



# Strategic Planning Report: Technical Services Division

| submitted by William Schlaack | | April 5, 2019

**I** ILLINOIS LIBRARY

## Introduction

*Overview of the division and the population(s) served (text and/or data).*

The Technical Services Division (TSD) is comprised of three distinct yet cooperative member units: Collection Management Services (CMS), Preservation, Conservation, and Digitization Services (Preservation Services), and the newly formed Acquisitions & Cataloging Services (ACS). As outlined on the Technical Services Division website “[s]taff in the Technical Services Division (TSD) are responsible for acquiring, organizing, preserving, and providing access to materials in all formats for the library’s collections in support of the University of Illinois library’s mission to enhance the University’s activities in creating knowledge, preparing students for lives of impact, and addressing critical societal needs.”<sup>1</sup> CMS oversees much of the behind the scenes collection–management related tasks required by the University Library system, ranging from physical shifts and transfers of collections to massive cataloging projects. In addition to this, CMS also processes gifts, supports deduplication efforts, and assists with two massive consortia–based projects: the Big Ten Academic Alliance’s (BTAA) Shared Print Repository, and the Google Books Search Project. CMS acts as the prime overseer for the Oak Street Library Facility (OSLF), helping to manage a collection of over four million holdings. The tasks carried out by CMS faculty and staff enhance access and discoverability of the library’s ever burgeoning physical collections. This work is instrumental to the upcoming renovation and building projects, which will undoubtedly require CMS to be fully staffed and supported during this transitional process. One recent change in the division is the merger of two Content Access Management and Acquisitions, thus creating Acquisitions & Cataloging Services (ACS). This merger between acquisitions and cataloging

---

<sup>1</sup> <https://www.library.illinois.edu/staff/division/technical-services-division/> accessed 3/23/2019

provides an opportunity to build a new organization structure based on existing expertise and workflows. As the nature of collections changes the role of ACS continues to meet the needs of patrons through adaptation of existing knowledge, revision of workflows, and training of staff. ACS will undoubtedly play a central role in the upcoming library building project as metadata projects arise and acquisitions needs shift with the rearrangement of collections. Preservation Services are split across two physical locations (Preservation and Digitization Services located in Main Library while Conservation resides in OSLF) and staff serve collections ranging from general to rare, physical and digital. Various labs (media, born-digital, digitization, and conservation) serve to meet the needs of library staff and patrons alike. As with the aforementioned units of TSD Preservation Services will also be at the forefront of the coming changes to the Library. With the need for disaster management planning, environmental monitoring, and anticipated increase in required conservation treatments for shifting collections Preservation Services will play a prominent role in future strategic decisions. Despite the nature of our division being to serve to other library divisions, many units nonetheless engage in public outreach efforts geared towards colleagues across campus as well as patrons. CMS for example provided 22 tours to 212 guests during FY18, and the Preservation Unit granted eight organized tours, coupled with dozens of infrequent visits. This goes to demonstrate that the division seeks to increase visibility to the public as well as to library staff.

## Strengths

*What is the division's greatest strengths?*

- **Technical expertise of staff** – Collection managers from across various libraries come to us as a division to resolve questions concerning collections (e.g. cataloging, preservation treatments, etc.). Our staff possess a great balance of institutional memory as well as an understanding of new standards or technical skills for our respective units. Prime examples of this include ACS taking on the implementation of Alma, a new integrated library system (ILS) from Ex Libris, CMS overseeing inter-institutional shared print repository development, and the Preservation Unit expanding and updating their labs (media, born-digital, reformatting, digitization services, and conservation) to meet changing demands. Many staff have specialized knowledge in their respective areas, including accounting, records management, advanced conservation treatment practices, creating disaster planning and management plans, as well as metadata standards and tools (RDA, MARC, NACO, LCSH, among others).
- **Diversity of staff** – Without a diverse staff as TSD has it is doubtful we would have such an incredible wide-array of expertise. Thanks to the diversity found within our division we are much better able to serve in our support role. Concrete examples like the wide range of language expertise enables better quality acquisitions and cataloging.
- **Unique position as a support element** – Our main function is to serve all libraries and provide oversight for all collections. As such the TSD is able to see collections more holistically.

