

# **TELLING THE TECHNICAL SERVICES STORY**

## **COMMUNICATING VALUE**

EDITED BY  
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and  
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# Contents

Introduction *ix*

## PART I

## COMMUNICATION WITHIN THE DEPARTMENT

- |   |           |
|---|-----------|
| <b>1   Usable Documentation for Technical Services</b>  | <b>3</b>  |
| How to Win Friends and Confluence People<br>AUTUMN FAULKNER AND EMILY SANFORD                                       |           |
| <b>2   Using Basecamp Project Management Software to Improve Communication and Efficiency</b>                       | <b>21</b> |
| PATRICK FLANIGAN  |           |
| <b>3   Retreating to Advance Together</b>   | <b>35</b> |
| Communicating through Internal and External Retreats<br>GWEN MEYER GREGORY  |           |
| <b>4   Up, Down, and Sideways</b>   | <b>49</b> |
| Multidirectional Communication within a Multifaceted Technical Services Project<br>MELISSA MOLL AND SHELBY STROMMER |           |

**PART II COMMUNICATION ACROSS LIBRARY DEPARTMENTS**

<b>5  </b>	<b>Small but Mighty</b>	<b>65</b>
	Cultivating a Community of Practice to Document the Past and Prepare for the Future	
	KAYLAN ELLIS, JENNIFER DONLEY, AND CHRISTOPHER DEEMS	
<b>6  </b>	<b>Interdepartmental Communication through Informational Classes</b>	<b>79</b>
	Creating a Community of Cataloging and Metadata Stakeholders in an Academic Library	
	XIYING MI, BONITA POLLOCK, AND BRIAN FALATO	
<b>7  </b>	<b>Improving Interdepartmental Communication and Workflows</b>	<b>95</b>
	A Survey of Workflow Tools and the Implementation of Trello at the University of Colorado Boulder Libraries	
	ERIN BLOCK AND KIMBERLY LAWLER	
<b>8  </b>	<b>Communicating E-Resource Access Issues</b>	<b>109</b>
	Marymount University's Steps to Create Troubleshooting Training for Public Services	
	MEGHAN BURKE	
<b>9  </b>	<b>Investigating Communication Breakdown between Technical Services Departments and Subject Librarians</b>	<b>125</b>
	JENNIFER A. MEZICK AND ELYSSA M. GOULD	

**PART III COMMUNICATION OUTSIDE THE LIBRARY**

<b>10  </b>	<b>Collections as a Campus Conversation</b>	<b>139</b>
	The Colorado School of Mines' Approach to Collection Development	
	ANNA SEIFFERT	

<b>11  </b>	<b>What Difference Does It Make?</b>	<b>151</b>
	Marketing in Technical Services at a Special Library HILARY HARGIS AND JENNY NOVACESCU	
<b>12  </b>	<b>Continuous Improvement</b>	<b>167</b>
	Using Collaboration between Technical Services, IT, and Public Services to Make an Impact HEATHER JEFFCOAT, MARLEE GIVENS, SOFIA SLUTSKAYA, AND KAREN E. VIARS	
<b>13  </b>	<b>Expand Your Reach, Empower Your Community</b>	<b>181</b>
	Implementing a Metadata Outreach Service Program MAGGIE DULL	
<b>14  </b>	<b>Hope for the Best, Prepare for the Worst</b>	<b>197</b>
	A Case Study for Engaging Faculty and University Administration with a Multiyear Deselection Project JAMIE HAZLITT AND GLENN JOHNSON-GRAU	
	Appendixes	
	<i>Appendix A: Follow-Up Survey Questions</i>	209
	<i>Appendix B: Example of a Collections Updates E-Mail</i>	213
	<i>Appendix C: Browse Feature in Primo</i>	215
	<i>Appendix D: Questions for IRB Protocol "How Undergraduate Students Use the Primo Catalog"</i>	217
	About the Contributors	219
	Index	235

## Introduction

The work of technical services librarians and staff has long since moved beyond an exclusive focus on the daily acquisition, cataloging, and processing of materials. In this era of increased cross-departmental collaboration, evolving technology, shrinking budgets, and the misconception by some that researchers only need access to a Google search box, the staff in technical services departments must be able to communicate the role their work plays in supporting the mission of both their library and their larger institution. This book illustrates effective strategies that technical services departments have used to facilitate such communication.

The book's case studies are divided into three parts focusing on the intended audience, moving from internal communication to interdepartmental communication, and ending with communication external to the library. The chapters in this book were written by staff in research institutions across the United States, and though this may limit the book's scope in some ways, we feel that these studies can nevertheless provide a road map for an array of libraries.

