Chapter 8: Partnering for Change: Collaboration Between Acquisitions and Cataloging at the University of Maryland Libraries

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CHAPTER 8

Partnering for Change: Collaboration Between Acquisitions and Cataloging at the University of Maryland Libraries

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INTRODUCTION

As the largest university library system in the Washington, D.C.–Baltimore area, the University of Maryland Libraries serves 37,000 faculty and students at the flagship campus located in College Park, Maryland. Comprised of one main library with seven branch library locations, UMD Libraries has an operating budget of nearly $29 million, including a collections budget of $12.3 million, and is ranked 40th among the 115 members of the Association of Research Libraries and 10th in electronic resources as a percentage of total library materials. With 4.75 million books, the UMD Libraries’ growing e-book collections now number 1.2 million volumes, a quarter of its book collection. Combined with its almost entirely electronic journal and database collections worth $10.5 million per year, the UMD Libraries has invested heavily in electronic resources.

The UMD Libraries is active in three library consortia: the Big Ten Academic Alliance (BTAA), the NorthEast Research Libraries (NERL), and the University System of Maryland and Affiliated Institutions (USMAI). The 17 USMAI member libraries have a long tradition of resource sharing as well as a common integrated library system, with College Park playing a leadership role for many years in the group’s cooperative electronic resource purchasing program as well as coordinating the business contracts for major book and serial vendors for the
group. While College Park may be the largest of the USMAI libraries, its staff is relatively small given its collection size when compared to other NERL or BTAA libraries. The investment in electronic resources combined with a lean staff have over time produced an environment in which the UMD Libraries has pointedly embraced operational efficiencies and economies of scale that would allow the Libraries’ excellent staff to work collaboratively and collectively toward the same goal: to seamlessly and efficiently connect the user to the world of knowledge.

This chapter discusses the evolving relationship between the Acquisitions and Metadata Services (also referred to as cataloging) units at the UMD Libraries and the influence their relationship has had on the reorganization of traditional technical services. As the work surrounding resource management has steadily shifted from print-centric to electronic-based resources, the need for collaboration between acquisitions and cataloging units becomes vital. Over the course of many years, the Acquisitions and Metadata Services units at UMD Libraries have pursued twin strategies for coping with the magnitude of this shift. Both units worked to share the management of electronic resources throughout the organization, sharing expertise and workflows with other units responsible for the management of those resources, eventually creating shared workflows for the work done in the OCLC WorldCat knowledge base to manage the e-resource content.

As the UMD Libraries pursued the final implementation of its discovery catalog, WorldCat Discovery, the Acquisitions and Metadata Services units quickly realized core gaps in both staffing and skills, notably in the areas of discovery, e-resource management, and non-traditional metadata. With the departure of the head of Metadata Services, UMD Libraries took the opportunity to rethink its technical services operations, creating a new structure, Collection Services, which would build on existing strengths while also allowing opportunity for growth where it was needed most. The new unit is comprised of four departments—Acquisitions and Data Services, Continuing Resources and Help Desk, Discovery and Metadata, and Original and Special Collections Cataloging—each representing a unique combination of expertise to ensure an efficient path for making resources visible and accessible to users.
LITERATURE REVIEW

Cooperation between acquisitions and cataloging departments is long established and has been primarily anchored in workflows for pre-order cataloging and cataloging at the point of order. Departments learned that they could be more efficient if they worked collaboratively and consolidated their workflows. This trend toward developing workflow efficiencies, such as reducing the number of times a cart of materials gets moved around within and between departments, or the number of times a book changes hands, continues to drive how technical services frame their work. The complementary relationship between cataloging and acquisitions has at times resulted in an integration of acquisitions and cataloging units, as at The University of Southern Mississippi, or in the relocation and cross-training of staff to better accommodate the new tasks and workflows, as at Penn State University Libraries. Such transformations resulted in streamlined workflows and a relief of bottlenecks.