We feel one of our strengths is the ability to play a role for all collection managers, no matter the collection type or condition.

- **Commitment to collaboration and innovation** – Our unit participates in many state, regional, national, and global initiatives that improve our standing among other peer institutions and enhance collection access for patrons on campus and beyond. Some concrete examples of these are the previously mentioned inter-institutional efforts that demonstrate a strong commitment to cooperative initiatives such as the Big Ten Academic Alliance (BTAA) Shared Print Repository, Google Book Search Project, and Cooperative Cataloging Partnership. The contributions made by cataloging through OCLC records and the role played by Preservation Services with other institutions through partnerships like HathiTrust further illustrate this strength.

## Opportunities (and Challenges)

*What are the greatest opportunities for your division and challenges in the next 1–3 years? In the next 3–7 years? Beyond 7 years?*

Many opportunities and challenges for TSD revolve around the changing presence of the physical library, but also the changing belief and need for continued engagement as the library becomes less of a place in the traditional library sense of a physical footprint and more of a service in terms of providing oversight for increasing amounts of born-digital content. The library building plan should rise to update the role of the Main Library and changing special collections areas to meet this demand. Our holistic understanding of collections places us in a unique role to see the overall impact of the library building on both physical and digital content. Successful implementation of the building must take into consideration all areas TSD serves, ranging from mass content shifts with CMS, cataloging updates through ACS, and preservation and conservation treatments through Preservation Services. The new library building should take this into consideration as an opportunity to enable TDS to fulfill their stated mission and provide the changing nature and level of services.

- **Short term (1–3 years)** – One of the most pressing and immediate opportunities of TSD is the previously discussed merger of our content access management and acquisitions units. During this time the unit has the ability to better integrate pre-existing cooperative workflows and strengthen knowledge sharing across similar areas. This transition presents the possibility to capitalize on resources and shared connections promoting a holistic vision of library infrastructure. An additional opportunity (and challenge during this time is to expand research data services and accompanying education initiatives, focusing on data curation, use, and dissemination, especially regarding born-digital content. Managing scholarly resources (born-digital). Throughout this short term time period TSD should conduct assessment and analytics in order to provide evidence of success throughout or unit as we prepare for the library building project to commence.

- **Medium term (3–7 years)** – During this time the library building project will be at the forefront of our opportunities for changing technical services (and therefore the library) for the better. Safeguarding collections through sound preservation decisions, updated cataloging practices, forward-thinking acquisitions policies, and stewardship of physical collections by making continued efficient use of facilities like OSLF allow the library to make the most out of the building project. If this is to be successful support must come from the administration to ensure TSD is playing an active and respected role in this transitional time.
- **Long term (7+ years)** – Long term needs center around the continued requirement of support for cross-training efforts and keeping abreast of continued changes in our respective fields of expertise. As other units across campus grow and develop there exists a large amount of opportunity for collaboration between the Library and other collection holders across campus (e.g. museums). This would help foster and expand a campus-wide understanding of stewardship of collections.

## Aspirations

*What does your division aspire to be?*

To paraphrase one staff member from ACS the division as a whole aspires to continue our incredible output while seeking innovative approaches to approaching challenges go hand in hand within an atmosphere of collaboration and collegiality; a workplace where strong work ethic, expertise, and contributions to the unit and thus library are recognized and rewarded. All points listed in our aspirations are geared toward division wide commitment to innovation and positive change. All of these points of aspiration require significant buy-in from library administration in order to be successful. Support from the administration must meet demand coming from the users of our services.

