

Moving From Print-Centric to e-Centric Workflows: A Reorganization of the Technical Services Group at Mason Libraries

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Overview

Introduction to Mason
Impetus for the Reorganization
Reorganization Process
New Structure
Impact

George Mason University Libraries

- Northern Virginia
- Distributed library system with 4 library buildings on 3 campuses
- VIVA member
- WRLC member
 - Consortial catalog
 - Mason (local) catalog



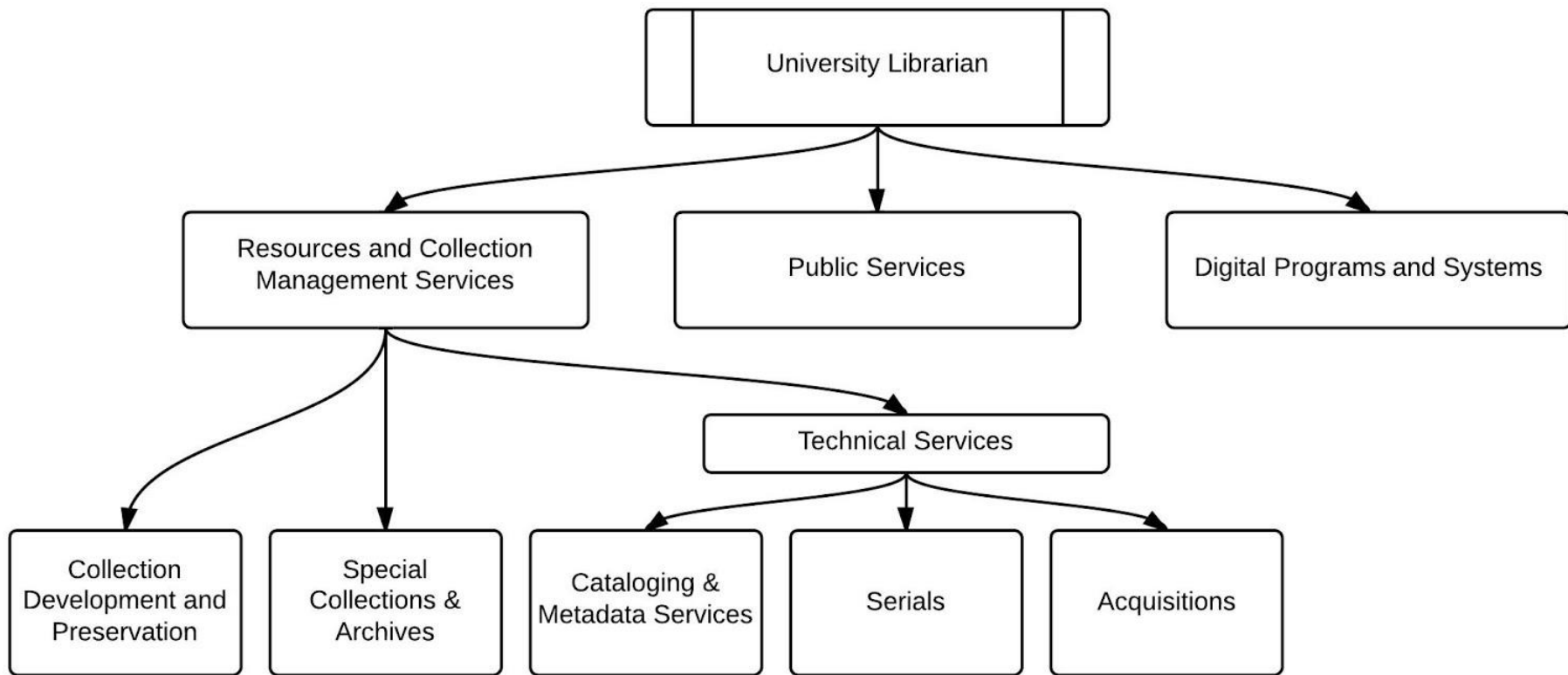
Fenwick Library, Fairfax Campus

George Mason University Libraries

- Centralized Technical Services for all 3 campuses
- 1.4+ million print volumes
- ~1 million eresources
- ~130 librarians and staff



