SCOPE OF THIS CLASS

This class covers the “behind the scenes” operations and organizational structures that support the library, the traditional meaning of “technical services,” but also includes the very important policy issues confronting each library.

Technical services was a term first applied in the literature in 1939 to encompass tasks supporting the library’s roles and programs through the identification, access, and organization of the required resources. These resources almost always were published materials until the latter part of the 20th century, and so it was easy to define technical services in a very narrow pyramid managerial style of libraries of that day. It was also reflective of the relative stability of both libraries and their communities and their relationship to one another. The library was “the” place one went to seek information; the library is now an edifice and an interface, to quote Walt Crawford. Technical services was the term also used to describe the combined organizational units of acquisitions, collection development, cataloging and processing. Cataloging was the undisputed core of technical services. Many of the operations in technical services were repetitive and clerical – the typing of catalog cards, for example.

Acquisitions, collection development, cataloging and processing are still required today, but they are only part of the story behind what it takes to support a library. Libraries are driven by new needs, new expectations, new resources, and swiftly evolving visions for their roles in the communities they serve. At the same time, both community and library are adapting to rapidly changing technologies, especially in communications, and ubiquitous literary and information resources in growing arrays of formats. The neat and routine compartmentalization of support into an assembly line of processes is no longer the norm.

This class examines

- the interplay between resources, needs, and technology that have evolved to organize the “stuff” – tangible and intangible of the library throughout history;
the vocabulary and standards guiding technical services, past, present, and proposed future;

the interrelationships of choices open to the library and how to select the best options in the ever-growing array of alternatives, including the proliferation of vendor services, outsourcing, and contract possibilities. It is also impossible to ignore the place of the library within its cultural setting.

and

the basic operations and organization of services in libraries today.

This is not a “how to” course, but it is very practical; it is an overview delving deeply into the issues confronting the management of library resources:

- Historically, the classical functional areas of “technical services” and resource management including collection development, acquisitions, cataloging/catalog maintenance, circulation, evaluation, technology, binding/preservation, etc., and how they have changed, merged, and been re-defined to include intellectual property rights management and the impact of library globalization.

- Standards

- Resource sharing

- Legal issues, particularly those affecting the “non-print” versions of library resources, including works developed for the library and the current struggle over copyrights

- Dissolving geographic limitations of libraries and library collaborations

- The need to balance technology and traditional library resources appropriately

- The selection of technology

- Addressing library user needs as the library’s base of users shifts: the shift of library user from patron to user to customer to client

- Moving from a “stand-alone” institution of an organization existing within an information ecology

Course Objectives

- Become familiar with the operations and standards supporting the library’s selection, identification, organization, and distribution of packages of information for a community of users

- Gain the ability to analyze and make choices in the array of organizational and technological options for a particular library situation

- Obtain an understanding of the relationship between technical services operations and the rest of the library
- Develop a grasp of the challenges facing traditional/digital/electronic/virtual libraries as they evolve
- Gain an appreciation of the interactions of library departments and also the library within its service community
- Learn how the library makes information meaningful and useful to the library’s users

**Course Structure**

- Extensive notes are provided at each class meeting. They include all the written and reading assignments at the end. Although I will pass out hard copies of these notes, you may request having them sent to you electronically to assist in easy linking to the online resources if you wish.

**Assignments**

- Written assignments are included in the handouts each session; there are neither quizzes nor “blue book” exams in this class. Your written assignments are “rolling exercises” designed for you to apply theory to an actual situation of your choosing – i.e., “your” library.” As you learn more during the course, you will naturally revise your analyses. Those assignments will stimulate class discussions and will form the basis for your final paper. That paper and your contributions to the discussions form the basis for your grade.

Most importantly, the “mini- drafts” are intended to deepen understanding of the subject as it applies to “your” actual library situation – either the library in which you now work or the library type in which you plan to pursue your career. They are designed to simulate real-workplace challenges of applying theory/research to practice. The questions are general in nature and need to be answered in a context supplied by the student. They are intended to reflect the ambiguity of the workplace, not the pure response of the theorist alone!

All assignments, until the final submission, are considered “drafts” that are paced to follow the discussions, readings, and lectures in class. All of these assignments are “building blocks” that are “folded” into the final paper at the end of the semester. Each draft should be submitted to me as a file attachment via my Fairfax e-mail account.

Since I do not have office hours on campus, you are encouraged to submit your drafts as you develop them online. I will make comments and suggestions back to you using the MS Word “track changes” feature. These comments and suggestions may be accepted or rejected by you – we are in a dialog! The expectation is that you may raise questions and seek specific clarification after your initial research before completing the paper. All student work is self-paced and may be submitted as a collaborative effort with other members of the class.

