



Reality check: Minding the gap

By: Krista D. Schmidt

Abstract

This article details ideas for fostering intra-library relationships between technical services and reference/research and instruction units. Recommendations are given for six fundamental areas (background knowledge, schedules and timing, relationships and communication, details, money and once-in-a-blue-moon situations) that technical services and reference/research and instruction should target to increase effective communication and collaboration.

Schmidt, K.D. (2018). Reality check: Minding the gap. *Technicalities*, 38(2), 1, 4-6.

Archived version from NC DOCKS available at: <http://libres.uncg.edu/ir/wcu/listing.aspx?styp=ti&id=37211>.

Technicalities™

Information Forum for the Technical Services Professional

Reality Check.....➔

Minding the Gap

By Krista Schmidt

In times where it has become easier to self-segregate and to work collaboratively yet far apart, it is important to consider the gap between technical services and public services. I have spent time thinking and writing about this too common gap and how to bridge it and, in 2016, a yearlong collaboration with Tim Carstens, a technical services colleague, came to fruition as a book, *The Subject Liaison's Survival Guide to Technical Services*.¹ In this book, we tackled the topic of understanding technical



Krista Schmidt

services (collection development, acquisitions, and cataloging) for subject liaisons (those reference librarians who are responsible for teaching, reference work, and collection development for specific disciplines). This guide was the result of working in an institution that highly values strong ties between technical services and public services and my own experience as a subject liaison, having the opportunity to develop a robust understanding of how important technical services was to my success.

I have read enough library literature and talked to enough practicing librarians to know that this experience and these strong relationships are not necessarily the norm. To be frank, it is all too easy for public services and technical services to self-segregate. Our work seems so different, our work rhythms have little in common, our jargon and

(continued on page 4)

March/April 2018
Volume 38 No. 2

Continuities

See page 8

Interfaces

See page 13

Dollars and Decision-Making

See page 16

Book Reviews

See page 20

News From the Field

See page 23

Reality Check.....

Minding the Gap

(continued from page 1)

lingo may seem peculiar to one another, and we may be spatially separated in different areas—on different floors or even in different buildings. Even though the mission of the library may be the same for all, these differences can make building intra-library relationships difficult. However, creating and then nurturing these relationships are what strengthens the library and, I strongly believe, enables us to be our best selves. Strong relationships between units foster understanding of unique and shared challenges, help us approach each other with a better idea of what is reasonable to expect and request from each other, and ultimately help us advance the work of the library together. While the book is about technical services for subject liaisons, I would like to shift focus a bit and outline my thoughts on the key things for technical services staff to understand when it comes to working with liaisons. This column will not be about working the reference desk or training in public services (but do not let that stop you!). I have identified six fundamental areas for consideration: background knowledge, schedules and timing, relationships and communication, details, money, and the once-in-a-blue-moon situation.

Background Knowledge

Liaisons, particularly new-to-the-profession liaisons, may have more limited background knowledge in technical services areas than you expect because technical services courses, including cataloging and collection development, are not a necessary part of the core experience for MLS students interested in reference work. I am in the process of evaluating data for core

courses in the MLS curriculum across ALA-accredited programs and technical services courses are not considered requirements for many library education programs. This means that terms and concepts that guide technical services processes may be wholly unfamiliar to liaisons. For example, I would not assume that new liaisons know the difference between encumbrances and expenditures, cuts and reversions, or *RDA*, *AACR2*, and *MARC*.² As always, be mindful of discipline and institutional lingo and ease liaisons into understanding what you mean when you use it. Liaisons also may be unfamiliar with workflow and interrelatedness of units in technical services at anything other than at a very broad level. Training can help liaisons get up to speed with who, what, when, and where. My best piece of advice is to avoid non face-to-face, information dump training, which helps no one ever; be flexible enough to incorporate in-person training for the liaison—if possible, at a point of need.

Schedules and Timing

Liaison work and technical services work is often on opposite schedules when it comes to our busy and down times. Good timing is key to working effectively with other units and the technical services-liaison collaboration is no different. Raising technical service units' awareness of key busy times for liaisons helps regulate expectations for your units as to practical liaison response time. It also helps with project planning that requires liaison work or input. In other words, do not set a weeding deadline for mid to late September, when liaisons are likely to be very busy teaching. Moreover, communicate clearly to liaisons your

technical service's unit's own busy times and how that might affect liaison requests to these departments. For example, the end of the fiscal year is a bad time for a liaison to ask for an in-depth historical budget analysis for their seven liaison funds. We are all so often tuned into our own work that we sometimes miss even seemingly obvious non-verbal cues that now is not a good time to ask Unit X for that.

Relationships and Communication

Building good relationships and strong communication is crucial to organizational effectiveness, yet how often do we neglect it? I realize that I am fortunate that I work in a library that is of middling size and in a single building; proximity helps foster our communication and relationships here. Based on my experience, face-to-face meetings work best, particularly when beginning to build relationships or work on new projects and initiatives. It is all too easy to send out an e-mail, for example, with an explanation of your collection budgeting policy along with relevant allocation formulas, but face-to-face discussions allow you to gauge understanding of both the individuals and the group more effectively and quickly. These face-to-face interactions also set the foundation of communication so that when you do communicate using e-mail or the like, you are operating from a basic, yet shared, sense of understanding of the issue at hand. What if you do not have the convenience of proximity or your organization does not necessarily have a historical relationship of tight bonds or effective communication from unit to unit, or both? Sit down

and brainstorm some ideas for face-to-face interactions (even if it means traveling) that can help you build some bonds. Do not hold out for a single momentous event to solidify a relationship—even small or silly-sounding things can be a good start. Though my library has historically strong relationships, as we began to have new and more liaison-librarians in the reference department, we worked on building understanding using a simple presentation from the head of technical services regarding the lifecycle of a book at our institution. Related to us from the technical services perspective, it was illuminating for both those of us who were familiar with the process as well as those who were new. Choosing this non-controversial but fundamental topic was a low-risk opportunity for liaisons to ask questions and for the head of technical services to figure out what we really understood and what were still points of confusion.

