LSC 603: Introduction to Technical Services
Fall 2007 Syllabus

Ellie Briscoe, Manager of Technical Services, National Geographic Society Library
Email is preferred: ebriscoe@ngs.org

Office phone: 202 857-7050
Office hours: 8:00 am-4:30 p.m. M-F. It's best to email to set up a time for a phone call. I can arrange to meet with you after class, if needed.

Call or email if you have questions!

Scope of class:
The catalog says, “Survey of current operations and techniques associated with the acquisition, organization for access, physical processing, and maintenance of library materials.”

This class is a bit broader than that. Without duplicating in detail the content of the cataloging, systems, collection development, preservation, or organization of information classes, this will be an exploration of "technical services:” what is has been, what it seems to be now and where it may be going. I hope to give you some tools to use, an understanding of current best practices, and practice at making decisions involving processes and considerations for this work in a range of types of libraries and information organizations for print, non-print and digital “collections.”

Course objectives:
Students will gain knowledge of the major areas of Technical Services, become familiar with the vocabulary and concepts, understand the current issues, and find out where to find out more, in the "real world."

Course conduct:
We will be exploring the topics together. Some of the lectures will be from guest speakers, local experts in the field. Reading the literature and talking on your own to people working in the field is essential. There are no "right" answers; there are no quizzes or exams. This is a forum for you to ask questions and figure out approaches for action, just like real life. I don't want to you make up answers, however; when a question is posed, find an article or two and read them, analyze them, use them, ask an expert, call a vendor, go to a meeting, visit someone else who has faced the same question--just like real life.

Grades will be based on your class participation and projects, evidence of independent study and involvement as well as teamwork. There will be class discussion of the assigned reading.

There will be three "light" projects, and one final project. Use good business writing for assignments, rather than an academic style. Put your conclusions up front, and make them short and pointed. Bullets and lists are good.

Project descriptions, class schedule and this document are all on Blackboard, mostly so you can click on the hyperlinks. A user id will be distributed at the first class meeting.

Class will not meet September 27; an alternative activity will be assigned.
Grading Policies

Light project grades: 3 projects @ 15 points, possible 45 points.
15 points: excellent, all relevant aspects considered; 10 points: solid work but some things overlooked, or not clearly thought out; 5 points: it got turned in but shows no real effort. 0-turned in late without permission, or not turned in. Errors in grammar and spelling or poor presentation deduct a half point each.

Final project: 45. See project description for grading plan. A point will be deducted for each "point" not thought through or omitted, and the usual half-point for grammatical mistakes or spelling errors.

Projects should be Word documents and submitted to the instructor by email no later than 3 p.m on the day they are due. Projects will be given zero points if turned in late without permission, or not turned in. One half point will be deducted for each day late.

Class participation: 10 points possible, one per class. A point will be deducted for each unexcused absence; all you have to do is let me know you won't be there. If you are unable to participate in a class due to absence or illness, an email in advance with a paragraph of your reaction to the reading will be an acceptable substitute. If you must miss class, arrange to get notes from a fellow student. I will not issue lecture notes.

Textbooks:
For each assignment, work through the review questions, make notes, email me any questions you want highlighted at class, and we will discuss in class. You will not be turning this in but you'll learn a lot from the process. We will usually discuss at least ONE of their questions at start of class. NB: we will mostly NOT use the chapters on cataloging, the cataloging classes cover this much more thoroughly.

Chapters are mostly short, skimmable; case studies will be useful later in semester

For some classes, additional reading may be assigned. See the course schedule for details.