- If you use MS Word when you send me your drafts as e-mail attachments, I will turn on “track changes” and incorporate comments into the body of your paper suggesting areas you may consider for revision, enhancement, etc. Then I will return the paper to you. As you learn more during the course of the semester, I expect that you will want to make even more changes on your own. There is no limit to the number of times that you may re-submit your paper showing revisions and raising questions.
Although much of the material covered is technical, the overarching reasoning is most important, and each student is encouraged to don “two hats” – that of the librarian and that of the library user as we discuss the issues.

This class takes a Socratic approach in instruction; you will be learning from each other, your own questions and investigations as well as the lectures and readings. “Assignments” are open-ended by design to challenge you to explore as much as possible and to accommodate interests in various library types (e.g., special, school, etc.)

**Class Substitutions**

If you are unable to attend a class, don’t worry, as the notes and assignments will assist in your catching up a single class. For more prolonged absences, please speak with me.

**Basis for Grading**

- 25 percent of the grade is for contributions to class discussions.
- Any/all assignments may be done collaboratively.
- All assertions supporting your conclusions must be cited. Appropriately cited Internet sources and interviews may be used as sources.
- All statements taken from other works should be marked as quotations (i.e., “. . . .”) and clear attribution should be made.
- You are encouraged to use a Web-based educational site focusing on the fundamental research skills provided if you have not had a basic research class recently.
- You are expected to adhere to the University policy regarding scholarly integrity and abstain from plagiarisms.

**Course Texts**

There is no “text book” for this course. I abandoned the use of a textbook several years ago when the pace of developments and research in the field rendered the printed texts obsolete. I do provide a list of background materials that are in book form, but those are suggestions.

**Texts**

Because of the very dynamic nature of technical services, required readings will appear at the end of each class’s lecture notes and will rely heavily on sources on the Internet and in recent serial publications. Some of these we may explore together during class using “Web Safari,” while others you will seek out yourselves. The background books can be used as you see fit; however, they are not recommended as primary sources because of their datedness. The texts any Organization of Information courses you have taken may prove very helpful, however.

Several books in regular trade editions, found easily in libraries, in general bookstores throughout the metropolitan Washington area and on [http://www.addall.com](http://www.addall.com) are very useful. It is your choice to decide which are important for you to own. Your focus should be on the content, not adoption of a particular text. The readings in the resource notes are purposely
inclusive of the many library types, i.e., academic special, school, and public as well as general works.

As background, the instructor refers often to the following:


Dr. O’Donnell wrote this book while holding the dual roles of professor of classics and director of technology at the University of Pennsylvania; his specialty is the 6th century. He is presently at Georgetown University. His book is a lively exploration into how, when and why recorded texts evolved.


Mr. Petroski is an architect, author of many provocative works in which he muses on technology is both a response and catalyst for change. In this case he explores the interplay of the form of recorded literature and its storage and how the latter modified building requirements to change the buildings holding collections and how we use them. In one pithy observation, he calls the desktop PC the “chained books” of our time. . .


John Seely Brown was the director of the famed Xerox Palo Alto research center, and Paul Duguid is a member of the UC Berkeley faculty. They make a strong case for the need to mind knowledge issues as well as information issues and recount the role of story telling in problem solving. Every class hears me tell the “vinegar story” from this book over and over – this book, witty as it is, also asks profound questions about how we internalize, integrate and use information.


This is just one of Dr. Birkets’ books lamenting the loss of reading in our culture and ponders the possible consequences.


Joe Matthews is not a librarian, but he has spent his life as a library consultant. This book marks the beginning of his current efforts in refining library impact measures – one of the hottest topics in today’s contention for support and funding for libraries as they respond to the question, “Since everything is on the Internet, why do we need libraries?”

For historical perspectives, some of the following books are in most library science collections:


This standard text is organized around the traditional working units in technical services departments. The Table of Contents is appended to this syllabus.

This book is intended to be a textbook for technical services classes and provides a sweeping overview of the area. However, its treatment of topics is very uneven and incomplete. It is a compilation of chapters from various libraries in the field; it is not current. It is useful to treat this source as you would an encyclopedia – finding definitions and citations. Earlier editions of this book cover different topics – the latest includes preservation, for example. I encourage you to use all three editions as references as you find appropriate. The book emphasizes academic libraries in its discussions. Use the table of Contents for each edition to guide you. Use and quote with caution!


