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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

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Why this topic?

- 2011 PaLA CRD Spring Workshop with Megan Oakleaf as keynote speaker
- 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
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.asp

Included names of institution, library, director, and phone numbers. *It did not include email addresses!*
* 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
* 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
518-442-3631