George Mason, Arlington Campus



2010 Library Organization

2009 Technical Services Group

Director, Technical Services

Acquisitions

1 department head, 6 staff

Ordering, payments, receiving, gifts

Cataloging & Metadata Services

1 department head, 3 librarians, 6 staff

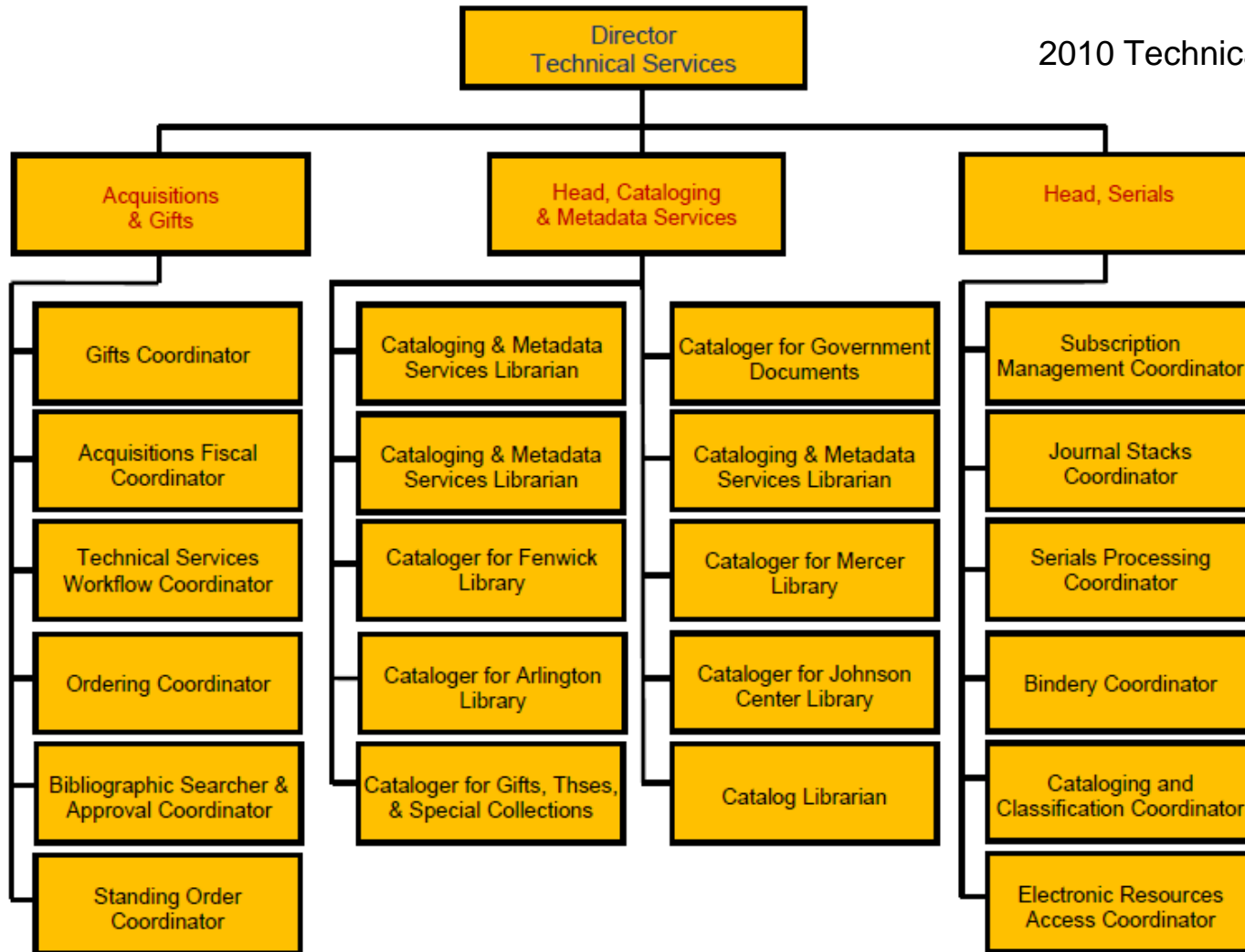
Cataloging, processing, database management

Serials

1 department head, 6 staff

Subscription management, processing, bindery

2010 Technical Services



Impetus for Change

- 1999 Task Force
- 2007 Self Study

- Timeline: May 2010 - January 2012

Task Force Charge (May 2010)

We are currently at a time when Technical Services departments are undergoing major changes related to an increased number of services available for purchase, as well as the explosion in the availability of electronic content and the related effects on workflows related to the print collections.

Task Force for the Reorganization

- Membership
 - Librarians and staff
 - Within and outside of Technical Services
- Conduct a lit review
- Map Technical Services workflows
- Talk to focus groups
- Conduct surveys

Task Force Membership

Technical Services

Director, Technical Services (chair)