This book has a wonderfully practical approach to decision-making in the adoption of technology. This book is remarkably useful despite its age, and it is very quickly read.


Another standard text – now very dated.


This book is now 25 years old, but it is fun to see how many of Prof. Lancaster’s predictions came to be! Remember, this book was written before the PC, before the Internet, before digital books. It will remind you about how quickly the entire field of information science evolved in the past 20 years, and the pace of changes is not slowing. Prof Lancaster has a wry sense of humor.


The title tells it all: technical services departments everywhere are being re-thought, re-organized, re-developed! It is a compilation of case studies of libraries that have undergone and reported major re-organizations. There are extensive bibliographic references throughout, and one comes to realize that even defining the term “technical services” is a challenging task – a far cry from the previous attempts to link “technical services” to a series of specific tasks.

You are encouraged to subscribe to f I @ S t m ű d @ Y, a peer-reviewed journal on the Internet devoted to issues of libraries and information. It is free; appears on the first Monday of each month; and can be found at: http://www.firstmonday.dk

How to Reach the Instructor

Phone: 703-324-8311 (Work)
703-765-2236 (Home)

Fax: 703-222-3193

E-mail: Preferred: Vera.fessler@fairfaxcounty.gov
Alternative: vfessler@hotmail.com
Class Schedule, Fall 2008

We will meet in Conference Room 10 in the Fairfax County Government Center for all meetings except for September 29, October 6, November 3, November 24, and December 1, when we will meet in the Library Administration suite, #324.

Please confirm that class is meeting during any inclement weather or area wide power outages!!!

   Course Introduction and the Historical Development of Technical Services
   
   NO CLASS ON SEPTEMBER 1: LABOR DAY

2. Monday, September 8, 2008
   The Expanding Concepts and Uses of Catalogs, Indices, and Other Means of Resource Access
   Accommodating physical access as well as intellectual access

3. Monday, September 15, 2008:
   The Languages and grammar of access: the Meaning of “Metadata”: MARC, Dublin Core, EAD, Metadata – their uses and implications

4. Monday, September 22, 2008:
   Collection Management

5. Monday September 29, 2008 (Suite 324):
   Acquisitions

6. Monday, October 6, 2008 (Suite 324):
   Copyright
   
   NO CLASS ON OCTOBER 14: COLUMBUS DAY

7. Monday October 20, 2008:
   Processing, Preservation and Revolution of the Digital age
   Disaster Recovery/Continuity Planning

8. Monday, October 27, 2008:
   Circulation Control – Access management issues
   (n.b., Circulation control is included here because of systems considerations although the staffing of the circulation activities nearly always falls under the public services department of the library organization.

   Interlibrary Loan, Document Delivery, Resource Sharing

10. Monday, November 10, 2008:
    Acquisitions
11. **Monday, November 17, 2008:**

Serials and Serial Control

12. **Monday, November 24, 2008 (Suite 324):**

New Accountabilities. Project Management, Outcome Measures, and Evaluation Considerations

13. **Monday, December 1, 2008 (Suite 324):**

Finding the resources for change: Continuing education/Competency/Management Issues/Challenges/Resources for Technical Services

14. **Monday, December 8, 2008:**

Grants/partnerships/collaborations
COURSE INTRODUCTION

The term “technical services” became part of library terminology around 1939. It was and is used to describe the functional areas of library activities devoted to identifying, acquiring, and organizing access to library resources. The concept of technical services began as a convenient way of grouping together as an organizational unit those actions that normally took place sequentially and did not involve direct personal contact with library users. It did not, as we might now assume, imply a connection with technology, although today it is impossible to consider any library operations apart from technology. In 1939, the organizational concepts derived from industrial production models also prevailed in libraries, with a hierarchal pyramid structure of relatively stand alone units – far from the collaborative model in today’s organization.

In the past half century every element of every subsequent definition of “technical services” has changed: the library of 1939 was a fairly self-contained institution serving a geographically-bounded user group within a limited number of buildings through personal services and use of a print-based collection of resources. Librarians took the role of “gatekeepers” to cultural, literary, and other information resources. Today’s library, in contrast, may more properly be considered as an organization with four faces – or four “versions” – of a library:

- The “traditional” library, i.e., the print-based library. By definition, this library served/serves people who actually came to the library building. It is the image of our childhood associations with the word “library.” It is also the library of antiquity with scrolls or tablets. Knowing that collections of text are the fundamental historic foundation of libraries makes us immediately comfortable in ancient, medieval, or renaissance libraries – we are comfortable there and quickly determine the organizing principles that were used. It also makes some uncomfortable with the other four versions of today’s libraries because they are “intangible” and the organizing principles for their contents may not be so transparent. This discomfort, we will learn, is a characteristic of every evolution of the library content formats: when the codex form of the book was introduced in the third through fifth centuries, it was common practice to copy the texts onto scrolls, the “real” form for capturing literary expression in very much the same way as academic libraries in mid-twentieth century America shunned softcover books and many libraries today disdain graphic novels.