The exponential growth of electronic resources and the workflows that have developed and evolved around them have put strain on this status quo and required workflows to become more fluid in order to adapt to the new systems and technologies available for managing these resources. Acquisitions and cataloging departments have needed to address how to handle these resources in new ways and using new tools. In some cases, a new position for an e-resources librarian or technician was created in order to develop the expertise needed to establish and execute new workflows for these materials. Developing and refining new workflows for e-resources has been the digital equivalent of reducing the number of times a cart of materials gets moved around within or between departments.

For most libraries, the tool of choice for managing electronic resources, particularly e-journal subscriptions and database titles, has become the knowledge base, an index of electronic collections that sits outside of the traditional ILS (integrated library system) OPAC (online public access catalog) and which can be customized to reflect a library’s e-resource holdings. Managing e-resources manually in the ILS is not feasible given how often journal content moves between platforms and publishers and the fluidity of restrictions publishers
place on e-journal content within databases. Depending on whether a library imported vended records for its approval book plans, electronic resources marked an increasing reliance on vended data to support what have today become the vast majority of yearly library collections purchased—electronic resources. Libraries chose one of two paths for managing the divide between the KB and the OPAC for electronic resources: (1) reconcile the KB with the OPAC by further purchasing a MARC record-loading service that would push bibliographic records and holdings into the OPAC for everything activated in the KB, or (2) teach the user to search for print books and journals in the OPAC and electronic journals via the KB’s A–Z list. The degree to which the management of electronic resources involved staff located in acquisitions, IT, cataloging departments, or new electronic resource management (ERM)-focused units was often the result of the size of the library and the degree to which ERM was perceived to fit into the existing print workflow of these traditional units or something new that required different skills, different personnel, and a different structure. For those libraries who chose to maintain separate search points between e-resources and print resources, the implementation of cloud-hosted discovery systems was meant to finally bridge the divide between silos, allowing libraries to return to one central interface for the management and discovery of all resources.

As with any migration to a new system, the opportunity to reexamine local practices should never be overlooked, but this advice is perhaps even more important for cloud-based systems, as the PALNI (Private Academic Library Network of Indiana) libraries discovered after their group migration to Primo. The libraries had used Aleph and assumed their workflow practices were similar based on what they believed to be common use of the same system. As the libraries moved to implement a cloud-based system, they quickly realized the difference between the two technologies, becoming painfully aware that each library’s locally hosted instance of Aleph had resulted in divergent implementations, updates, and use of Aleph over many years. Since cloud-based systems do not allow for the kind of customization typically seen in locally hosted systems, these differences had to be normalized, and the libraries reported that a lot of data cleanup was necessary to ensure that the data fed into the new shared discovery layer would be consistent. The reality is that libraries do not always
anticipate the need to examine local workflows and legacy practices and sometimes miss the chance to fully realize the benefit of the automation and economies of scale possible with cloud-based technologies, unless, like the Orbis Cascade Alliance libraries, they learn to plan for it. Having had some experience with the challenges of group migrations from their initial exploration of OCLC’s WorldShare Management System (WMS), the Alliance members deliberately built in time for reconciling differences in workflow across member libraries into their implementation plan after a rigorous RFI and RFP process and subsequent selection of Ex Libris Alma with Primo for their shared LSP and discovery solution.

Another factor in the restructuring of technical services departments is the reality of working with fewer staff. As Doherty and Piper point out, one advantage for smaller libraries experiencing attrition is the ease with which staff can implement new workflows and experiment with new technologies when not weighed down by layers of bureaucracy and departmental cultures that inhibit staff from rethinking legacy processes. For larger institutions who wish to emulate this kind of agility, cross-training is a necessity for improving even the most basic functions and workflows between departments, helping to remove long-standing silos within and between departments, all of which must be refocused on what the user most needs. Eden is right when he says, “The status quo of technical services operations is no longer viable or cost-effective; all of us must look at ways to regain market share and restructure our organizations to collaborate and consult with users regarding their information and research needs.”

