliver them effectively in the context of the rapid evolution in the packaging and dissemination of information, trends in staffing for technical services, advances in technology for operation and delivery of technical services. Emphasis will be given to the issues librarians face in managing technical services including the operations and techniques associated with the major functional areas of Technical Services (acquisition, physical processing, organization for access, and maintenance of library materials); current issues and future trends; tools, policies, procedures and processes for its provision; and the role of technical service departments within an organization.

**Goals and Objectives**  
The material presented in this course will provide a foundation for students to:
1. Gain knowledge and understanding of the major functional areas of library technical services.  
2. Gain a basic vocabulary of concepts that relate to library technical services;  
3. Develop an understanding of the context and current issues facing librarians in technical services;  
4. Develop skills in the practice of continuous assessment for process improvement in order to demonstrate the value of technical services; and  
5. Become familiar with professional sources of current information and discussion about library technical service trends and issues.

At the conclusion of this course, students should be able to:
- Articulate the goals and processes within a typical technical services department and its role in relationship to the larger organizational setting;  
- Apply appropriate communications skills for managing and leading a successful technical services department;  
- Evaluate success of library to provide meaningful access to its collection through the metadata display and navigation of the library's ILS and other systems;  
- Demonstrate awareness of a variety of information objects typically encountered in libraries, and how to acquire, describe, process, preserve and ultimately provide access to them in accordance with library's mission; and
Discuss policies and procedures for the effective management and provision of technical service.

**Instructional Methods**

Students will learn the theory and practice of technical services from lectures, class discussions, exercises, and projects. Course materials such as handouts, lecture notes, and discussion notes, will be posted on the course site.

**Professional Competencies Addressed in this Course**

American Library Association (ALA)


Knows the ethics, values and foundational principles of the library and information professions.

- Effective communication techniques (verbal and written)
- Knows the basic concepts, terminology, literature and issues related to the acquisition, disposition and management of specific items or collections of information
- Knows and demonstrated service concepts, principles and techniques that facilitate information access, relevance, and accuracy for individuals or groups of users
- The systems of cataloging, metadata, indexing, and classification standards and methods used to organize recorded knowledge and information.
- The principles involved in the organization and representation of recorded knowledge and information.
- The concepts behind, and methods for, assessment and evaluation of library services and their outcomes.
- Knows the principles of planning and budgeting in libraries and other information agencies
- Knows concepts and methods for developing partnerships, collaborations, networks, and other structures with stakeholders and communities the library serves
- The techniques used to analyze complex problems and create appropriate solutions.

Special Library Association (SLA)

[http://www.sla.org/content/learn/comp2003/index.cfm](http://www.sla.org/content/learn/comp2003/index.cfm)

- Manages the full life cycle of information from its creation or acquisition through its destruction. This includes organizing, categorizing, cataloguing, classifying, disseminating, creating and managing taxonomies, intranet and extranet content, thesauri, etc.
- Provides access to the best available externally published and internally created information resources and deploys content throughout the organization using a suite of information access tools.
- Negotiates the purchase and licensing of needed information products and services.
- Assesses, selects and applies current and emerging information tools and creates information access and delivery solutions
- Gathers the best available evidence to support decisions about the development of new service and products, the modification of current services or the elimination of services to continually improve the array of information services offered.
- Builds and leads an effective information services team and champions the professional and personal development of people working within the information organization.
- Communicates effectively
- Remains flexible and positive in a time of continuing change
Course Readings

Required Texts


Supplemental Readings

Additional required readings will be assigned throughout the semester to supplement the required texts and will be available through the course Blackboard site.

Course Assignments

This course has seven graded components that total 1000 semester points. Assignments and their weighting in the overall course grade are as follows:

1. **Job Ad Analysis** (10% -- 100 points): exploration and analysis of technical services job ads
2. **Technical Services Librarian Interview** (15% -- 150): interview of a technical services librarian
3. **Library Interfaces Comparison** (10% -- 100 points): evaluation of the views and navigation of library ILSs, discovery solutions, and/or federated search interfaces.
4. **Course Reading presentations** (15% -- 150 points): digest readings and facilitate class discussion on key points from our readings for a particular class session
5. **Term Project** (25% -- 250 points): written strategic planning assessment report and presentation on improving technical services covering budget, personnel, and technology
6. **Final Exam** (10% -- 100 points): a “take-home” final exam administered and submitted via Blackboard.
7. **Class Participation and Contributions** (15% -- 150 points): course is designed to be highly interactive. Students who contribute useful information to our class’s shared pool of knowledge will receive the highest grades in this area. Contributions must be made in a professional manner.