Head, Serials

Head, Cataloging & Metadata Svcs

Cataloger for Arlington Library

Acquisitions Fiscal Coordinator

Outside Technical Services

Head, Systems

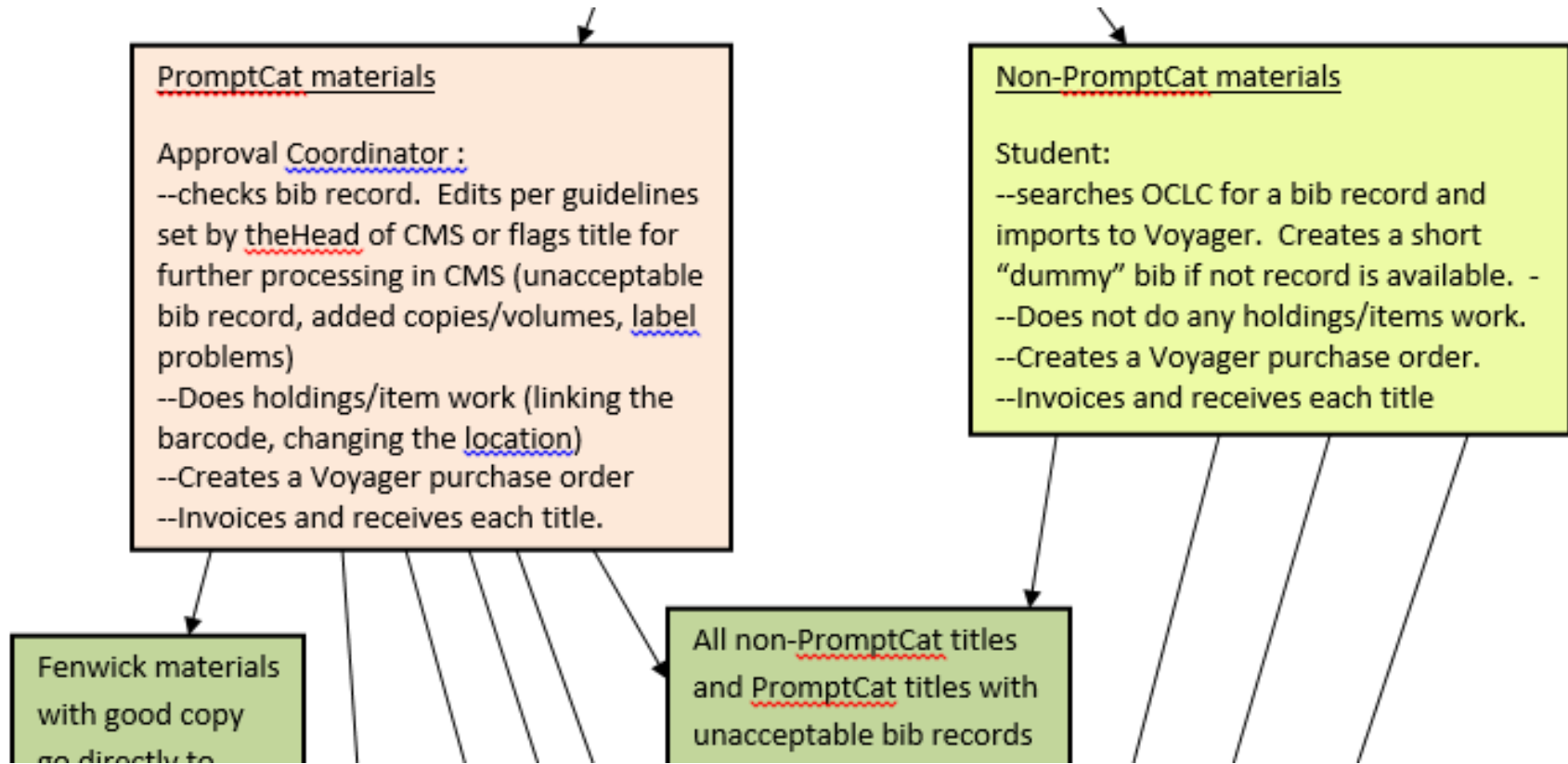
Head, Johnson Center Library

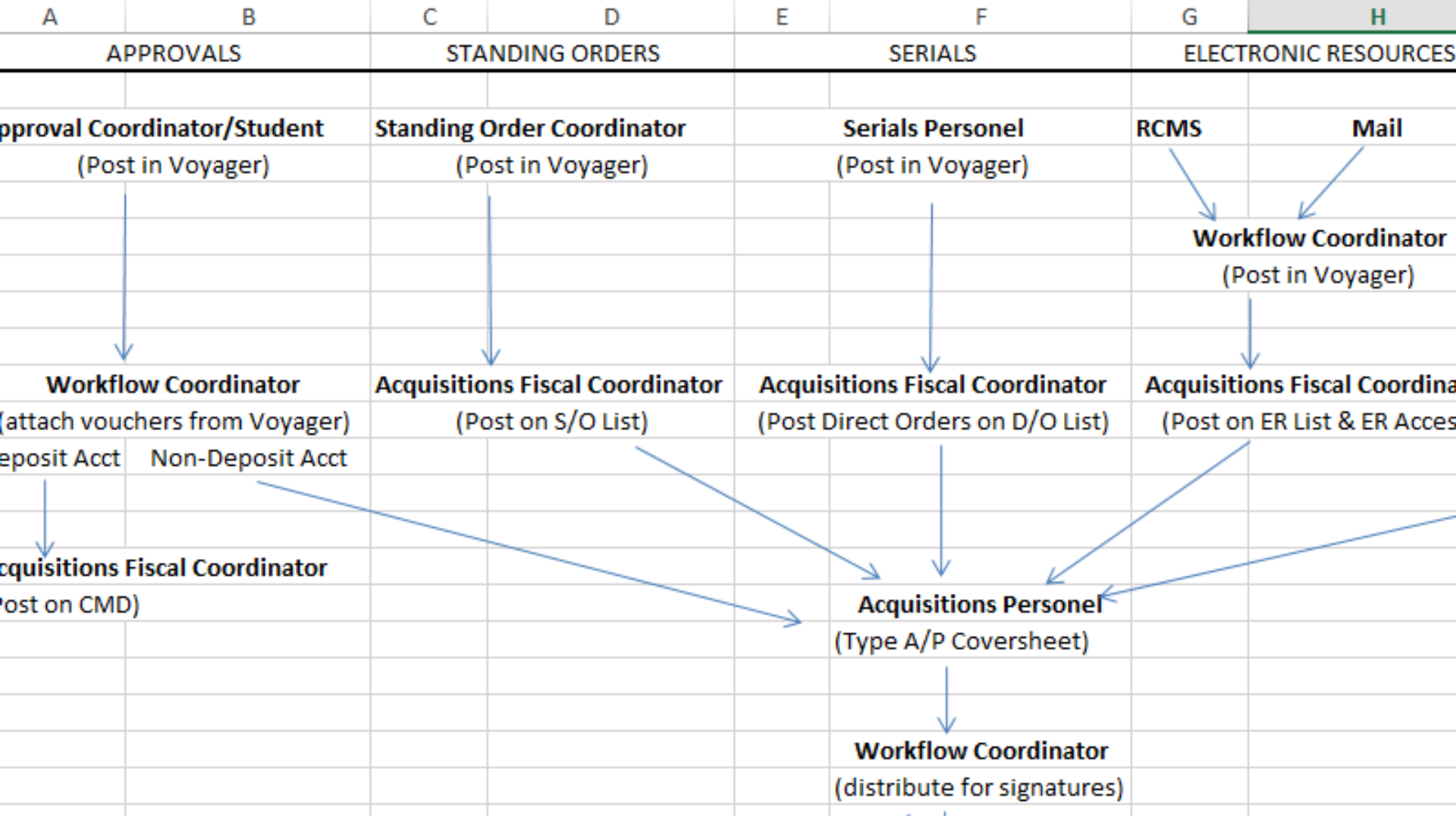
Eresources Librarian

ILL Coordinator

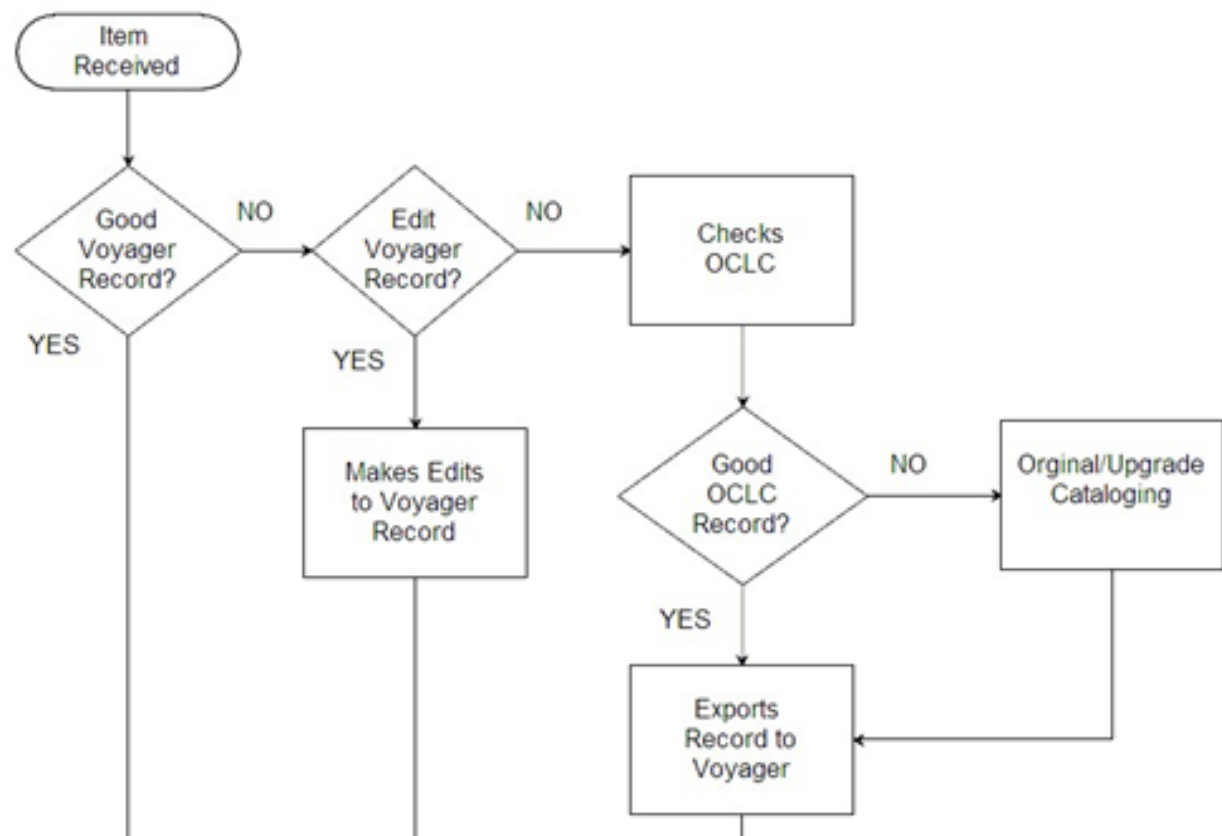
Engineering Liaison Librarian

Analyzing Current Workflows





Cataloging an Item

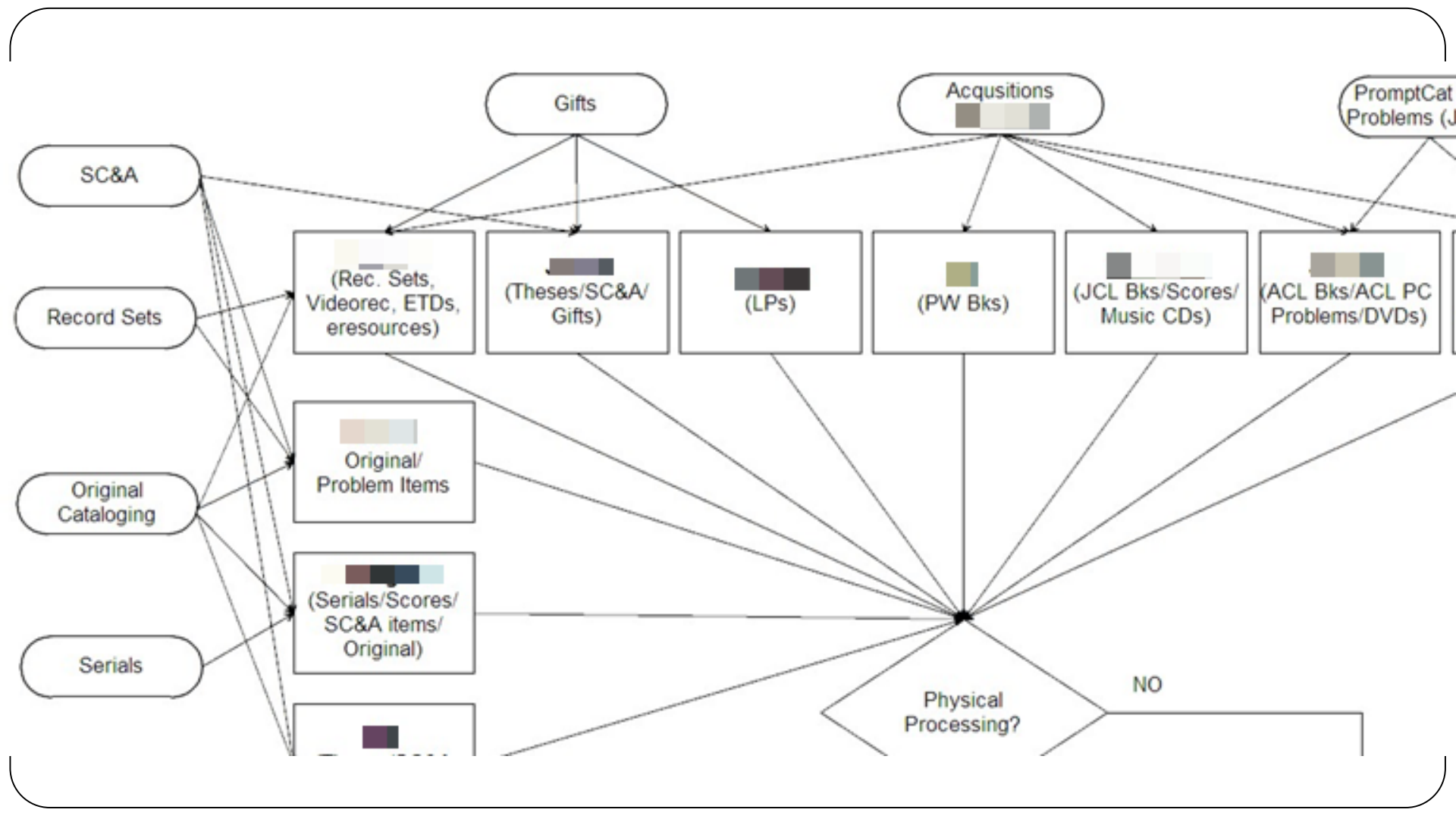


Copy Cataloging—comparing a screen to a bibliographic record and making changes to the record. Minor editing

- Adjusting the cutter to fit the
- Editing spelling or grammatic
- Overlaying an existing Voyager (without editing)
- Removing unnecessary fields (etc.)
- Adding a local field (e.g. gift or locally assigned subjects, etc.)