To continue doing the work in the same way it has always been done risks falling behind in meeting new needs. It also risks the reputation of the library with the campus community.

Technical services units increasingly find themselves needing more collaboration with other library units in response to the shift of collection development strategies away from owning collections “just in case” toward accessing collections “just in time.” Reducing the physical footprint of little-used print collections can provide new opportunities for technical services staff. Laskowski and Maddox Abbott highlight how merging branch libraries, collections, and services at the University of Illinois at Urbana–Champaign allowed the technical services staff to demonstrate their effectiveness in supporting
the changing mission of the libraries. Communicating more effectively with their peers in public services and reducing the territorial division of labor between technical services and public services staff is vital to any library’s ability to achieve a new service model.

To build discovery-to-delivery services in response to user demand, libraries may also find they need a very different structure, staff, and skills. In an effort to create what Yue calls “a new focus on designing a comprehensive and cohesive suite of user-centered, discovery-and-access services . . .,” the University of Nevada, Reno, created a knowledge access and discovery position. Recognizing that position would need support, three support staff were re-tasked to the new Discovery and Design department and received additional training in managing e-resources, library discovery platforms, and web services while also becoming trainers for teaching other staff new skills. Other libraries have formed new departments and positions around discovery, such as Wayne State University’s Discovery Services Department, which was created in 2011–2012 in recognition of the interdependence of metadata and discovery technologies. Polak explains: “As our physical cataloging workload has changed from cataloging single items to more and more batch data manipulation, a more technology reliant methodology, it has continued to make sense for our teams to be integrated.”

A welcome outcome of these shifts is that technical services departments have become proactive rather than reactive. Technical services staff have moved from transaction-based workflows to comprehensive and integrated solution processes. As Moore and Weinheimer note, “we are not collecting fewer or cataloging simpler resources. Instead, we are collecting more resources, and they are providing greater challenges.” In order to work effectively in building more robust library services, technical services departments find themselves in greater collaboration with other library departments in the planning and support of projects. Gibson describes technical services as “a bridge between understanding how the tools work and how to use them effectively” within a library landscape defined by new user expectations and supporting services that allows students and faculty to create new knowledge rather than simply consume it. Routine actions performed in isolation by specialists whose sole purpose is to caretake owned collections is no longer possible in the new world of library services. Every staff member must work from a holistic approach, keenly
aware of how the work they do impacts others in the organization. More importantly, every staff member must be able to communicate effectively, embracing and refining skills like collegiality and effective communication that make cooperative endeavors a success when the goal is creating transformational solutions to user needs.

At UMD Libraries, the impact of staff attrition combined with serials inflation and new user needs for physical space created an environment in which the UMD Libraries had to look at building and maintaining collections in a different way. To remain oblivious to these larger forces for change would have left the traditional technical services units with seemingly no role in the new user-focused collection services landscape. Conscious of that fact, the UMD Libraries deliberately began to look at how the work and workflows had already changed over the last decade and began to project future staffing needs. The longer history of this transformation is important, as the staff experience between the former Acquisitions and Metadata Services departments in terms of training for new tasks, cross-departmental workflows, and smaller departmental restructuring are what led to a much larger reorganization across what would become the four different departments within Collection Services. The reorganization and streamlining of workflows will hopefully allow nimble processes, proactively addressing the challenges of creating new discovery to delivery initiatives robust enough to meet a primarily on-demand collection model, connecting legacy print and e-journal subscriptions to digital surrogates held in external cooperative collections, branch closings, and increased involvement in digital projects to better serve the unique and locally held collections.