Scale for converting points to letter grades

A = 1000 – 940
A- = 939 – 900
B+ = 899 – 870
B = 869 – 840
B- = 839 – 800
C = 799 – 700
D = 699 – 600
F = Below 600

Instructions and expectations of each assignment will be discussed in class during the first meeting and again no later than two weeks before the assignment is due. Assignment descriptions will also be posted on the course Blackboard site.
Expectations and Policies

**Academic Honesty**

Academic honesty is expected of all CUA students. Faculty are required to initiate the imposition of sanctions when they find violations of academic honesty, such as plagiarism, improper use of a student’s own work, cheating, and fabrication.

The following sanctions are presented in the University procedures related to Student Academic Dishonesty (from [http://policies.cua.edu/academicundergrad/integrityprocedures.cfm](http://policies.cua.edu/academicundergrad/integrityprocedures.cfm)): “The presumed sanction for undergraduate students for academic dishonesty will be failure for the course. There may be circumstances, however, where, perhaps because of an undergraduate student’s past record, a more serious sanction, such as suspension or expulsion, would be appropriate. In the context of graduate studies, the expectations for academic honesty are greater, and therefore the presumed sanction for dishonesty is likely to be more severe, e.g., expulsion. ...In the more unusual case, mitigating circumstances may exist that would warrant a lesser sanction than the presumed sanction.”

Please review the complete texts of the University policy and procedures regarding Student Academic Dishonesty, including requirements for appeals, at [http://policies.cua.edu/academicundergrad/integrityfull.cfm](http://policies.cua.edu/academicundergrad/integrityfull.cfm).

Additional information can be found on the University Policies website at: [http://policies.cua.edu](http://policies.cua.edu).

It is expected that all students will adhere to accepted codes of ethical, personal, and civil conduct while in this class and conversing online, using e-mail, or engaging in any online chat sessions. Failure to abide by such codes of conduct and etiquette may result in withdrawal from the course and a failing grade.

**Plagiarism**

Academic dishonesty is defined in the guidelines as “failure to observe rules of fairness in taking exams or writing papers, plagiarism, fabrication, and cheating.” Any incidence of plagiarism will result in a grade of F (0 points) on the project or exam in question and will be reported to the Dean of the School of Library and Information Science for possible further action (including failure in the course).

Plagiarism will not be tolerated. Catholic University of America defines plagiarism to include such concepts as:
1. "Intentionally or knowingly representing the words or ideas of another as one’s own in any academic exercise;"
2. "Failure to attribute any of the following: quotations, paraphrases, or borrowed information from print sources or web sites;" and
3. "Buying completed papers from other to use as one’s own work.”

For more on what constitutes plagiarism and how to avoid it, see the guide on the Purdue Online Writing Lab web site at: [http://owl.english.purdue.edu/handouts/research/r_plagiar.html](http://owl.english.purdue.edu/handouts/research/r_plagiar.html).
Accommodations for Student with Disabilities
Any student who feels s/he may need an accommodation based on the impact of a disability should contact the instructor privately to discuss specific needs. Please contact Disability Support Services (at 202 319-5211, room 207 Pryzbyla Center) to coordinate reasonable accommodations for students with documented disabilities. To read about the services and policies, please visit the website: http://disabilitysupport.cua.edu.

Some of the on campus resources and phone numbers can be found at http://dss.cua.edu/Getting%20Started/index.cfm.

A Guide for services and accommodations for students with disabilities can be found at http://dss.cua.edu/Getting%20Started/documentationguidelines.cfm.

Some basic guidelines and links to other information may be found at: http://counsel.cua.edu/ADA/clicks/.

Required Technologies and Capabilities
The capabilities required for course delivery and student participation are Blackboard; standard CUA software; CUA library and information system accounts; ability to use ALADIN digital library resources; and ability to use presentation, word processing, and spreadsheet software. Every student should have daily access to a computer and high speed internet access.

Technologies and Capabilities Checklist
- Know your NT (CUA network) account information and be able to log on to the CUA network. Contact the Center for Planning and Information Technology at 202/319-4357 for assistance.
- Know and use the SLIS technology support. SLIS webpage: http://slis.cua.edu/tech/guides.cfm
- Know and use the SLIS resources available. url: http://slis.cua.edu/people/studentgateway.cfm
- Know how to use the CUA library resources, including the ALADIN online system. Visit the CUAT library homepage at http://libraries.cua.edu for assistance.