Details

Technical services work is, by necessity, diverse and driven by details. For liaisons, though, the details from so many units can be difficult to keep straight and leave us wondering, “Why do I need to know this? It's such a small thing and not directly related to anything I really do!” Yet, these details, and the nuance that accompanies them, are often important and liaisons will come to recognize their relevancy with time and training. My recommendation, particularly when beginning to train new liaisons, is to quash the impulse to drill down to the bitty bits or to explain the 12 different ways something can be done in technical services. Start relatively big and then get into the details at a point of need for the liaison. It is

true that finessing the level of appropriate detail can be tricky: too little and you are too vague, or you missed imparting valuable information. For example, mentioning only that allocation formulae use seven factors to determine final budgets for liaison funds without providing information on what those factors are and why they were chosen is glossing over details that really affect liaison responsibilities. Including too much information, though—such as why rounding to the .001 was used instead of rounding to the .01—and you may lose your liaison colleagues under the mass of information, and they will never ask you a question again. This is where building a partnership with a specific liaison can help you both figure out what level of detail is appropriate for general distribution, for one-on-one meetings, and for formal documentation meant for liaisons.

Money

Technical services generally includes both collection development and acquisitions. As the units that are most likely to oversee money, from determining allocations to setting spending deadlines to encumbering funds, they share an important relationship with liaisons. However, budgeting and spending may be one of the most difficult things for liaisons to understand. There is a lot of jargon (end of year [EOY] money, rollovers, reversions, etc.), many different players on the budget scene, and a lot of nuance when it comes to allocating money. In our book, my colleague and I tackled budget issues and acknowledged how easy it can be for liaisons to ignore the inner workings of the collections

(continued on page 6)

Reality Check.....→

Minding the Gap

(continued from page 5)

budget, but we also noted the reasons it is critical for them to develop a deep understanding of how the budget works at their particular institution. This, of course, takes a lot of time and patience from everyone. We have had luck with including a healthy contingent of liaisons in our collections advisory committee, which considers budgeting matters, from main budget allocations to cuts to spending of large one-time funds. Once liaisons serve on this committee (a three-year commitment), they have had a chance to immerse themselves in the inner workings in a more thorough and consistent way. Once most liaisons have had a chance to “see how the sausage is made” they have a better understanding of many of the underlying issues and can converse and participate in important budget discussions with a lot more knowledge and help educate their own liaison colleagues. Initiating a new group or changing a group that has not included liaisons before takes work and patience but the result can be forging a collaboration that benefits everyone involved.

The Once-in-a-Blue-Moon Situation

Consider this: a liaison, to function most effectively and efficiently, needs to become familiar with routines, workflows, and situations across many different technical service units. Ideally, after a few years, we gain enough experience through working and collaborating with our technical service colleagues that we can navigate everything easily. However, that does not necessarily happen. Liaisons fall prey to the once-in-a-blue-moon situation, meaning that there are just

some things that we encounter so infrequently that we cannot remember how to navigate it or what we are supposed to do when it happens, unlike technical services colleagues who may encounter this same situation regularly. So, we may ask a technical services colleague the same question each year, year after year. Moreover, technical services colleagues, answering this same question year after year, may become frustrated that they must keep answering the same question. That is the difficulty with familiarity; you forget that anyone else could not remember this one thing. Please do not let resentment fester, though, because nothing degrades inter-unit relationships like resentment coupled with frustration. Instead, dig deep into your own patience and advocate for patience in your unit. Try to identify the most effective way(s) to subvert the inevitable questions before they come and maybe you will find a quick reminder at the beginning of each fiscal year during a liaisons’ meeting with technical services will help. Perhaps an e-mail with an FAQ for handling infrequent situations is best or maybe your unit will just agree to continue to deal with these on an ad hoc basis.

In conclusion, I cannot emphasize enough how important I think technical services is to the effective functioning of library liaisons and how I hope that building stronger relationships between the two areas becomes a primary focus for those practicing librarianship. Liaisons, we can and should work harder to understand our colleagues and their work. To my technical services colleagues, thank you for your patience—here is to better and stronger collaborations in the future.

References

1. Krista Schmidt and Tim Carstens, *The Subject Liaison’s Survival Guide to Technical Services* (Chicago: ALA Editions, 2017). Editor’s note: This book was reviewed in *Technicalities* 37, no. 2 (Mar./Apr. 2017): 22-23.
2. *RDA: Resource Description and Access* (Chicago: American Library Association; Ottawa: Canadian Library Association; London: Chartered Institute of Library Information Professionals, 2010-).

Krista Schmidt is Research & Instruction Librarian/STEM Liaison, Western Carolina University, and can be reached at kschmidt@email.wcu.edu.

This work is licensed under a Creative Commons Attribution-ShareAlike 3.0 Unported License.