The book's first part, "Communication within the Department," illustrates ways to improve communications within a technical services department. Autumn Faulkner and Emily Sanford start off by describing their department's complete overhaul of its documentation, thereby both improving the department's work product and fostering equity. In the next chapter, Patrick Flanigan shows the ways in which Basecamp can be used to support healthy

communication throughout a department. Following that, Gwen Gregory explains the myriad benefits that can come from regular technical services retreats. In the final chapter of this part, Melissa Moll and Shelby Strommer describe how they implemented multidirectional communication strategies to coordinate a large-scale collections project.

The chapters in part II, “Communication across Library Departments,” depict the ways in which collaboration has been fostered with library colleagues outside of technical services. This part begins with a chapter by Kaylan Ellis, Jennifer Donley, and Christopher Deems, who created a community of practice between the technical services and systems departments in their libraries. In the next chapter, Xiyang Mi, Bonita Pollock, and Brian Falato show how they established a series of cataloging classes for the public services department, thereby enhancing the cataloging knowledge of public-facing staff to better facilitate their work while simultaneously demonstrating the value of cataloging. In their chapter, Erin Block and Kimberly Lawler demonstrate how they used Trello to streamline the communication related to e-resource purchasing and activation across departments. Meghan Burke took a different approach to e-resource management at her library and established an e-resource ticketing system using Google tools to improve error notification and resolution. Jennifer Mezick and Elyssa M. Gould conclude part II with a description of how they improved their collection development processes by strengthening communication between technical services and subject librarians.

In the book’s third and final part, “Communication outside the Library,” the authors describe their experiences reaching beyond the library’s walls to better promote and further the work of their institutions. Anna Seiffert begins by explaining how her library improved the way it communicates information about its budget to its parent institution’s administration and faculty. In the next chapter, Hilary Hargis and Jenny Novacescu provide an overview of marketing concepts and show how technical services departments can aid directly in the marketing work of a library. In their chapter, Heather Jeffcoat, Marlee Givens, Sofia Slutskaya, and Karen E. Viars show how their library addressed the growing shift to an electronic resource-focused collection and how that move was communicated to the campus community. Maggie Dull’s department approached campus outreach in a different way, launching a service to provide metadata support for various stakeholder projects outside the library. In the last chapter, Jamie Hazlitt and Glenn Johnson-Grau describe a multifaceted weeding project that incorporated extensive and successful outreach and collaboration with faculty.

Facilitating better communication within our libraries is something we all strive to embrace. We hope that the following chapters provide useful information for all types of libraries and show the many ways that technical services departments can and do successfully tell their stories every day.

**PART I**

COMMUNICATION  
WITHIN THE  
DEPARTMENT

For Review Only



# 1

## Usable Documentation for Technical Services

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How to Win Friends and Confluence People

**W**hen considering good communication in the workplace, documentation is perhaps not the first thought that springs to mind—often it is an afterthought and develops ad hoc when the occasion dictates, and is jotted down quickly and watched over by accidental custodians. The importance of documentation, however, can be seen in how it sprouts up even when there is no particular plan for curating it. It pops up higgledy-piggledy in personal caches—on sticky notes, on printouts, in Google Docs, in saved e-mails, or in computer files. It exists in (sometimes) organized forms in unit wikis, intranets, and three-ring binders. Indeed, documentation is a natural by-product of the complex and precise work of technical services.

It is not a controversial statement to say that good documentation is useful. (In this context, *documentation* is understood as written instructions or information to guide workplace processes, and good documentation may be taken to mean documentation that is cohesive, formalized, and regularly maintained.) And yet this crucial form of communication often gets short shrift. There are many valid reasons why documentation slips to the bottom of the to-do list. It can be complicated and messy. Like a car or a toddler, it requires frequent maintenance and monitoring. It is not flashy and requires

time and energy that can already be in short supply in a busy workplace. However, we contend that intentional strategies around documentation support efficiency, workplace equity, and institutional memory.

## THE BENEFITS OF DOCUMENTATION

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The project discussed in this chapter was born out of a perceived need for a strategy to better care for our Technical Services Division's documentation at Michigan State University (MSU) Libraries. We wanted to alleviate pain points for those creating content and those consuming it by providing an organized and extensible framework and an easy-to-use interface. We applied research, project planning, and various user experience (UX) methods to accomplish our goal. In writing about our processes, we hope to provide something useful and applicable from our project that libraries can adapt for their own use.