Campus Resources for student support
CUA Center for Academic Success http://success.cua.edu
CUA Counseling Center http://counseling.cua.edu/services/
Mullen Library http://libraries.cua.edu/welcome.html
Career Services http://slis.cua.edu/people/career.cfm

Formatting Assignments
- The first page of each assignment/report must be a cover page in the style of your choosing. This cover page does not count toward the page limit guidelines for each assignment.
- Assignments, papers, and projects should be typed, double-spaced, with a font size of 12.
- Citations may be done in any form as long as the format is consistent and complete.

Submitting Assignments
All assignments for the course should be submitted electronically through Blackboard.
● Graded assignments that are due the day of a class meeting should be submitted before class (by 6:59pm) to the appropriate section in the course Blackboard website. Please have access to your assignment (in print or electronically) to use during class discussion.
● Graded assignments that are due on non-class days should be submitted by 11:59pm on the due date to the appropriate section in the course Blackboard website.
● Late assignments will be assessed a half letter grade penalty per day. Assignments that are later than a week (7 calendar days) will not be accepted and grade of zero points will be marked.
● Note: In order to receive credit for the final exam, it must be turned in on time due to the CUA final grade posting policies.

Participation and Conduct

● Behave respectfully. Students are expected to behave respectfully while in class. Participation grades will reflect a student’s maturity level and professionalism.
● Participate actively. Participation is essential to being successful in learning and fostering learning in others. Participation should be supported by reading the material before class and making an effort to be thoughtful in your remarks.
● No phone calls or texting during class. Turn off or silence cell phones and pagers. Generally, students leaving the room for calls are not allowed to return to that class session. If you expect an important call or communication during class, please alert the instructor before class.
● No off-topic internet access during class. Students are expected to engage in the classroom lecture, discussions and group work. Students reading using the web during class, in other than course related ways, will be asked to leave that class session.
● No grade discussions in class. Instructor will not discuss grades in class. First consider why the instructor deducted points. If you still disagree, explain your disagreement in an e-mail to the instructor.
● Attendance is mandatory. Attendance is required, in keeping with university policy. Students may miss up to 3 classes without a penalty. Your participation grade will drop by 10 points for every absence after 3 missed classes.
● Late arrival. Quietly pick up the handouts at the front of the class, sign-in on the sheet at the front of the class, and take a seat without disturbing the class that is in progress.

Contacting the Instructor
If you have any questions or concerns about the class schedule or assignments, please feel free to call, e-mail, or talk with me in person. If you prefer to talk in person, I am available to meet with you before class. Contact me two of days in advance to organize and confirm the details for a meeting. Contact information is on the first page of this syllabus.

Syllabus
The instructor reserves the right to make changes to this syllabus if circumstances warrant such change. All changes will be provided to students via Blackboard.
### Course Schedule

**Course Topics Overview**
- Introduction to course
- Major service areas of Technical Services
- Administration of Technical Services (trends, resource planning, and assessment)
- Books, Serials, Non-Book Material and Digital Resources
- Why is it essential that you are a skilled communicator?
- How does what we do impact what the patron sees in the OPAC?
- Publishers, Vendors, and other service providers
- Cooperation and Consortia
- Preservation, Digitization, Disaster Preparedness
- Trends and Change in Technical Services

### Course Outline

This calendar is subject to change depending on class needs. Supplemental readings are available on the course Blackboard site. Expect 2-6 additional readings (chapters, articles) or resources for each session.

<table>
<thead>
<tr>
<th>Week</th>
<th>Occurrence</th>
<th>Topic</th>
<th>Required Text Readings</th>
<th>Assignment Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>29 August</td>
<td>Course introduction and Technical Services introduction</td>
<td>Evans, Intner, Weihs – Chapter 1 (skim)</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>5 September</td>
<td>NO CLASS (holiday)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>12 September</td>
<td>Administration of TS (current issues and human capital management)</td>
<td>Evans et al. – Chapters 1-4; Eden – Chapters 1-2</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>19 September</td>
<td>Administration of TS (human and fiscal management and budgeting)</td>
<td>Evans et al. – Chapter 12; Eden – Chapters 3, 5, 8</td>
<td>Assignment 1: Job Ad Analysis</td>
</tr>
<tr>
<td>5</td>
<td>26 September</td>
<td>Acquisitions (overview, publishers and vendors)</td>
<td>Evans et al. – Chapter 5-6</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>3 October</td>
<td>Acquisitions (books, serials, e-resources)</td>
<td>Evans et al. – Chapter 7-9</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>10 October</td>
<td>NO CLASS (holiday)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>17 October</td>
<td>Acquisitions (non-text, data, institutional repository, and government information)</td>
<td>Evans et al. – Chapter 10-11</td>
<td>Assignment 2: Librarian interview</td>
</tr>
<tr>
<td>9</td>
<td>24 October</td>
<td>Acquisitions (consortia and partnerships; gifts and exchanges; workflow analysis)</td>
<td>Eden – Chapters 6, 7</td>
<td></td>
</tr>
</tbody>
</table>
Assignment Descriptions