GRADUATE AND UNDERGRADUATE STUDENT ACADEMIC DISHONESTY

Please read the University policy on at http://policies.cua.edu/academicundergrad//integrity.cfm

In part, the policy reads:

Academic honesty is one of the foundations of the educational mission and Catholic commitment of this university. Academic dishonesty, including such practices as cheating, plagiarism and fabrication, undermines the learning experience, and, as it involves fraud and deceit, is corrosive of the intellectual principles and is inconsistent with the ethical standards of this university. Ultimately, academic dishonesty destroys the sense of trust and community among students, faculty, and administrators.
This Policy sets forth the standards of honesty which student members of our academic community are expected to follow. The faculty is also bound to adhere to the strictest standards of academic honesty. All members of the academic community have an obligation to familiarize themselves with these standards and to conduct themselves in accordance with both their letter and their spirit. Individual Schools in the university have committed themselves to implementing these standards and to educating faculty, staff and students on the importance of academic honesty and on the application of these standards in a variety of academic settings.

This Policy also sets forth a system for enforcement of these standards, including the application of sanctions where violations have been found. Sanctions are necessary to demonstrate that the university treats violations of academic honesty seriously and will act aggressively, when necessary, to deter wrongdoing. The effectiveness of the enforcement scheme depends in large measure on the conscientious cooperation of members of faculty in the implementation of the standards. Faculty members are therefore charged with the responsibility of seeking to assure student compliance with the requirements and initiating enforcement proceedings where appropriate.

**ADA Policy:**
Students with disabilities requiring accommodation under federal regulations must present a written accommodation request to the instructor by the second class meeting. It is strongly recommended that the student contact the CUA Office of Disability Services in Suite 207 Pryzbyla Center (Phone: 202-319-5211; email: cua-disabilityservices@cua.edu; Website: http://disabilitysupport.cua.edu) to coordinate accommodations. This is the University office responsible for disability accommodation and services, and its staff can answer questions about services and requirements regarding documentation. Special accommodation or other arrangements cannot be made without documentation approved by this office. Refer to the CUA Policies and Procedures on Disabilities Support Service and CUA ADA Guideline for more information on the CUA ADA Policy.
Light project No. 1:
Due: September 6
Find at least three job descriptions for current openings for technical services librarians in three
different kinds of libraries, such as public, academic, special (law, medical, corporate, non-
profit), or school.
List the three, and summarize: What characteristics do they share? What competencies and skills
are in demand? The job title might not say "Technical Services;" what other titles are used?
This report should not be longer than two or three pages.

Sites you may want to check out:
http://jobs.libraryjournal.com/
http://www.lisjobs.com
http://joblist.ala.org/
http://www.ala.org/ala/education/empopps/employmentopportunities.htm
http://www.acqweb.org/lis_empl.html
http://www.nypl.org/jobs
http://www.corestaff.com (and look at library services)
Light project No. 2:
Due: September 20
(Don't panic; this looks long but won't take long, you may work with a partner, and it's fun):
Spend ten minutes at http://www.lib.ncsu.edu/endeca/
North Carolina State University's new search interface on their catalog; sits "on top" of their Sirsi Unicorn catalog, doesn't replace it. This is another approach to the same issues the Arlington Aqua browser is designed to resolve.

Take 15 minutes go through one of the Endeca PowerPoint presentations:
http://www.lib.ncsu.edu/endeca/presentations.html
Especially note the navigation stats. A surprisingly significant use is made of subject headings and LC classification—the human-assigned finding information.
http://www.lib.ncsu.edu/endeca/presentations/200611-arcl-dvc-endeca.ppt#310,27,Usage statistics

Then identify a book of your choice that has a record both in ALADIN and in the NCSU catalog. Use something slightly tricky—for example, a critical book about "Tom Sawyer" or a U.S. president, with a personal name that might appear as a title, a subject, or an author. Take a look at the bibliographic data behind the display record; both catalogs have MARC display you can choose to see.

Then ask a friend or relative who is NOT a library student nor a librarian find that same book in each catalog WITHOUT using the help pages. You should help them navigate to the initial search pages, but don't actually help them search; just observe. Report back via email to ebriscoe@ngs.org or in class what they did, and what part of the metadata you think got them there.