- **A division that recognizes, fosters, and promotes success** – We want to be a division that ensures success (both individual, as well as unit and division driven) is recognized by both library staff and users.
- **A division that promotes and support the staffing changes and growth required to maintain and expand services as needed** – First and foremost this includes a focus on recruiting, hiring, training of new staff, in addition to promoting retention of current staff to ensure minimal turnover. One aspect of such is to promote a vibrant and dynamic organizational culture and structure that is supportive of and benefits from diversity and inclusion.
- **A division that increases collaboration, but one that avoids the pitfalls of meeting fatigue** Building trust with other units to ensure this responsiveness (understanding needs and tasks better), however we aspire to find a way in which building better channels of trust avoid the traditional approaches (e.g. meetings) but rather focusing on what we do as services. Much of this

requires a culture shift in the library in which TSD staff are recognized for their expertise. In addition, there is a general desire for a common platform and technique for project management and communications. Library administration should seek efforts to facilitate greater collaboration without at the same time encouraging more meetings for staff. The library should articulate a desire for divisions to quickly respond to changing needs. The culture of meetings sometimes hampers growth in a division where the requirements for services can change quickly. Possible solutions to this include the establishment of expert lists for our division so that others will know whom to contact based on their needs. In addition, ensuring that TSD (as with other divisions) are represented on appropriate and relevant committees and working groups to contribute the unique views of TSD staff.

## Results

*How can your division contribute to advancing the university's new strategic plan?*

Access to an unprecedented plethora of printed and electronic materials is a one of the cornerstones of experiencing first-class university education. Making these materials easy to locate facilitates research, spurring on breakthroughs in scholarship. A strong library collection is one of the primary magnets for recruiting academic talent both at the student and faculty levels; investing in the library collection and its stewardship is an investment in the future of the university.

- **Scholarship, discovery, and innovation** – As a division we are extremely vested in all aspects of this goal. Examples include catalog reclamation, the integration of a new ILS, new and updated OSLF inventory software and procedures, cutting-edge digitization, reformatting, and conservation workflows. All units maintain robust statistical reports which can be found on their respective annual reports.<sup>2</sup>
- **Transformative learning experiences** – TSD provides unique and transformative learning opportunities directly through graduate assistantships and graduate hourly positions. The continued relationship between the University's iSchool and TSD is essential to maintain our current service level but also to provide experience for future professionals in our field.
- **Societal impact** – Given that the University Library at Illinois is a state institution our goal should be to serve not only the campus community but also the people of Illinois (and beyond). The stewardship of the collection provided and fostered by the division is vital in the continued benefit of the resources that the library provides. Outside of this, the possibility of taking on greater leadership with digital library initiatives within the state of Illinois is another avenue of societal impact. All efforts to extend beyond current levels of work must be met with funding and institutional support.

---

<sup>2</sup> Many of which are located here: <https://www.library.illinois.edu/staff/administration/services/annualreports/>

- **Resources and strategic investment** – Given that the University Library at Illinois is a state institution our goal should be to serve not only the campus community but also the people of Illinois (and beyond). The stewardship of the collection provided and fostered by the division is vital in the continued benefit of the resources that the library provides.

## Appendix: Current Strategic Plan Elements to Retain

Through a unit-wide meeting and discussion Mary Laskowski, current head of TSD highlighted points from the current Framework for Strategic Action that are most pertinent and still relevant for the Technical Services Division:

2. Ensure an integrated and coherent user experience of library services focused on user success in information retrieval and use.
  - Optimize **discovery of, access to, and accessibility of** all library resources, collections, and services.
  - Systematize **access to library experts** and increase internal and external collaborations, including mechanisms for user requests for assistance and instructional support.
  
4. Capitalize on the University Library's national and international leadership to strengthen the research library ecosystem.
  - Lead regional and national efforts to **shape cooperative collections and related services.**
  - Expand access to **unique collections and resources.**
  - **Leverage international engagement** to develop unique collections, services, and partnerships that support the University's globalization efforts.

One major point to consider adding in any update is language that includes the ever-increasing role born-digital collections play on discovery, access, accessibility, and in shaping our collections and services. The changing role of such collections greatly impact all services across TSD.

The text above is the result of collaborative efforts from across the division in the form of two division-wide meetings as well as numerous emails and discussions within each unit. As the author I made a good faith effort to synthesize the incredible input provided by members of TSD.