- The “digital” library, which I choose to define as the library resources, formerly print-based, now organized and made accessible digitally. Because of copyright laws, access to digital resources may be restricted to access within the library site in some cases and made available via networks in others. Google, for example, is building a digital library by this definition with its Books project, and that project is subject to many copyright issues that will be resolved in the courts. Most importantly, those yet-to-be-decided cases will also define “fair use” copyright interpretations for libraries at the same time.

- The “electronic” library, i.e., the library’s extended access to resources through databases and other network-delivered resources. Some of these resources may be representations of print-based resources; others may be sound, image, motion, etc. resources.

- The “virtual” library, which I choose to define as the library that has become transparent to the boundaries of time, space, and location – the “24/7” library available to users remotely, even globally. The virtual library is the most rapidly growing aspect of libraries today as the Internet, wireless access, and new communication technologies have transformed habits so that personal focus is interest based rather than geographically bound. By that I mean that
we are comfortable with the notion of “using” a library we may never bodily visit if its contents meet our interest needs. This class is based in large part on the ease with which you will use the virtual library. For instance, some of the reading assignments will “take” you to the Library of Congress, a place where easy access to and use of the physical “Reading Room” is severely limited.

The definition of “technical services” has evolved and expanded to encompass the activities that provide the infrastructure for all these faces of the single organizational entity in today’s library. Today’s support functions do not yet have a single universal term to describe them. No area of librarianship has evolved more rapidly than this. It has become complex, challenging, and exciting. Whatever we say about technical services today will be modified tomorrow. It is a “grand challenge” in the classic sense of that term.

Originally, this course was designed to provide a fundamental understanding of and competency in each of the functional areas as they were defined over 50 years ago: acquisitions, cataloging and processing, preservation, bindery operations, serials control, and maintenance of the “card” catalog ranked high. Today’s course is significantly expanded and focuses on the roles played by the support functions within the library – how resource management both shapes the library and is shaped by the library, its community of users, and ever-changing expectations.

The shape of the evolution of librarianship was eloquently summarized by Michael Keller, University Librarian, Stanford University, Director of Academic Information Resources, and Publisher of HighWirePress and the Stanford University Press:

Our fundamental role is indeed evolving, but it remains in basically six categories: selection; cataloging, indexing and abstracting; distribution; interpretation; preservation; and the newest one, supporting the extraction, analysis and presentation of the material. That is, how does one make an effective presentation? How does one help a student write and deliver a report that includes sounds and moving images? These six functions have remained largely unchanged, except for the last one, for decades if not centuries. It doesn’t really matter whether the collection consists of digital objects, physical objects, or some combination of the two.

In my view, in the next 10 or 20 years, more and more information will be coming to us in digital form. For reading, for viewing maps, for looking at art images and photographs, I suspect books will continue to be useful and important, and we’ll see them published. But people will find more and more of their information online and the number of books will decrease. For instance, we’re planning a science and engineering library here where our goal is to have no books on the shelves. We probably won’t have achieved that goal when we first open the doors, but as a planning proposition, we’re trying to imagine it.

At the same time, all indications are that we will still need physical libraries because people want to meet with one another. They want to work on projects collaboratively, and they also like to work in clusters and groups. So providing the opportunity for people to meet one another and to find information in a mediated way will continue to be important.

One important construct to recognize is that for the kinds of work done at this sort of place [the library] – study, research, teaching – the emphasis of what a library provides is not necessarily on the artifact. As it happens, before the Internet, before the Web, the information carriers were books and journals and documents printed on paper, or occasionally written on vellum, cuneiform tablets and
In this context, this class is designed to contribute to the following competencies for your attaining full professional status to the library setting of your choice:

- Use the basic concepts and principles relating to the creation, evaluation, selection, acquisition, preservation and organization of specific items or collections of information
- Understand the system of standards and methods used to control and create information structures and apply basic principles involved in the organization and representation of knowledge
- Understand how to evaluate information retrieval systems for a specific setting
- Understand the evolving nature of library services, resources, technologies and expectations

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