1. Job Ad Analysis (10% -- 100 points)
For this assignment, review and analyze vacancy announcements for technical services positions. You may choose to complete a comparative, longitudinal, or other analysis of any subset of vacancy announcements. Analysis should be supported by references from course readings or other peer-reviewed literature. Keep copies (print or digital) of vacancy announcements you find and use for this assignment.
Deliverable: 3 page paper

2. Technical Services Librarian Interview (15% -- 150)
Identify and interview a librarian in a technical services position, preferably in leadership. The interview should elucidate the interviewees organizational context (i.e., budget, staffing, programs, services), challenges they may be facing, detailed description of a process or procedure s/he manages, and success measures. The resulting paper should provide a snapshot of the current state of technical services (people, processes, and technology) at the interviewee’s library and a vision for the future (from the interviewee or from your own analysis). If some of the data above is not applicable or the interviewee is unable to share, please provide your best estimation of the missing data. This assignment will be the foundation for your final project; a thorough job now will benefit you in your final project. Include your interview questions in an appendix.
Deliverable: 5 page paper

3. Library Interfaces Comparison (10% -- 100 points)
Select at least two library interface platforms for comparison and analysis. This could be an ILS’s web OPAC (e.g., Innovative Interfaces or EOSi), discovery interface (e.g., Summon or
Primo), or federated search platform (e.g., MetaLib). Report should include discussion on views, navigation options, level and breadth of access to the universe of a library’s materials (e.g., institutional repositories, special collections, e-resources), services, and patron-connectedness. What areas need improvement? What areas address current issues in technical services covered so far in the course?

**Deliverable:** 3 page paper + screen shots or other images (if applicable)

4. **Course Reading presentations** (15% -- 150 points)
   For your assigned class session, review and prepare a lecture presentation, handouts, and at least one exercise or activity that illustrates the key points of that session’s reading materials. Use these materials to facilitate class discussion around the readings (plan for 50-60 minutes). For at least one sub-topic in your session, locate an example of assessment or measures of success. Questions at the end of the Evans et al. (2010) chapters may serve as your starting point for identifying key points. For those sessions without assigned readings from Evans et al., the instructor may serve as that source. The instructor will model this assignment in the first four sessions of the course. This could be a team or individual assignment, as determined on the first day of class.

**Deliverables:** handout(s) covering key points from the required readings, at least one example of an assessment measure or performance metric, and leadership of class discussion and activities serving to review readings (50-60 minutes of materials).

5. **Term Project** (25% -- 250 points)
   Based on the Technical Services Librarian interview and the concepts learned throughout the course, reflect on and analyze the current state of technical services in your interviewee’s library and prepare a strategic planning document for the next 2 years. Assume that you will be able to hire 1 new position and will get a one-time increase of 10% of annual budget within the next 2 fiscal years. Sections should include a human capital assessment and needs analysis (including a sample vacancy announcement), analysis of programs and services (what stays? what should be sunset? what should be added or completed?), changes, if any, in collections, resources, and tools available to users, impact on budget allocation after the transition, and what metrics will be used to assess success. Identify and detail at least one process or procedure to be improved and describe your steps for planned implementation.

**Deliverables:** 1-page executive summary, 8-10 page paper (15%), 20-minute presentation to be delivered to the class (10%).

6. **Final Exam** (10% -- 100 points)
   The final exam comprises 5 short-essay questions asking you to reflect on the content of the entire course. The questions may be answered in 1-5 paragraphs and should include citations from course literature to support your responses.

**Deliverable:** 5 short-essay responses

7. **Class Participation and Contributions** (15% -- 150 points)
   Participate actively in class sessions and activities. Ask questions of guest speakers and discussion facilitators. Remain engaged throughout the sessions.