When conducting a mental review of your unit's documentation, you should decide what level of effort is worthwhile and consider the two primary outcomes of *good* documentation: (1) quality and (2) equity.

### Why We Wanted to Do It

#### ***Documentation Supports High-Quality Work***

There is a direct line from good documentation to quality work. Traditional technical services (TS) work is detailed and highly structured by its very nature. The work must support multiple workflows that acquire, describe, process, track, and maintain a diverse set of materials through their library life cycle. In the last few decades, libraries have expanded their missions and incorporated more nontraditional items into their collections to support the research and information needs of their communities. TS rules and systems built to encapsulate the standard book have adapted to ingest nontraditional items, like online streaming media, cake pans, and soldering kits (to name a few). Now more than ever, our workflows cross traditional TS team lines. These workflows are complicated and often involve multiple individuals, if not multiple teams.

In this environment, shared documentation is vital to high-quality, accurate work. If reliable and easily referenced, it can reduce cognitive load, mistakes, redundancies, and questions. It can also ensure that library materials are treated consistently and follow more efficient paths to availability. Predictable data equals good discovery—as much for acquisitions staff creating fund code lists as for the front-end library user searching the catalog. Finally, documentation functions as an archive. TS work does not exist in a vacuum. The database represents an accumulation of past decisions and projects. Data created today must live and thrive in that existing ecosystem. Having

documentation helps mitigate the loss of institutional memory that follows retirements and system migrations. It further provides the bedrock on which we may build future library technical services environments.

### **Documentation Fosters Workplace Equity**

Just like other forms of workplace communication, documentation is crucial to staff empowerment. Through the distribution of shared knowledge and expertise, documentation ensures equal access to critical information, mitigates incidental or intentional gatekeeping, creates transparency in local decision-making and cross-divisional communication, and promotes the responsible stewardship of staff time and energy.

Transparency, accessibility, shared expertise, stewardship—any library strategic plan will include some of these as goals, and it is easy to connect them to workplace well-being. Good documentation means that newly trained Staff Member A knows to bring certain types of materials to a certain shelf for processing instead of bringing it to Staff Member B by mistake. While, of course, this should be no big deal in a collegial environment, we should not discount the everyday power dynamics of workplace interactions. What if Staff Member B is not comfortable correcting another person's mistakes and feels pressured instead to take on unassigned work? Inadequate documentation can potentially place staff in positions of insecurity, anxiety, or indecision.

Good documentation, by contrast, builds confidence and trust. Staff members exercise their own competencies and agency by searching for and following procedures; they spend less time navigating “who,” “what,” and “how” questions and have more capacity for questions of effectiveness. When an entire workflow is mapped out and visible, all those involved have access to the big picture and can be equal participants in workflow design.

### **A Note about Care**

We have discussed quality and equity as two important outcomes of good documentation. To view both of these from a more philosophical perspective, think of good documentation as a way of showing care—care for our end-users and care for our staff. Consider the four elements of the feminist care ethic as outlined by Joan Tronto and Bernice Fischer<sup>1</sup> and paraphrased for this context:

*Attentiveness*: awareness of and scanning for need

*Responsibility*: willingness to address need

*Competence*: skillful and appropriate methods of addressing that need

*Responsiveness*: consideration of users' positions and their perceptions of provided care

Effective documentation addresses each of these elements. We are attentive to the needs of our users, whose ability to access library resources quickly and intuitively depends on smooth workflows in TS. We are attentive to the needs of our staff by acknowledging the cognitive load of TS work and recognizing that it is unreasonable to expect them to commit thousands of details to memory. We accept the responsibility of providing reliable and accessible information to end-users and staff, and we commit to doing this competently and iteratively, in response to changing systems, materials, and use cases.

The last two elements are crucial. Any equity and empowerment that documentation achieves, and any return on investment of time and effort, are predicated on staff finding that documentation to be truly usable.

## WHY WE NEEDED TO DO IT

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The MSU Libraries' Technical Services Division comprises seven subunits: Acquisitions, Catalog Maintenance, Cataloging & Metadata Services, Copy Cataloging, Metadata Management (authorities work), Catalog Services (system management of the integrated library system, or ILS), and Electronic Resources. The division has a complement of approximately forty full-time employees who work together to acquire, catalog, process, and maintain library resources. With so many teams and staff members, not to mention student workers, we rely heavily on communication to coordinate our many workflows and processes. Our TS documentation has historically served as a central place for procedures, policies, and statistics-gathering. The division's documentation had been through several iterations over the decades as technology evolved, bouncing from binders to website to wiki to Drupal. The documentation had been edited or amended by various editors as needed and as time allowed. This unintentionally gave rise to a disjointed organization of topics, duplication, and conflicting or outdated information. The whole thing had ballooned to 300+ pages, which were punctuated with the names of former systems and staff members. All these factors meant that staff spent considerable time slogging through bloated and sometimes unreliable information. Content creators had a basic template to work with, but were essentially starting from scratch each time they needed to write a new procedure. Any changes to the menu options or templates required Web Services' assistance and permission.