REFRAMING EXPECTATIONS

Upon starting as the new head of Acquisitions at the UMD Libraries in 2007, Ohler found that many of the units in technical services badly needed to reevaluate legacy processes in light of new work done with new systems and new tools. One area of immediate need was the process by which acquisitions staff were ordering monographic books. Prohibited from exporting bibliographic records from OCLC into the local catalog at the point of order due to the outmoded idea that only cataloging staff could correctly identify the best record, acquisitions...
staff, who were primarily library technicians, were forced to manually enter bibliographic records in the ILS for their orders, then duplicate that work in the vendor interface for the vast majority of English language titles ordered. Although the UMD Libraries had finally implemented electronic data interchange (EDI) billing for approval plan books, it had not implemented EDI ordering or billing for firm orders, nor any shelf-ready processing. Unlike most libraries who had long ago implemented these services, the UMD Libraries remained skeptical of the benefits that such routine automation could provide. That soon changed.

A long-standing complaint of the UMD Libraries’ public service librarians, particularly those working closely with teaching faculty, was that once a request had been submitted to Acquisitions, faculty had no way to see in the public catalog that the book had been ordered. User expectations had changed, courtesy of the online retail experience, and library personnel were increasingly unable to justify work processes that did not meet those new standards of customer service. Likewise, faculty and students, particularly those served primarily by content held in one of the branch libraries, were becoming more vocal about asking why approval books appearing in the library catalog as “in process” were slow to reach the stacks. Many who complained noted that their peers at other universities did not seem to have this problem. After a year of tracking these kinds of complaints, Ohler suggested that the UMD Libraries take another look at implementing copy cataloging at the point of order in Acquisitions, as well as shelf-ready for both firm orders and approval books.

While in the past the UMD Libraries’ technical services units had attempted to spread cataloging expertise throughout the division, including acquisitions staff, the expectations and procedures drafted for staff to follow did not take into account that acquisitions staff were (1) not working with the book in hand already, (2) were often working with cryptic or incomplete title and author information supplied by subject librarians or faculty and students on paper order request forms, and (3) had to match up that cryptic information with what may be limited or incomplete information available through a book vendor database or a publisher website. A testament to the skill it took to identify and acquire books with such limited information, statistics showed users and subject librarians agreed that acquisitions staff ordered the “correct” title 99.5% of the time,
even foreign language and challenging format titles such as music CDs. By early 2008, cataloging staff had created bibliographic export templates in OCLC for acquisitions staff to use at the point of order, bringing in OCLC records for the resource to be ordered. These templates are still used today for those few formats and resources not easily acquired through an approval or vendor service.

Over time, the cataloging staff working closely with acquisitions staff began to appreciate the skill and expertise held by their colleagues in Acquisitions. Even still, it took another few months to convince both the cataloging staff and subject liaison librarians to embrace the idea that vended cataloging and shelf-ready for both approval and firm-order books was in the best interest of the users. In order to inform the conversation, acquisitions staff had researched the number of books returned by subject liaisons due to being out of scope for the collection over the course of the past five years of the approval plan and discovered that no books had ever been returned. After demonstrating how much more quickly books would reach the library users, the UMD Libraries decided that shelf-ready would be implemented. There were many challenges in getting the technical specifications right for such a large part of the Libraries’ book acquisitions, but by now the comradery between the acquisitions and cataloging staff was such that they weathered the bumps together, troubleshooting and communicating with each other when things needed to be adjusted or corrected. As a direct result of the cooperation initiated between acquisitions and cataloging staff in the move to cataloging at the point of order and implementing shelf-ready for approval and firm orders from our primary book vendor, the Libraries’ technical services units had succeeded in reframing the expectations for copy cataloging and moving the UMD Libraries closer to embracing a better service model for users.