Upgrade Cataloging—comparing a screen to a bibliographic record and making changes to the record to provide a master record in OCLC. Substantial

- Adding an LC call no. not on
- Adding subject headings



Focus Groups & Surveys

- Internal to Technical Services
- External to EVERYONE in the Library

Sample Questions for TSG

- Are there some problems or issues in TSG that you think a reorganization could address?
- If you could have one thing NOT change in a reorganization, what would it be?
- If you could have one thing that definitely DOES change in a reorganization, what would it be?
- Are there strengths or weaknesses that you have, or your department has, that should be taken into consideration when planning the reorganization?

Sample Questions for the Library

- How do you interact with Technical Services, or do you? What brings you to Technical Services?
- Do you know what TSG does (and does not) do?
- What do you like about your interactions with TSG?
- What do you not like about your interactions with TSG?
- What do you wish were different?
- Are there things you wish TSG could or would do?

Study Results/Reorganization Goals

- Prioritize processing of electronic over print
- Communicate more effectively across TSG and CDP for e- resources
- Eliminate chronic backlogs in non-book cataloging (e-books, DVDs, theses, ETDs)
- Create an electronic ordering workflow
- Maintain audit-required separation between ordering, receiving, invoicing

Study Results/Reorganization Goals

- Distribute workload evenly among staff
- Minimize slow times and “crunch” times due to Acquisitions calendar
- Expand ability to absorb catalog management projects
- Create flexible department structure