Before we launched our project, the libraries' public-facing Drupal website was the repository for TS documentation. Its placement there was intentional to align with the university's land-grant philosophy of openly sharing information with the wider community for their use and benefit (a philosophy we replicated in our current site by making it publicly accessible). But the location

on the libraries' main website also triggered logistical issues. The search function searched the whole website, making it difficult to narrow a search to strictly TS documentation web pages. Searching "microfilm" in this interface would return relevant LibGuides for patrons on using microfilm, alongside TS internal documentation detailing local procedures for assigning call numbers to microfilm. This was as frustrating for TS staff as it was potentially confusing for users. Any changes to the documentation site's web pages, no matter how small, required Web Services' assistance to go live—typically at least a 24-hour turnaround. While our Web Services colleagues were responsive and helpful, these added steps were ultimately unsustainable for us considering the numerous edits our many pages warranted, and it felt like an underutilization of their skills and time.

## **ANALYSIS AND DEVELOPMENT OF THE PROJECT PLAN**

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### **Project Plan and Goals**

We had long discussed a project to evaluate the division's documentation. The project fell into our niche areas of interest. As catalogers, we rely on, recognize, and value good, organized documentation. Faulkner, as manager of the Copy Cataloging Team, often writes procedures and onboards new staff who rely heavily on documentation. Sanford, who spends part of her time within the libraries' User Experience Unit (UX), has long had an interest in the intersection between UX and technical services. In late 2017 our schedules aligned, and we got a green light to proceed with the project from our administrators. We understood that this would be a time-intensive undertaking with many moving parts, as well as a project we were pursuing in addition to our regular work. To that end, we developed a project plan to guide us and keep us on track. Our goals for the project were informed by our understanding of the documentation's pain points, which we have outlined in the above paragraphs. Our delineated project goals included:

- Improved information architecture for the overall site
- Increased findability and readability of procedures for users
- A simplified process to create/write/edit content (interface, guidelines, templates, built-in infrastructure, and accessibility)
- Future-proofing (accounting for future growth and developing a mechanism for routine reviews of content)
- Identifying gaps in the documentation of current workflows

To meet these goals, we developed a project checklist, shown in figure 1.1, with a multiphase approach.

Phase	Status	Comments
Concept	Done	Identify goals and plan an outline for project - get support of AD and assistant AD
Survey	Done	Analyze documentation pages of BTAA & similarly-sized peer research libraries.
Investigate	Done	Identify needs for TS documentation. Analyze content management systems to organize documentation - Drupal & Confluence. Present results.
Research	Done	Research and understand best practices around information architecture and document design.
Planning	Done	Complete affinity diagram, identify out-of-date pages, plan infrastructure & permissions.
Execution	In Process	Subscribe to CMS, set-up space (templates & permissions), move content, train staff, launch, refocus Drupal page.
Review	On-track	Identify gaps & one-person workflows, set-up review mechanism, analyze effectiveness.

**FIGURE 1.1**

A presentation slide from a report to colleagues on our project's road map as it neared completion

## Initial Analysis and Assessment

Using Google Forms, Sanford built a survey to gauge the staff's confidence in and usage of the existing documentation site. We had a good response rate of approximately 45 percent. Both closed- and open-ended questions were utilized to gather the data. The results confirmed our own observations—the site was unsearchable, hard to navigate, and out of date. The survey did not reveal any new insights, but provided confirmation that we were moving in the right direction. If you are working with a medium to large staff (anonymity is important; too small a staff and anonymity is hard to maintain), a survey might be a good first step to identify problem areas and hidden blind spots. Google Forms is free and relatively easy to use. All surveys are not created equal, and investing time into research on good survey development is a key first step.<sup>2</sup> It is also helpful to have a colleague complete a run-through of the survey to provide feedback and catch any assumptions or mistakes. Reading up on informed consent in survey deployment is also a must.