LEARNING FROM EACH OTHER

While workflows for cataloging at the point of order became established, the UMD Libraries also needed to develop and implement workflows for cataloging and providing access to electronic materials. The UMD Libraries had been using the SFX knowledge base to manage holdings and access to e-journals since 2003, discontinuing the
effort to manually manage these in the ILS. Meanwhile, e-book record sets continued to be loaded into the ILS. As the e-book purchases increased, loading e-book records into the ILS was not a sustainable practice, particularly for collections that saw frequent content added or removed, often rendering the catalog out of date within months. This issue was the deciding point for how e-books were to be managed going forward. The goal was to start ordering e-books through approval and firm order accounts, as well as start a demand-driven acquisition (DDA) program, but this could not be done without automation. SFX was not the best tool to manage e-books, and the UMD Libraries knew that OCLC was building an automated KB workflow for libraries working with EBL and ebrary. The UMD Libraries had been evaluating discovery systems in 2008, and in May 2009 the Libraries replaced the local OPAC with WorldCat Local, locally branded as WorldCat UMD. The central interface for searching all materials across the ILS and SFX, the new workflows OCLC was building between its traditional cataloging database and its new knowledge base showed promise for WorldCat UMD users.

In early 2012 the UMD Libraries initiated a project to increase the presence of title-level discovery and access via WorldCat UMD for e-books with a fully automated process, particularly for those books belonging to a DDA collection. WorldCat Local and the development of the WorldCat knowledge base (WCKB) was chosen because they saved UMD Libraries time and money once they were developed enough to support the workflow. It was no longer necessary to load e-book records into the ILS or pay a vendor for OCLC records. It was also no longer necessary to duplicate or triplicate that work by having to further set the holdings in OCLC and then activate the resource in the KB and link resolver. And most importantly for the DDA e-books, it was not necessary to load a DDA e-book record into the ILS and then manually remove it when a purchase was triggered for ownership. Instead, OCLC would receive the data for the e-book holdings directly from the content provider, automatically activating the books in the WCKB and setting the holdings on the appropriate bibliographic record within WorldCat.

One of the challenges in implementing WorldCat Local and WCKB was ensuring that staff in both the acquisitions and cataloging units had the skills needed to transition to this new interface and workflow.
In the absence of strong leadership within technical services, mistakes were made. Some cataloging librarians were reluctant to seek input from staff with e-resource management and knowledge base experience, which led to incomplete or incorrect workflows as well as incorrect data. Meanwhile, acquisitions staff who had already learned how to use the WorldCat knowledge base and were troubleshooting access problems reported by users in the new interface had to reconcile differing workflows between SFX and WCKB and felt sidelined from helping with the work to be done for e-books. On top of this, working with a system or tool that is still in development was an arduous process as its features and functions were in constant flux. Many staff in both departments reported frustration with the system that was still in development. However, once some of the missteps in implementation had been addressed, staff from both departments sought each other out to overhaul the workflows. This process cemented staff’s ability and willingness to work together to develop and implement flexible workflows that could mature alongside the system. This was hard work for all, but eventually the work came together and the system became the backbone of the workflow processes.

Within a recently reorganized cataloging department now called Metadata Services, a new unit was created specifically to work on the e-book workflow. Metadata Resource Management and Discovery (MRMD) consisted of cataloging librarians and technicians who would focus on providing discovery for e-books and e-book collections. Technicians worked mainly on an e-book version of shelf-ready and the librarians focused on activating collections of e-books within the WCKB for already purchased materials. After MRMD was created, Putnam was hired as its supervisor in June of 2012, and he needed to quickly learn the new collection creation process. This was complicated by the fact that the librarian overseeing the new process had accepted a new position elsewhere. Since the e-shelf-ready process was stable, Putnam concentrated on the creation and monitoring of WCKB collections with the two librarians assigned to this work. Together they divided up the list of collections by provider. They also began to work closely with acquisitions staff to get entitlement lists and determine what resources were actually available.

In June 2013 a library-wide forum was held to discuss issues surrounding discovery. The aim of the forum was to look at what
discovery meant to the UMD Libraries community. As a result, a new group was established to take a holistic look at the discovery tools used by the Libraries and to learn from each other while pursuing discovery features that could help users. One of the key aspects of the new Discovery Group was to be as inclusive as possible with representation from all areas of the UMD Libraries: technical services (cataloging and acquisitions), public services (reference, subject specialists, circulation, and special collections), and IT systems (ILS and digital programs). Because the group was user focused, approximately half of the members were from public services areas, with the other half from systems and technical services. There was also a mix of technicians and librarians. Another result of the collaboration was the creation of two liaison positions who would sit as ex officio members of both the Web Advisory Committee and the Instruction Council, two other library-wide groups with a vested interest in the outcomes of the Discovery Group. The group was co-chaired by the new MRMD unit supervisor and the access services librarian. During its first two years of existence, the Discovery Group did an admirable job of assessing finding tools, including their metadata practices, conducting user studies, developing internal and external communication plans, and providing input and recommendations on the configuration of the discovery tools.