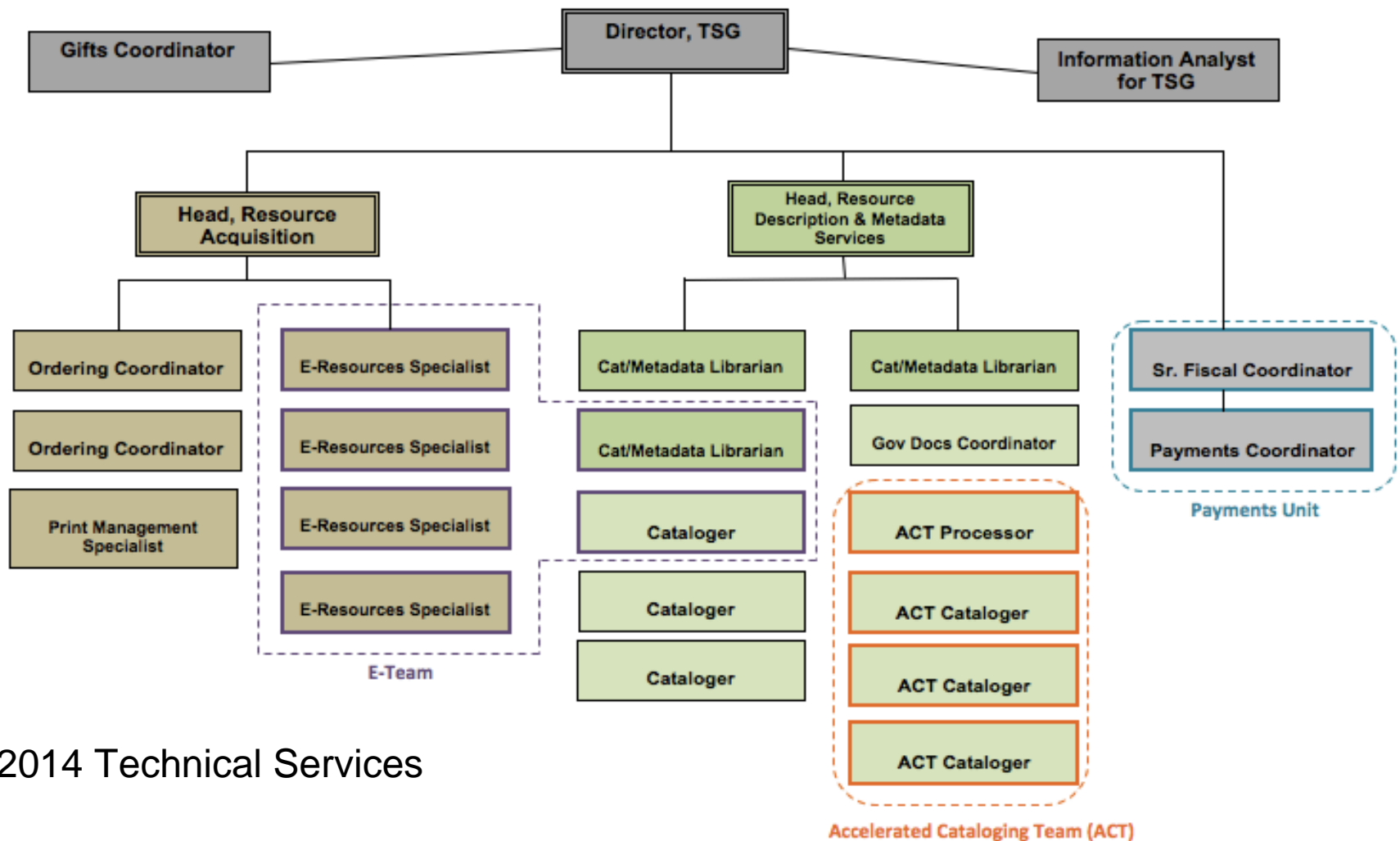
Key Components of New Structure

- Information Analyst for Technical Services
- New & Broader Job Descriptions
- Team Structure

Information Analyst for TSG

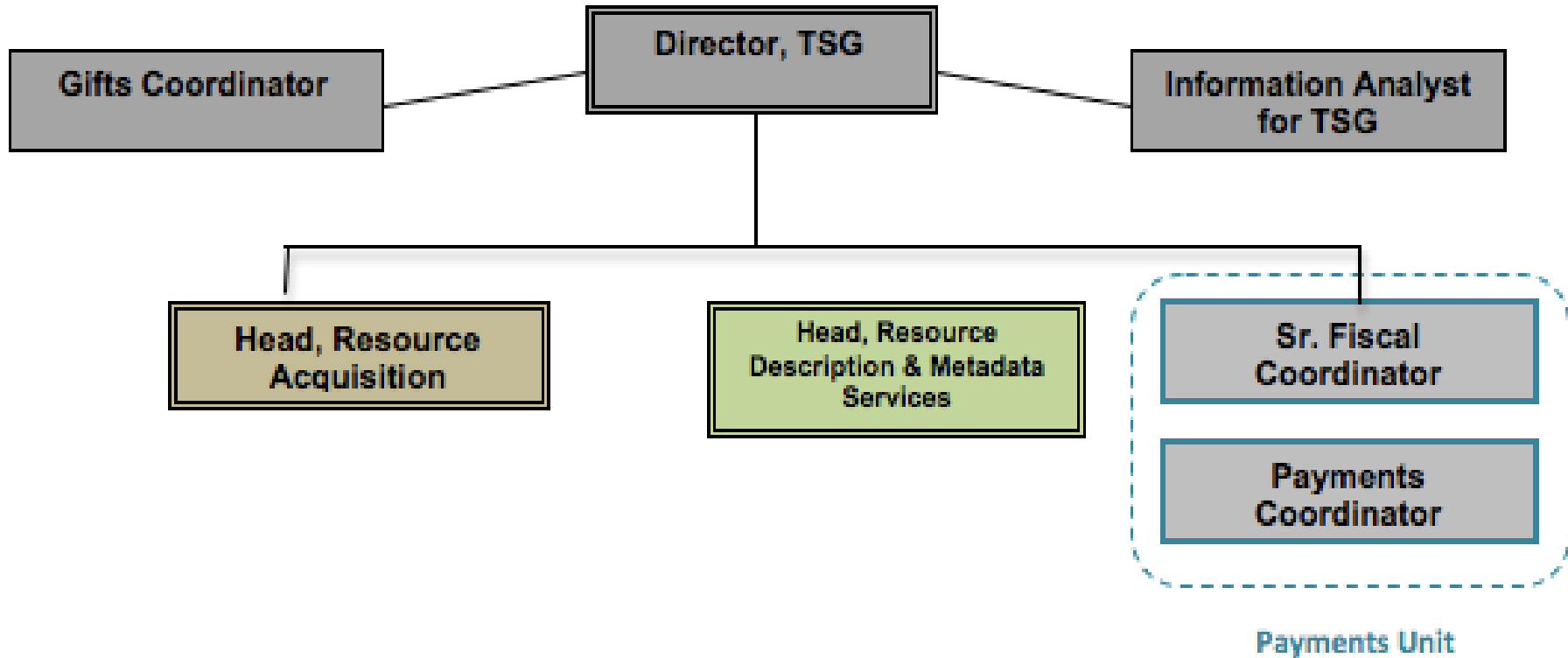
This position will:

- Help staff think through what they need from the various library information systems
- Determine functional requirements
- Work with the dedicated Systems Group team to fulfill those needs



2014 Technical Services

Accelerated Cataloging Team (ACT)