Having ascertained what our users thought, we turned to external examples of technical services documentation for ideas. Why reinvent the wheel? Comparative analysis, another user experience tool, is a process that identifies tools and strategies that already exist and could be adapted for use. Sanford completed a comparative analysis of the TS documentation sites of like-sized university libraries, especially our peers in the Big Ten Academic Alliance. That analysis found, among other things, a new tool we had not previously encountered: Confluence, a part of Atlassian's suite of products. Several university libraries and technical service departments were using it for their intranet and/or documentation sites.

## Accessible Design and Architecture

With identified user needs and comparative analysis in hand, we began investigating best practices around accessible design and information architecture. An entire chapter could be written about our findings, so we encourage you to consult our project archive (<https://tinyurl.com/MSULTSarchive>) if you wish to explore further, but here are the key takeaways:

The page and site design should aim to reduce cognitive load.

- Written technical procedures involve a significant demand on the reader's "internal storage."<sup>3</sup>
- The style and formatting of presented text have a direct effect on reader comprehension.
- Too many choices or too much information at once increases cognitive load and hinders decision-making. Navigation choices should be lean at the top.<sup>4</sup>

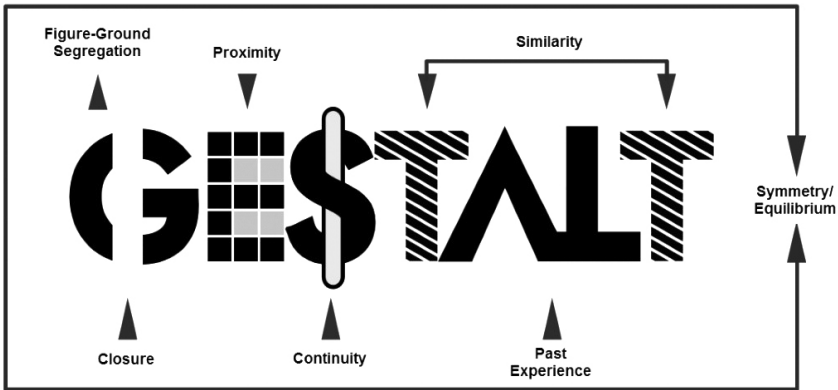
The page and site design should ensure accessibility.

- An online procedures site is better than paper documents or files stored on individual machines.
- Standardized structural elements should be used both site-wide and in individual pages to assist screen-reading software.
- We should comply with the Web Content Accessibility Guidelines 2.0 (WCAG) ([www.w3.org/TR/WCAG20/](http://www.w3.org/TR/WCAG20/)) recommendations and perform screen-reader testing.

To accomplish both of these mandates, we drew upon the Gestalt theory of design, the principles of plain language,<sup>5</sup> and the principles of information architecture. Gestalt theory orients itself to the tendency of the human brain to sort and synthesize pieces of information into an easily comprehensible whole. To best accommodate this instinctive behavior, the presentation of information should adhere to the principles illustrated in figure 1.2. The plain language approach emphasizes logic, context, conciseness, and clean design as aids to comprehension. The principles of information architecture encourage a clear demarcation of different types of content, meaningful choices, layered content, hierarchical presentation, and intuitive categorization and classification.

Using these principles and our known user needs, Faulkner generated a list of optimal features for our new documentation site:

- General
  - » Discoverable on the Web
  - » Intuitive editing interface
  - » Immediate publishing



**FIGURE 1.2**

This graphic illustrates each principle of the Gestalt theory of design. *Gestalt* is German for “a unified whole,” and these principles help to create quick recognition of that whole. When applied to text, as shown here, the principles work together to reduce cognitive load for the reader.

Figure-Ground Segregation Image courtesy of Turner & Schomberg (2016), licensed under CC BY 4.0; retrieved from <http://www.inthelibrarywiththeleadpipe.org/2016/accessibility>.

- Architecture and organization
  - » Tagging and searching
  - » Sidebar navigation with page trees and nesting
- Style and design
  - » Overall clean design with ample white space and contrast
  - » Page templates
  - » Quick creation of visual elements like lists, tables, lines, blocks, and so on
  - » Ability to attach images and files

## IMPLEMENTATION

### Why We Chose Confluence

When it came to the choice of a new platform to host the documentation site, we considered all the options known to us and identified in our comparative analysis. It came down to three contenders for a new platform: (1) a wiki, (2) an internal Drupal site developed for us by Web Services, and (3) Confluence. Using our needs list, we assessed each content management system.