These are the URLs for the initial search pages:
1. ALADIN:  http://catalog.wrlc.org/cgi-bin/Pwebrecon.cgi?DB=local&PAGE=First
   (ALADIN is the shared catalog for CUA and half a dozen other universities; it doesn't have to be a CUA copy that you find)
2. NCSU:  http://www.lib.ncsu.edu/endeca/
Light project No. 3:
Due: October 8
Identify a vendor of books, periodicals, online services (such as databases) or contract services, and interview a representative in the context of one of the libraries in project 2. You may work from the list of ALA conference exhibitors at http://12.153.51.190/_event1/expoexchange/exb_directory.asp
IF you currently work in a library, this must be a vendor your employer does not currently use, and with which a library might reasonably set up an ongoing purchasing relationship, not a one-time purchase, and preferably one that offers a variety of services.

For example: EBSCO, Swets, Baker and Taylor, Yankee Book Peddler (part of Baker & Taylor), Ingram, Casalini… even Amazon has library programs.
Find out: What services does the vendor offer? What are the terms? What did you have to ask, vs. what you could find out on their website? What sets them aside from their competition? What sort of discounts do they offer? Can you pay electronically? Do you get ownership, or just access, if it's an electronic product? Is there anything about their service that might make you adjust processes at your library to take advantage of them? What do other customers say about them? We will brainstorm additional questions in class.

Helpful site:
http://www.olc.org/pdf/TechKNOW_Nov03.pdf#search=%22vendor%20questions%20fulfillment%20discounts%20library%22
Skip down to the section on buying AV resources, with a list of vendors and questions to ask them (to start you thinking).

Note: Identify yourself VERY clearly as a library school student; it would not be ethical to pretend you are interviewing the rep for a real purchase. Set a time limit and ask if they can spend that much time to help you, and if possible send them your questions in advance.
Final Project: Pick one of the three scenarios listed below. If you have questions that are not answered in class or by reading this description, ASK!

Content:

All of these projects should POSE the problems and questions relevant to your selected scenario, based on the topics covered in the course, and then give recommended ways to make the decisions. Teams may be two or three people. Each team member must deliver part of the presentation. Time allotted for the presentation will be set when I see how many we have.

Demonstrate your grasp of the relationships between technical services processes, and between those processes and the rest of the library. Make it obvious you are familiar with the language, issues, options. I do not necessarily expect recommendations for action, but a reasoned approach to how to make the decisions, factors to consider, made with awareness of the state of library technology and realities today. You sketch should take note of equipment needs, including support for technology.

Include considerations reflecting on these topics:
Standards
Collection development and acquisitions policies for serials and monographs, and the trend toward digital resources
Acquisitions
Centralization and consortial issues
Integrated Library System (ILS)
Access services (circulation), Inter-Library Loan (ILL), document delivery and rights management
Preservation (both print and non-print) and binding
Budgeting and audit control, working with vendors, EDI
Staffing: outsourcing, training, competencies
Work flow planning and analysis
Effect of Tech Services decisions on current and future user needs.
Cataloging criteria
Ongoing maintenance and training

Resources:
Use what you learned in class, use the textbooks, find additional articles in the library literature. At least one source MUST be an interview with a working librarian who has faced a similar scenario in the past. A list of willing interviewees will be provided.

Format of presentation and paper:
Final projects will be turned in as a paper AND presented as PowerPoint presentations as if making a proposal for approval by an employer. In the paper, there should be attribution for where you got the information. The final report itself should be no longer than 12 pages. This report might be easiest to organize if you approach it as if you are a consultant who wants to be hired to solve the problems posed by the event in the scenario. Your report should be written as if to someone who is NOT a librarian: the head of the school, or the town council, or the agency
requiring the merge; but of course you know they'll give it to a panel of experts to review, so include no BS or hot air.

Another approach would be to write it as if it's a year later and you're writing it up for a professional journal. I think that's actually harder… feel free to include images. Small images.