REVEALING THE GAPS

In July 2015, a month after the Discovery Group had come to the end of its two-year charge, the UMD Libraries moved from WorldCat Local to WorldCat Discovery. Before that time, the bulk of the work with e-books had been done by the cataloging unit and the work with e-journals within the acquisitions unit, even though both areas were using the same tools and similar processes. The disconnect between what data was more current in which knowledge base between SFX and WCKB was becoming more noticeable, and the expectation that library staff could continue to manage resources between the two systems or manually update the same data between them was not sustainable. Recognizing this, Putnam approached Ohler about how the two units could better collaborate on e-resource management.
This led to a library-wide decision to move e-journal management from SFX to the WCKB and migrate to the OCLC link resolver, thus streamlining workflows for managing all e-resources within the same system. This massive migration project was a great step in cementing the cooperation between the two units.

There were definite benefits to this transition. Managing all the e-resources in a single system provided an opportunity to more readily evaluate the e-resource collections as data. The two units also worked hard at cross-training, such as sharing Excel formulas and tips for comparing entitlements lists from vendors to title lists within the WCKB. After the initial e-journal load to the WCKB, Parker, the metadata librarian, developed some basic commands to run from the command line in order to parse and evaluate the UMD Libraries’ full WCKB holdings from the Knowledge Bases And Related Tools (KBART) file, simplifying the evaluation process as the file is too large to open in Excel. Parker then trained two librarians from the acquisitions unit on using these tools, enabling them with the ability to evaluate remaining gaps from the e-journal migration to WCKB.

Despite these benefits, the UMD Libraries’ timing of the move from SFX to WCKB had a critical flaw in relation to the new library-wide Discovery Group. Discovery@UMD 2.0, the second iteration of the Discovery Group, was charged in September 2015 to provide leadership by developing innovative, user-centered solutions to enhance the user experience in the discovery of content from all sources and in all formats and material types. It retained its commitment to a broad perspective of library staff, but the leadership and individuals changed as initial members rotated off the group. While the first Discovery Group had succeeded through its effective communication and interactions, Discovery@UMD 2.0 struggled to achieve the same success and was ill-equipped to deal with the negative reaction from students and faculty about the switch to WCKB. Despite what was thought to be widespread communication to students and faculty about the switch, which was scheduled during the winter break, was not well received and the complaints rolled in at all levels of management when they returned for the spring semester. This coupled with a slow follow-up to the campus community led to concerns about the effectiveness of Discovery@UMD 2.0. This outcome illustrated the need for more direct input from subject librarians, who
work more closely with faculty and students and could have helped inform their constituencies of the change. By the summer of 2016, the concerns of subject librarians that the new Discovery Group needed a different focus were becoming louder.

Having learned some valuable lessons, Discovery@UMD 2.0 regrouped in September 2016 with a nearly identical charge and new leadership. The focus of initiatives became better informed by a concerted group of subject librarians who were able to benchmark other libraries’ experiences with discovery and explore gathering user feedback from their own subject constituencies, all of which allowed the group to better manage some of the expectations surrounding discovery. Using this charge, the group developed a work plan focused on three broad areas: define an “ideal state” for discovery and delivery at UMD Libraries, improve access and fulfillment in discovery, and foster an informed and knowledgeable library staff. While the membership in this iteration of the Discovery@UMD 2.0 included stakeholders from every division, it became clear that it needed dedicated staff to address problems and help test and implement any proposed solutions. Through the course of this benchmarking, the group also saw several institutions adding or reimagining positions to deal with discovery, and in some cases creating new departments focused specifically on discovery, delivery, and access.