Confluence is a “team collaboration software” that has document storage functionality and wiki-like features. When compared with our list of desired



# Index

## A

Acadia, Spencer, 66, 73  
achievements, acknowledging, 30  
Acquisitions Institute, 199  
activities, during retreats, 37, 40–41  
Activity feature (Basecamp), 30, 31*fig*  
administration, engagement and, 197–208  
affinity diagramming, 12–14  
Agee, A., 201  
agile project management, 53, 56  
Alma, 174, 183  
Aman, Mohammed M., 132–133  
appreciation, 30, 54–55  
Arthur Lakes Library, 139–150  
assessments  
    of informational classes, 89–91  
    of marketing, 156–157  
    of Primo, 174–175, 176*fig*  
    for retreats, 42, 43*fig*, 44*fig*  
attentiveness, 5–6  
authentication, single sign-on, 177–179

## B

Bartlett, Jennifer A., 66, 73

Basecamp, 21–33  
Bing, Margaret, 92  
Block, Erin, 99–100  
Bolman, Lee G., 37  
Boost feature (Basecamp), 30, 30*fig*  
brainstorming, 189–190  
breakdown in communication, 125–136  
Brightspot Strategy, 169  
Browse feature in Primo, 215–216  
burn-down chart, 56, 56*fig*

## C

California State University, Fullerton, 199  
Cannon, San, 187, 194  
card-sort activity, 37  
care, 5–6  
Carter, Sunshine, 110  
cataloging/cataloging projects, 25–26,  
    79–93  
Chigamba, Sekuru Tute, 186  
Chu, Brandon, 152  
Clark, Kirsten, 26  
cognitive load, reducing, 9, 15  
collaboration, model of, 169–172, 179

- collections
    - as campus conversation, 139–150
    - e-mail for updates on, 213–214
  - Colorado School of Mines, 139–150
  - communities of practice (COP), 65–77
  - community spaces, public and private, 71
  - comparative analysis, 8
  - competence, 5–6
  - Computers in Libraries Conference, 152
  - conceptual model of Metadata Outreach, 192, 192fig
  - Confluence, 8, 10–12, 15, 17–18, 98–99
  - controlled tags, 17
  - COVID-19 pandemic, 18, 21, 27, 75–76, 107, 193, 205
  - Cowell, M. E., 199
  - crisis management, 18
  - cross-departmental retreats, 41–42, 45–46
  - cross-training, 59
  - Cultivating Communities of Practice* (Wenger, McDermott, Snyder), 69
  - Cycle of True Marketing, 153
- D**
- data governance, 185, 187–189
  - Daugherty, Alice, 25
  - deaccessioning project, 161. *See also* weeding
  - decision-making authority, establishing, 59
  - DeMars, J. M., 199
  - Dempsey, Kathy, 153, 155
  - deselection project, 197–208. *See also* weeding
  - Di Monte, Lauren, 184
  - digital scholarship, 185–186
  - Digital Scholarship Lab (DSL), 185–186, 193–194
  - discovery interface, 173–177
  - documentation
    - benefits of, 4–6
    - challenges regarding, 22–23
    - effect of lack of, 68
    - as living documents, 75
    - online document-sharing tools and, 52, 74
    - patron-facing, 178
    - training and, 17
    - usable, 3–20
  - dualism, false, 92
  - Dublin Core, 183
  - Duke, Lynda, 154
  - Dysart and Jones Associates, 152
- E**
- e-books, 80
  - “Ebooks for the Classroom” (EB+) database, 80–81
  - e-mail
    - Basecamp and, 29
    - challenges regarding, 133
    - communication plan and, 86–87, 89
    - documentation and, 23–24
    - faculty engagement and, 205
    - interdepartmental communication and, 97–98
    - progress reports via, 56
  - Emory University, 174
  - Endangered Languages Archive, University of London, 187
  - engagement
    - administration and, 197–208
    - faculty and, 197–208
  - environment, positive team, 54–55
  - equity, documentation and workplace, 5
  - e-resource access issues, 109–123
  - evolution, design for, 69–70
  - excitement, 72–73
  - expectations, shared, 129
- F**
- facilitators, 39
  - faculty
    - collections and, 139, 140–141, 144, 146–147
    - engagement and, 197–208
    - research support for, 185, 186–187
  - false dualism, 92
  - familiarity, 72–73
  - feminist care ethic, 5–6
  - Fischer, Bernice, 5–6
  - flooding in Iowa (2008), 50
  - flow charts, 58–59
  - focus groups, 127–128, 128fig
  - follow-up surveys, questions for, 209–212