Director, TSG

**Head, Resource
Acquisition**

Ordering Coordinator

E-Resources Specialist

E-Resources Specialist

Ordering Coordinator

E-Resources Specialist

E-Resources Specialist

**Print Management
Specialist**

Director, TSG

**Head, Resource
Description & Metadata
Services**

Cataloger

Cat/Metadata Librarian

Gov Docs Coordinator

ACT Cataloger

Cataloger

Cat/Metadata Librarian

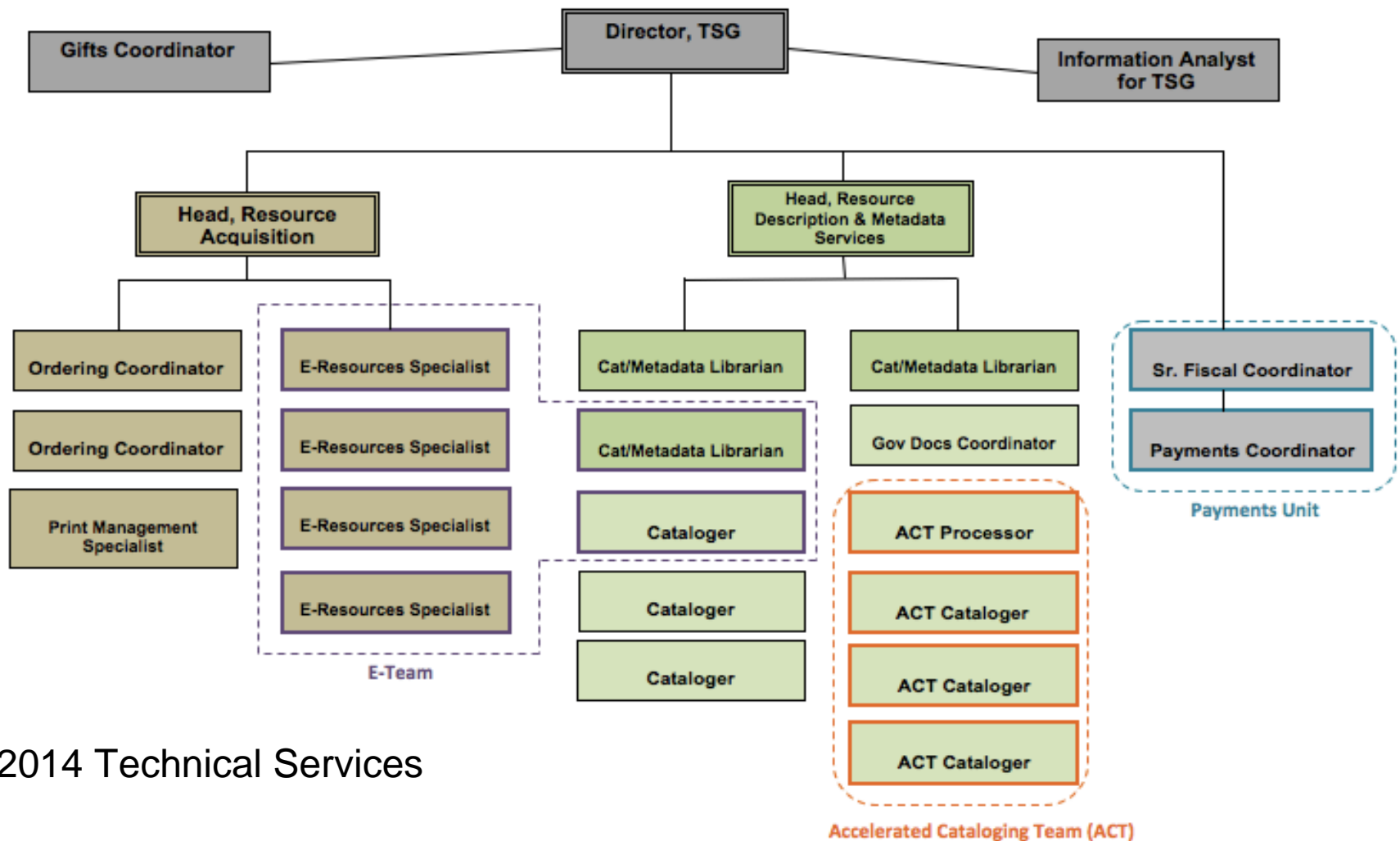
ACT Processor

ACT Cataloger

Cataloger

Cat/Metadata Librarian

ACT Cataloger



2014 Technical Services

Accelerated Cataloging Team (ACT)

Preparation for New Responsibilities

- Competencies Matrix
- Creating and drafting new Job Descriptions
- Desk audits
- TSG department & one-on-one meetings
- Support for TSG Managers
- Working with HR to discuss implementation plan

Competency	How to acquire?	Resource Acquisition	
		Position	Staff Person
		E-Resources Specialist	Name
Tools			
--Searching, knowledge of different indexes --Record structure (bib, holdings, items, orders, checkin) --Acq: EDI loading, using Acquisitions (POs, invoices, funds, subscriptions,	E.g. Series of three training sessions led by TSG Managers. At end of trainings, staff will be able to complete short exercises demonstrating competency.	Y -Comprehensive knowledge (how to order (firm, s.o, subscription), receive; reading invoices, funds)	Understands serial orders, but not monographs. No invoice, fund knowledge
Voyager-Cataloging Module --Record structure (bib, holdings, items, orders) --Searching, knowledge of different indexes		Y -Basic structure -How to read a MARC record -Importing records	Not at all familiar with Cat module; minimal knowledge of MARC records
Voyager-Circulation Module --Searching, knowledge of different indexes		N	
Connexion --Using the software (best practices for navigation, etc.)	--In-house training by Head of Cataloging --OCLC-created tutorials (online)	N	

