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## The Perfect Storm: Strategies for Weathering Change in Technical Services

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## The Perfect Storm: Strategies for Weathering Change in Technical Services

### Abstract

This paper describes the approach to three simultaneous problems faced by technical services at the College of Charleston Libraries: the retirement of the department head, the outbreak of the COVID-19 pandemic, and the migration to a new library management system.

### Keywords

Technical services, retirement, migration, COVID-19

In March 2020, technical services at the College of Charleston faced an unprecedented upheaval. A “perfect storm” of circumstances converged on the department virtually simultaneously: the retirement of the department head, the outbreak of the COVID-19 pandemic, and the migration to a new library management system. Each of these presented problems to the department and required new approaches to resolve. The retirement of the head of Description & Cataloging Services (DCS), effective just one month prior, reduced staff in the department from 3 to 2, a 33% reduction in departmental headcount that ultimately proved permanent, even though the replacement of that position had been initially planned. COVID-19 restrictions limited access to the library and its collections for even the now-reduced number of staff, necessitating entirely new workflows compatible with brand-new work-from-home environments. In addition to these novel circumstances, the June 2020 migration to Ex Libris’ Alma and Primo shared library service platforms (SLSP), selected by and for the Partnership Among South Carolina Academic Libraries (PASCAL), had long since been scheduled and was approaching fast. This article will detail these concurrent problems, illustrate how they intersected within technical services at the College of Charleston, and describe the various strategies the department used to resolve them.

### **The First Challenge: Retirement of the Department Head**

#### ***Strategies: Consolidation of Departmental Staff, Leverage of New LSP for Streamlining Work***

As a medium-sized liberal arts college, the College of Charleston confronts many of the same challenges facing other schools, both larger and smaller. One of these challenges was immediately apparent in early 2020. Delayed retirement amongst librarians is evidenced by the fact that the 65+ cohort in professional librarianship more than tripled between 2005 and 2015.

(Wilder, 2018). The DCS department head, who had delayed her retirement until she was comfortable with the department's ability to handle the upcoming migration, was a nearly singular source of departmental knowledge. This is consistent with research showing that most library survey respondents agreed or strongly agreed that knowledge of how individual library areas function is concentrated in the minds of one or two key individuals (Siewert & Louderback, 2019).

By the time the department head was ready to retire, DCS had been restructured to include just two full-time employees (from 5 full-time employees and several student employees in 2010): the Metadata Services Librarian and the Rare Books and Manuscripts Cataloging Manager, a long-held paraprofessional position that had previously been part of the Special Collections department. This role was officially transferred to DCS not long before the department head's retirement. Relocation and consolidation of the employees in the department allowed for easier communication and collaboration in person, in addition to the electronic means that would prove vital during the pandemic.

While the libraries initially planned to hire a replacement department head, the position was ultimately eliminated in a restructuring of the library's budget, one of many budgetary changes necessitated by COVID-19. The head of Collection & Content Services (CCS), an Associate Dean for the Libraries, agreed to directly manage the small DCS department as it faced the upcoming migration from Millennium to Alma. In light of the elimination of this position, the recent addition of the Rare Books and Manuscript Cataloging manager to the unit was fortuitous and instrumental in ensuring that the cataloging needs of the institution could

continue without a department head. This position provides backup cataloging support to the Metadata Librarian and prevented DCS from becoming a department of one.

DCS looked forward to the migration, as once the service was properly configured, it offered the potential to automate tasks like reporting and importing. This automation would ideally free departmental time to focus on original cataloging and other work that cannot be automated, like troubleshooting cataloging issues that might arise. While these timesaving opportunities could not replace the lost faculty line, it was one way to recover some of the lost labor in DCS.

Another situation that could not have been envisioned when the department head retired was the outbreak of the COVID-19 pandemic shortly thereafter. COVID-19 restrictions in the library rapidly developed over only a few weeks in March 2020. Physical access to the library was limited to library staff only, with curbside pickup of materials for College of Charleston faculty, staff, and students. Interlibrary loan was paused, along with ordering physical materials. The libraries quickly turned to prefer ordering e-resources, a decision that would become a library policy. E-resources were more readily available from a distance and did not require physical processing or quarantine upon return. Approval plan ordering was also suspended, and this reduction in print materials also eased demands on DCS. As other schools have noted, this change to e-preferred resources altered workflows in technical services, due to the reduction in print materials being received (Khodarahmi & Gregory, 2021). In addition, the libraries also stopped accepting any gifts of books, another decrease in print materials and the work associated with them. By the end of March, nearly all library employees shifted to primarily remote work arrangements, including those in CCS and DCS.

## **The Second Challenge: Remote Work Due to COVID-19 Protocols**

***Strategies: Collaboration Software, Offsite Cataloging and Processing, Expansion of Library***

### ***Assistant's Role***

As remote work plans were quickly arranged, DCS focused on the two most critical projects, preparing data for migration and maintaining the cataloging of physical resources (electronic resources continued to be handled by the Serials and Electronic Resources Librarian). As the migration was the most time-critical project, that was prioritized over cataloging in the initial phase but it was not yet clear exactly what form this work would take. As noted by Adam Schiff of the University Libraries at the University of Washington, "by the time of the COVID-19 pandemic, the amount of experience cataloging departments had with working remotely ran the gamut from none at all to plenty" (Jones, et al., 2020). As at the University of Washington, DCS at the College of Charleston fell into the "none at all" category.

Working on metadata cleanup from home required a computer and VPN access, neither of which were regularly provided to library staff pre-pandemic. It was clear that the careful planning and preparation that would ideally precede a new work situation had been set aside by the necessity of separating individuals to protect public health (Craft, 2020). After discussion with the associate dean, it was decided that the Metadata Services Librarian would take the conference room laptop home, as it was normally only used for projecting presentations and hosting video conferences, neither of which would be necessary or even allowed in the short term.