- formal communication, 133  
 Foster, Chris, 155, 160  
 Four Ps, 153–154  
 Fundamentals of Collection Development (Johnson), 153–154  
 Funnel training, 28–29
- G**
- Gallos, Joan V., 37  
 Generation Fifth Applications (GFA) software, 198, 200, 202, 207  
 Georgia Tech Library, 167–180  
 Georgia Tech Strategic Consulting (GTSC), 169  
 Gestalt theory of design, 9, 10*fig*, 15–16  
 Godin, Seth, 45  
 Google Analytics, 17  
 Google Drives, 29, 32  
 Google Forms, 8, 111  
 Google Sheets, 111  
 Gorman, Michael, 79  
 grapevines, 133  
 GreenGlass software, 200, 202, 207
- H**
- Hauser, Emily, 153, 156  
 Hempel, Jessi, 27, 32  
 Heterick Memorial Library (HML), 65–77  
 Hey! feature (Basecamp), 27–28, 28*fig*  
 high-density storage, 198  
 Hill, Kate, 110–111, 114  
 Hines, Samantha Schmehl, 25  
 Howley, Brendan, 152  
 human resource frame, 37
- I**
- Icebox Logic, 152  
 icebreakers, 40–41  
 improvement, continuous, 167–180  
 infographics, 56–58  
 informal communication, 133  
 information architecture, principles of, 9  
 informational classes, 79–93  
 in-person communication, 53  
 in-person review process, 202, 203–205, 206–207  
 interdepartmental communication, 79–93, 95–108
- Iowa GROW (Guided Reflection on Work) program, 55  
 IRB Protocol, questions for, 217–218
- J**
- Johnson, Peggy, 153–154, 155–156  
 Jones, Rebecca, 152  
 journal subscriptions, 139–150
- K**
- Kiser, Tim, 16–17  
 Kyker, Jennifer, 186
- L**
- Language Archive, Max Planck Institute, 187  
 Lawler, Kimberly, 99–100  
 Lee, Daniel, 152  
 Libraries Transform campaign, 155  
 Library Next, 167–180  
 linguistics archives, 187  
 linked data projects, 81, 84–85, 88, 92  
 Louderback, Pamela, 66  
 Love Data Week, 188  
 Loyola Marymount University (LMU), 197–208
- M**
- marketing mix, 153–154  
 marketing technical services, 151–165  
 Marymount University, 109–123  
 materials budgets, 139–150  
 McAllister, A. D., 200  
 McCready, Kate, 26  
 McDermott, Richard A., 69, 70, 71, 72  
 meetings, previous reliance on, 22–23  
 Message Board feature (Basecamp), 26, 27  
 metadata introduction class, 90–91, 90*fig*  
 Metadata Outreach/Metadata Services, 181–196  
 Michigan State University (MSU) libraries, 4, 6–19  
 Microsoft Office, 99, 100, 105  
 Microsoft Planner, 99, 100–102, 101*fig*  
 Microsoft Power Automate, 100, 101–102  
 minutes from meetings, 22–23, 72, 74  
 mission statements, 44–45  
 multidirectional communication, 49–61

