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## Technical Services Assessment in Pennsylvania Academic Libraries

Rebecca L. Mugridge

*University at Albany, State University of New York, [rmugridge@albany.edu](mailto:rmugridge@albany.edu)*

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# Technical Services Assessment in Pennsylvania Academic Libraries

Rebecca L. Mugridge  
University at Albany, SUNY  
American Library Association  
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# Why this topic?

- \* 2011 PaLA CRD Spring Workshop with Megan Oakleaf as keynote speaker
- \* *The Value of Academic Libraries: A Comprehensive Research Review and Report* (Chicago: Association of College and Research Libraries, 2010)
- \* There are 22 recommendations for next steps for librarians who wish to demonstrate value

# Recommendation: Mobilize library administrators (1)

- \* Communicating **assessment** needs and results to library stakeholders
- \* Using evidence-based decision making
- \* Creating confidence in library **assessment** efforts
- \* Dedicating **assessment** personnel and training

# Recommendation: Mobilize library administrators (2)

- \* Fostering environments that encourage creativity and risk taking
- \* Integrating library **assessment** within library planning, budget, and reward structures
- \* Ensuring that **assessment** efforts have requisite resources

# Why a focus on Technical Services?

- \* Technical services staff equal 20-30% of our total staff
- \* Very little published on technical services assessment
- \* Most articles that do address assessment in technical services have to do with assessing *specific processes*
- \* Interested in a broader approach to technical services assessment

# Why Pennsylvania academic libraries?

- \* It's a large group (over 120 libraries) and I thought it would provide useful, generalizable results
- \* These libraries might be inherently interested in the results, and therefore likely to participate
- \* Research and presentation was originally planned for a PaLA College and Research Division program

# Survey proposal

- \* Survey the academic libraries in Pennsylvania to determine:
  - \* **Whether** they conducted assessment of technical services
  - \* **How** they conducted assessment
  - \* **How** they shared the results of their assessment activities
  - \* **What** actions they took based on their assessment activities



# Technical Services

For the purposes of the survey, technical services is defined as units responsible for:

- \* Cataloging/Metadata
- \* Acquisitions
- \* Electronic resources management
- \* Preservation/Bindery/Physical processing

# Academic libraries in Pennsylvania

Downloaded a list of academic libraries from this Pennsylvania Department of Education website:

<http://www.libdir.ed.state.pa.us/screens/wfDownload.aspx>

Included names of institution, library, director, and phone numbers. **It did not include email addresses!**

# Academic libraries in Pennsylvania, cont'd

- \* Organized alphabetically
- \* Deleted duplicates and those without “college” or “university” in name of institution
- \* Updated director names (list was not completely up-to-date)
- \* Added email addresses (with help)
- \* Resulted in 129 academic libraries, but couldn't find email addresses for nine of them
- \* End result: 120 libraries were survey candidates

# Demographics

- \* 63 responding libraries (53% response rate)
  - \* 16 Public (25%)
  - \* 47 Private (75%)
- \* Average total employees: 13 librarians, 17 staff
- \* Average total technical services employees: 2 librarians, 4 staff

# Does your library conduct assessment of technical services?

- \* Original responses:
  - \* Yes: 36 libraries (60%)
  - \* No: 24 libraries (40%)
- \* Adjusted responses based on answers to following question:
  - \* Yes: 57 libraries (90%)
  - \* No: 6 libraries (10%)

# Specific assessment methods

- \* Gather statistics (84%)
- \* Gather usage data (49%)
- \* Gather input from non-technical services librarians (44%)
- \* Collect anecdotes or feedback from customers (30%)
- \* Conduct customer service surveys (25%)

# Specific assessment methods, cont'd

- \* Benchmark with other institutions (19%)
- \* Anonymous suggestion box (13%)
- \* Conduct focus groups (10%)
- \* Others included:
  - \* ROI studies of specific Technical Services functions
  - \* Time studies
  - \* Baldrige Assessment Process/360 Review
  - \* LibQUAL

# Goals of technical services assessment

- \* Improve or streamline processes (68%)
- \* Improve services (63%)
- \* Make better decisions (62%)
- \* Inform strategic planning activities (55%)
- \* Explore offering new services (40%)
- \* Reallocate staff or other services (30%)
- \* Compare with other institutions (22%)



# Goals of technical services assessment, cont'd

- \* Other:
  - \* Build better collections
  - \* Identifying activities or services that could be eliminated
  - \* Establish best practices based on national standards
  - \* Demonstrate value of technical services to the university and libraries
  - \* Demonstrate value to scholarship and research of original cataloging

# Technical Services units assessed within the past five years

- \* Cataloging/Metadata (56%)
- \* Acquisitions (56%)
- \* Electronic resources management (45%)
- \* Preservation/Bindery/Physical processing (26%)

# Primary responsibility for conducting assessment

- \* Library director/Dean/University librarian (38%)
- \* Division head (20%)
- \* Department head(s) (14%)
- \* Unit head(s) (7%)
- \* Committee (5%)
- \* Single librarian (4%)

# Primary responsibility for conducting assessment

- \* Other:
  - \* Department responsible for assessment, but is also done at division, department, and unit level
  - \* Department and unit heads
  - \* Director, associate director, and staff
  - \* Library administrative team
  - \* Director and committee

# How do you report the results of technical services assessment?

- \* Annual report (61%)
- \* Informational report to library administration (52%)
- \* Mass email to library employees (11%)
- \* Library newsletter article (8%)
- \* Presentations (8%)
- \* Web site (5%)
- \* Campus newsletter article (2%)

# How do you report the results of technical services assessment?

- \* Other:
  - \* Assessment report
  - \* 5-year audit report
  - \* Department outcome assessment reports
  - \* Report to Provost
  - \* Internal discussions
  - \* Performance evaluations

# Outcomes reported

- \* 35 responses
- \* Themes:
  - \* Streamlining processes
  - \* Staff reallocation
  - \* Changed vendors/Changed vendor services
  - \* Collection decisions
  - \* Training
  - \* Communication
  - \* New services
  - \* Changed ILSs

# Outcomes reported, cont'd

## Example:

- a. In past several years, implemented several staff reorganizations, job reassessments or upgrades, and adjustments to workflow.
- b. Streamlined work processes & procedures, developed training manuals and adapted policies to achieve financial and personnel efficiencies.
- c. Added several new services for faculty, such as new publications email notification, new book display shelves, and improved book order/request system



# Questions?

Contact information:

**Rebecca L. Mugridge**

Associate Director for Technical Services and Library Systems

University Libraries LI-B34E

1400 Washington Ave.

Albany, NY 12222

[rmugridge@albany.edu](mailto:rmugridge@albany.edu)

518-442-3631