A NEW ORGANIZATIONAL STRUCTURE FOR GROWTH

In August of 2016 Putnam left UMD, and the planning process for a new organizational structure began. Before leaving, he and Ohler had many conversations with the associate dean of Collection Strategies and Services about how future technical services areas could function, knowing there would be a continued emphasis on e-materials and discovery and that cataloging skills would continue to grow past MARC and further into knowledge bases and digital collections. One decision that needed to be made was whether to replace the head of Metadata Services position or use that position for something else. If this position were to be reconfigured, cataloging management would need to be rethought, which would also provide an opportunity to look at acquisitions units.
In September of 2016, staff in both Acquisitions and Metadata Services were asked to examine workflows related to their departments—in particular, to look at collaborations between units elsewhere in the division and throughout the UMD Libraries. An additional goal of this review was to identify any potential areas in need of efficiencies. The two areas of need consistently identified by both acquisitions and cataloging staff were discovery and metadata work, particularly as they related to e-resource management, usability and discovery interface issues, troubleshooting metadata issues hampering e-resource access, managing large data sets relating to customizing e-resource collections, and communicating with other units in the UMD Libraries about these often very complicated issues.

The discovery workflows at both the unit and department levels exposed some redundancies, but they also made plain that the major challenge was in managing the discovery tools, particularly in relation to the larger UMD Libraries. Staff from many different parts of the Libraries played some role in these workflows, but they had become inefficient, uncertain, and too distributed within technical services. While it’s always wise to have staff share knowledge between them about tools and workflows, there was a need to consolidate staff with core responsibilities for discovery to allow them to work more closely together and have a common voice when communicating with other library units. The flip side of this was that there were too few librarians focused on metadata for digital collections and data sets, and work was backlogging despite the best efforts of Parker as the lone metadata librarian among 22 librarians and technicians in a Metadata Services unit primarily devoted to traditional cataloging functions. The review of unit and departmental workflows made it clear that the UMD Libraries would benefit from the addition of a position that focused on all aspects of discovery. This position would be a bridge between work done in acquisitions and cataloging, but also other units in the UMD Libraries for which discovery was an important issue, such as systems, collection development, subject specialists, access services, resource sharing, and user education. It would also free up Parker to focus on metadata work again, no longer struggling between prioritizing discovery versus metadata. To that end, in November of 2016, managers in Metadata Services submitted a staffing request for a discovery
librarian position. Acquisitions supported the position as one that would benefit both units.

After discussion with the library administration, it became clear that the UMD Libraries’ budget would not support adding a new position while backfilling the head of Metadata Services. The associate dean of Collection Strategies and Services decided to split the former Acquisitions and Metadata Services units into four departments, promoting four of the existing librarians to department heads and Ohler to a director and trading the Metadata Services head position for a new discovery librarian position. Collection Services, led by Ohler, was implemented in April 2017. As seen in figure 8.1, Collection Services is part of the larger Collection Strategies and Services Division and is comprised of 32 FTE librarians and library staff, 3 graduate assistants, and 3 hourly contract librarians spread across four departments: Acquisitions and Data Services, Continuing Resources and Database Management, Discovery and Metadata Services, and Original and Special Collections Cataloging.

After a successful search, the new discovery librarian began work in Discovery and Metadata Services in August 2017. As seen in figure 8.2, the discovery librarian is one of five in a department comprised of two professional librarians, one of which is the department head, one professional non-librarian copy cataloger, one library services technician copy cataloger, and one graduate assistant. The decision to move two traditional copy catalogers into this new unit was both an acknowledgment that support for discovery and metadata was needed at all staffing levels and a recognition of the interest these two library staff members have expressed in learning more about discovery and metadata tools since currently they manage the majority of the firm-order e-books in WCKB. The flat reporting structure is deliberate; all positions in the department report to the department head, reinforcing an egalitarian culture in which the structure does not distinguish between rank and professional status. Departmental members all have their strengths and are expected to work with each other to learn and share knowledge.