Murray-Rust, Catherine, 167

## N

Name Authority Cooperative Program  
(NACO), 28–29

Novacescu, Jenny, 151

NVivo, 128–129

## O

Offering Inventory, 190–191, 190*fig*, 193

Ohio Northern University (ONU), 65–77

onboarding, 7, 131–132, 160, 161*fig*, 162

online document-sharing tools, 52, 74

open atmosphere, 54

OpenAthens, 177–179

Optics InfoBase Premium (OIB) journal  
package, 157

Orava, Hilkka, 81–82

outreach service programs, 181–196

## P

participation, levels of, 70–71

perspectives, inside and outside, 70

Phillips, K., 199

physical communication tools, 52

Ping feature (Basecamp), 28

plain language, principles of, 9, 15–16

planning, for retreats, 38–44

political frame, 37

portfolio management, 169–172, 171*fig*

positive team environment, 54–55

Primo, 174–177, 215–216

progress, communicating, 55–58

*Project Management in the Workplace*

(Daugherty and Hines), 25

Project Management Institute (PMI), 167,  
169

project management software, 21–33

promotion, 154–155

## Q

quality, documentation's support of, 4–5

QuestionPro, 129

questions, open atmosphere and, 54

## R

RDA Lab classes, 28–29

“ready reference” tools, 133–134

red rot, 54

reference training, 115–118

responsibility, 5–6

responsiveness, 5–6

retreats, 35–48, 36*fig*

rhythm for community, 73

River Campus Libraries (RCL), 181–196

Roles and Responsibilities document, 191,  
191*fig*

Roll, A., 199

## S

S+R Library Survey, 147

San Diego State University (SDSU)  
Library, 21

SCELC Shared Print Program, 200, 201

Scherlen, A., 200

Scott, K., 199

scrum meetings, 53

*Sekuru's Stories* (Chigamba and Kyker), 186

ServiceNow, 98–99

Sherwood, Emily, 185

Siewert, Karl G., 66

signs, 52

Singh, Rajesh, 22, 30

single sign-on authentication, 177–179

site usage, measuring, 17–18. *See also*  
usage statistics

Smith, Kelly, 110

Snyder, William, 69, 70, 71, 72

Space Telescope Science Institute (STScI),  
151–165

statistics-gathering points, 53

Storer, Robert, 155, 160

structural frame, 37

subject librarians, communication  
breakdown and, 125–136

succession planning, 66–67, 68

surveys

for assessing Primo, 174–175, 176*fig*

development of, 8

follow-up, 209–212

identifying problem areas with, 8

informational classes and, 83–86,

84*fig*, 85*fig*, 86*fig*, 90*fig*, 91*fig*

for marketing purposes, 157

regarding communication breakdown,  
129

- for retreats, 42, 43*fig*, 44*fig*
- Sustainable Collection Growth Project (SCGP), 202–207, 203*fig*, 205*fig*
- symbolic frame, 37
- Syndetics Unbound, 173

## T

- Taggart Law Library (TLL), 65–77
- technical services processes,
  - understanding, 129–130
- terminology training, 131
- Textbook Affordability Project (TAP), 80
- themes, for retreats, 39
- “This Is Broken” (Godin), 45
- ticketing systems, 109–123, 113*fig*
- To-do feature (Basecamp), 24–25, 25*fig*, 30
- Trall, Stacie, 110
- training
  - documentation and, 17
  - informal, 130–131
  - ongoing, 131–132
  - predictability of, 135
  - for single sign-on authentication, 178
  - terminology, 131
  - for troubleshooting, 109–123
- Trello, 95, 98–100, 99*fig*, 102*fig*, 105*fig*, 176, 177*fig*
- Tronto, Joan, 5–6
- troubleshooting training, 109–123
- Troy, S., 199
- Tucker, Toni, 154
- turnover, 67–68

## U

- University of California, Santa Cruz, 199, 200
- University of Colorado Boulder Libraries (CU Boulder), 95–108, 96*fig*
- University of Illinois (UIC), 35–48
- University of Iowa (UI) Libraries, 49–61
- University of Rochester, 181–196
- University of South Florida (USF) Tampa Library, 79–93
- University of Tennessee (UT) Libraries, 125–136
- usage statistics, 17–18, 143–144, 147, 149, 157, 168, 168*fig*
- User Experience Unit (UX), 7
- UX approach, 12–14

## V

- value, focus on, 72
- virtual browsing, 172–173

## W

- Walton, Richard E., 81
- Web Content Accessibility Guidelines 2.0, 9, 15–16
- weeding, 161, 197–208
- Wenger, Etienne, 69, 70, 71, 72
- William H. Hannon Library, 197–208
- workflow management tools, 98–108
- workplace equity, documentation and, 5

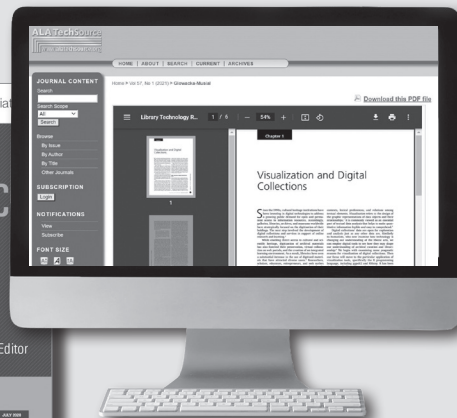
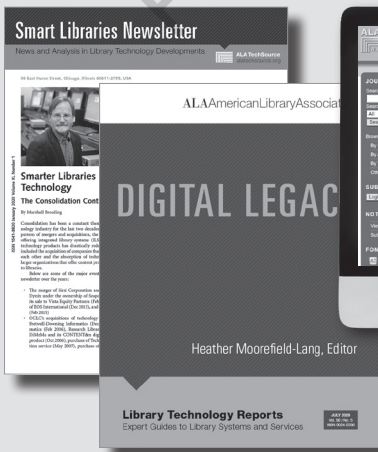


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