Sections to include, not necessarily strictly in this order:

Set the scene: 5 points.
Describe the situation. What do you KNOW about it? Is it part of a system or consortium? This is where you describe the real library or libraries that you're modeling on, either one you work in or one you visited, or make it up if it's completely imaginary. For scenario 1 and 2, briefly describe the library before the disaster, or the two libraries before the merge. For scenario 3, describe the conditions in the library. For example, the attorneys all may have personal collections, if it's a law library; or, the teachers have classroom collections and they've been using the public library down the street but that's closing; etc.
Identify the event. "These libraries must merge" or "A moving van drove through the school library" or whatever.

Describe the intended outcome of your proposal: 10 points.
What are you proposing? How will you know if you succeeded in your plan to reorganize, restore the collection, form one library? What problems must be solved for the outcome to happen?

Best practices and literature review: 5 points
Is there already a set of best practices in place for dealing with this situation, these problems? What have others done? You'll want to append a short bibliography of journal articles or other sources you found. Note personal interviews as sources.

The guts of the issues: 15 points:
Analyze the aspects of tech services in your library and how they make a difference. What problems has your scenario set up for each of these? What steps should be taken to ensure they happen appropriately? If you can't recommend steps, what information needs to be gathered to determine steps?

Powerpoint and presentation: 10 points.
Are you clear on the scenario? Did you condense your report to its essence for the presentation? Did you know enough to be able to answer questions, not just read the screens?

In a real report like this, you'd expect to include how long you think the project will take and what it would cost. If you can reference other projects and give that information for them, that's extra credit. There isn't any way you can really come up with it for an imaginary scenario.

There will be areas that are outside the scope of tech services for your chosen library, but which affect it. Examples: Your library might not have an integrated library system or servers to run it, but in order to set up tech services, you need to know if there will BE one or you may need to
recommend that they get one, and say what it could do for them. You might not have catalogers, but you will need to consider where cataloging, if any, will be done (in house? Outsourced?) and what factors affect those choices.

Do not include activities that are traditionally considered public or user services, or strictly administrative: general library operations policies, or how you are going to continue to provide reference service during the merger or recovery, for example. Keep budgeting discussions to tech services areas. Don't spend a lot of time or energy deciding on furniture or floor plans.

SCENARIOS:

A. Recover from a disaster.
Your library's collection is partially destroyed by a disaster. At least half of the collection is damaged, and another quarter is destroyed completely. Describe a plan for Technical Services processes to recover the collection, and to provide service during recovery. This is not an emergency evacuation plan; this is what comes after that and should be limited to the role of tech services. One approach might be to consider what your library would be like if you could start from scratch today. If your library already has a detailed disaster plan, do not pick this option, please! (If it doesn't, this could be a great choice.)
Consider: Pick a likely disaster (Hurricane? Earthquake? Bomb? Avian flu--what if half the staff is sick and the post office and UPS are out of commission?) Loss of water and electricity? How would the whole library be affected? What roles might TS staff have to play other than their normal work?

Relevant text: Eden, Chapter 16.

B. Merge two libraries.
Identify another institution with a similar line of work as your own. Devise a plan for merging these two institutions and libraries. Assume at least part of the staff is let go or decides not to move to a new location; there are existing contracts with vendors; migration of data from one ILS to another; working out differences in collection development policy and cataloging practice; physical merging of the collections and services.

Suggested models to explore: Woods Hole Oceanographic Institution/Marine Biological Lab; law or accounting firms that merged; a school district with declining enrollment and which is eliminating schools and combining the remaining schools, or military bases which were BRACkced and functions moved to new locations.
Relevant text: Eden, Chapter 11.

C. You are head of a very traditional small college library, where technical services and public services are two completely separate units, and you've been given the mandate to "make the
library more digital." Assuming you've been given the budget to achieve this, how will you restructure your Technical Services department? What processes will this affect?
Eden: half the book is about this kind of thing…