UMD Libraries is already seeing the benefits of having the discovery librarian on board. During his first week on the job, he played a critical role in monitoring the discovery interface, tracking a performance problem as the UMD Libraries worked with OCLC to test
Figure 8.1 Collections Strategies and Services organization chart.

Figure 8.2 Discovery and Metadata Services organization chart.
solutions for it. It is also expected that he will take a leadership role in the continually evolving Discovery Group, leading the implementation of improvements to the discovery environment, further investigating usability, and coordinating the conversation that is needed across the multiple units and committees responsible for parts of this process.

Since the transition, some additional goals of the reorganization are beginning to materialize. The shift to four smaller units spreads cataloging expertise more evenly across the four departments. Meanwhile, staff have access to information sharing groups for both cataloging and e-resource management skills, open to anyone with an interest in them. One goal of these sessions, in addition to information sharing, is to continue to foster a sense of unity and collegiality across the new departments. Ohler and the Collection Services department heads also recently held a daylong retreat for the staff, the first of its kind for many of them. The goal of the retreat was to provide a forum for the group as a whole to define a mission, a vision, and values that reflect the contributions they make to the wider library organization. This experience also allowed the collection services staff to identify and discuss concerns and issues important to them, something that is now becoming the basis of the Collection Services Strategic Plan for the next two years.

CONCLUSIONS

The iterative process toward reorganization exemplifies some lessons that are important to any library. Taking a longer view of the organizational history and observing changes over time can certainly help any library in identifying the direction it may need or want to go. It can also bring clarity on the missteps of the past that need to be avoided. Conscious steps were taken not to employ new librarians for the purpose of acting as change agents unless the organizational structure was reorganized to ensure the success for that entire area of responsibility. In our collective experience, hiring someone with the intent of moving the library in an innovative direction is definitely worth doing, but it is unfair to that person if ensuring the resources, structure, and support needed to achieve that goal is not also a priority for the organization itself. The flipside of this issue is knowing when
responsibilities must be assigned to specific individuals whose role is to ensure their completion and success. It is crucial that libraries identify where specific responsibilities like discovery should reside within an organization and that staff dedicated to discovery services be hired to work on them. Adding these responsibilities to an existing position or to staff who otherwise are focused on other important areas of the library is not sustainable.

Another area for lessons is understanding how to minimize territorial feelings surrounding new areas of responsibility, whether internally across departments or externally across the libraries. That message starts with leadership. Any issue affecting the collegiality of individuals meant to work across different structural areas has to be addressed quickly and in a way that does not sideline the expertise and talent of those who otherwise could contribute to the organization’s success. One very important goal for this reorganization was a reset on the relationship between public services and collection services staff at the UMD Libraries. Ohler deliberately sought the advice of the newly promoted director of User Services and Resource Sharing, who had recently held a retreat and led a reorganization effort of his own. When he offered to help with planning and facilitating the Collection Services retreat, Ohler and the Collection Services heads were delighted to accept his kind offer.

Collection Services also sought the advice of internal stakeholders throughout the UMD Libraries who work closely with Collection Services units to find out what we were doing well and where we needed improvement. One outcome from these conversations may lead to a library-wide effort to better coordinate customer service and user communication under a new service model embraced by all library units. In modeling a behavior of trust and openness, we hope this reinforces for our colleagues that Collection Services should always be at the planning table when it comes to library-wide projects and initiatives. As the UMD Libraries moves toward more on-demand services for collections, other areas in need of this same sort of collaboration are managing research and big data sets, usability testing across the UMD Libraries’ many user interfaces, connecting legacy collections reliably to digital surrogates, maintaining perpetual access entitlements for former e-journal subscriptions, and implementing new sustainable services and tools that ensure on-demand fulfillment.
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