Training Plan for Staff

		Sheets	Charts	SmartArt Graphics	WordArt
	A	B	C	D	E
1		Lisa		Ginger	
2	Learn	<u>Tasks/Concepts</u> Supervision skills	<u>Learn from:</u> HR Classes Mtgs w TSG Director Mtgs w Head, Employee Relations	<u>Tasks/Concepts</u> Serials ordering, including publication patterns Returning print books	<u>Learn from:</u> Hope Lisa
3					
4		Teach	<u>Tasks/Concepts</u> Creating purchase orders for databases and e-books Placing orders for databases and e-books directly with publishers Updating the ER12 spreadsheet Returning print books	<u>To Teach to:</u> Hope, Ruth, Tran Hope, Ruth, Tran Hope, Ruth, Tran Ginger & Renee	<u>Tasks/Concepts</u> Monograph ordering (creating purchase orders, using GOBI, vrending, out of print/hard to find materials, media)
5					
6					

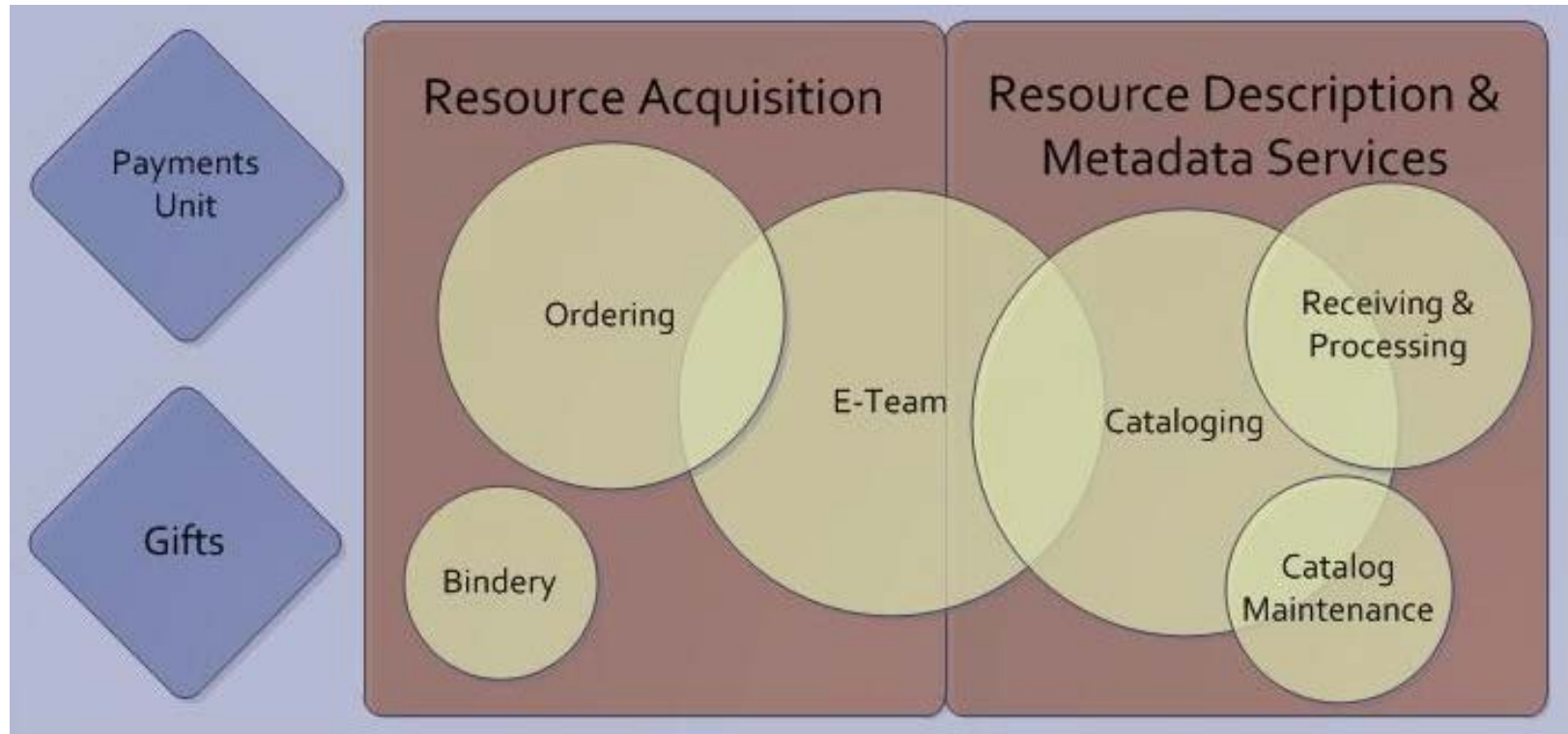
Training Calendar

- May 2012 -						
	Mon	Tue	Wed	Thu	Fri	
		1	2	3 TODAY	4 10am	5
7 9am	8 10am: Order Training #1 (Voyager) 2pm	9 9am	10 1pm	11 9am	12	
14 9am	15 11am	16 9am E-Resources Training #1	17 1pm	18 9am	19	
21 TBD	22 Tentative: Order Training #2 (Voyager & OCLC)	23 TBD	24 1pm E-Resources Training #2	25 TBD	26	
28	29	30	31	Notes:		

Since 2012

- Additional RDMS staff on E-Team
- Record set loading
- Ordering Coordinator doing streaming licensing
- RDMS ACT Coordinator
- Expanded role for Information Analyst

Technical Services Group



Thank you!

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