Before leaving campus for remote work, required programs like Millennium, OCLC Connexion, and MarcEdit were installed on the computer, and requests were submitted to

campus IT to set up VPN access to the Millennium server, vital to pre-migration work. This reconfigured conference room laptop was eventually handed off to another colleague, also pre-migration, for additional Millennium reporting work before access to that system was no longer available. Computers for ongoing use at home were eventually provided by the College for employees who continued to work from home over the summer and beyond. Migration to the web-based Alma and Primo platforms proved useful, as VPN access to the Millennium server was no longer necessary.

DCS continued various metadata clean-up projects from home before migration and moved in-person meetings online. A critical meeting was that of the Group of Five, an ad-hoc committee consisting of the two remaining members of DCS, the Acquisitions and Resource Management Coordinator, as well as the South Carolina Historical Society's (SCHS) librarian and an SCHS volunteer. As the College of Charleston hosts the SCHS catalog, all members of the group needed to be following the same procedures to prepare for migration.

Another library working group that DCS participated in, both in person and then through Zoom, was the Migration Working Group, and later the Description & Discovery Working Group, both of which included staff and faculty members from across the library. While the Migration Working Group carried out instructions directly from Ex Libris to facilitate the migration from Millennium to Alma and Primo, the Description & Discovery Working Group enabled discussion of issues that arose post-migration and cut across several departments, including situations like the handling of course reserve materials in light of COVID-19 restrictions, ensuring the proper display of metadata in Primo, and restructuring the collection of fines and its impact on replacing lost items.

As discussed earlier, even though the libraries had quickly transitioned to an e-preferred ordering policy, there was a significant backlog of physical materials to be cataloged, as they were intentionally set aside until they could be received in Alma, post-migration. To address this backlog remotely, the metadata services librarian arranged to bring home boxes of uncataloged print materials per week. This procedure allowed for cataloging and processing of physical materials offsite, with materials returned to the library the following week and exchanged for additional boxes. The new workflow enabled cataloging and processing work to continue, unlike in other schools where the work of cataloging physical items and maintenance of the physical collection were affected during the closure (Mazur, 2020). This was part of the libraries' efforts to ensure that all services would be available to patrons, even if the buildings themselves were closed, by continuing to provide circulation of materials through the curbside pickup service combined with quarantining of returned materials.

This remote cataloging arrangement required the creation of a cataloging workstation at home. As mentioned previously, a desktop computer was loaned from the College's IT department, and other items were relocated from the office, including a standing desk, chair, a barcode scanner, and all of the necessary processing supplies, including barcodes, security strips, due date slips, stamps and labels, label protectors, and other necessary items. As supplies were used, replacements were obtained during the weekly exchange of backlogged materials.

Work was carefully scheduled to align with new COVID-19-related office occupancy rules that limited the number of CCS employees allowed in the office at any given time. Masks were required, and the office, which was usually open with unlocked doors, was locked, along



with all entrances to the library. This necessitated entering and exiting the library through the loading dock, where boxes of books were exchanged for cataloging. This process, while cumbersome, allowed cataloging work to continue without requiring a physical presence in the library itself.

New workflows were established in DCS. As neither student workers nor volunteers were allowed inside of the library, DCS worked with a part-time library assistant to handle onsite work like shelving of new materials cataloged offsite. As this assistant's time was shared with the Access and Instruction Department, which also had a great need for her help in the initial months of the pandemic, careful planning was required, and goals were established to help keep everyone on the same page. While the library never officially closed, in-person access to the library was restricted to employees only, and all patron services were provided remotely, including requesting books and arranging check-outs for curbside pick-up at the loading dock. The shared library assistant's time was largely taken up with handling these requests, combined with learning the new LSP, as all library employees were. Electronic communication with the library assistant became critical, a change from the typical in-person interactions in DCS. Email and Zoom, a system that the College had been quick to license campus-wide with the move to work from home, became crucial conduits for handling work between DCS and the library assistant. Members of DCS and CCS were also able to communicate more informally through Slack, a business messaging app, utilizing the free limited version that allowed for more informal chat as well as quick work-related questions.

In addition, a new workflow was established that enabled the library assistant to contact faculty members when items they ordered were cataloged and ready for pick up. Normally, the

cataloger would notify the faculty member, but with the new procedures for getting materials, and because the library assistant remained on site where the pick-ups were made, it made more sense for the library assistant to make this contact. The metadata services librarian and the library assistant worked on the language for the notification email together through email, and notifications were made without any interruption. As familiarity with Alma and Primo continued to develop, this workflow was ultimately replaced by automatic email notification through Alma, another timesaving measure employed by the department.

The library assistant was also given greater access to cataloging procedures in the new LMS. Even small tasks, like printing spine labels, something that had previously only been performed by DCS librarians, proved great assistance for quick, onsite book repairs. While the metadata services librarian initially cataloged and processed all new physical materials, after several months, she was able to return the processing work to the library assistant and concentrate on cataloging and ongoing committee work.

This arrangement, while satisfactory, did have some downsides. With the metadata services librarian only in the library once per week, it changed the expectations for “rush orders” and “on-the-fly” catalog corrections. Faculty were notified that rush orders, which had been cataloged, processed, and ready for pickup within one day of receipt prior to COVID, would now take one week minimum from the date of receipt, and that date would likely be pushed back further by ordering and shipping delays outside of the library’s control. Faculty were understanding of these limitations, and the library no longer promises next-day rush processing of received materials.

In much the same fashion, physical items that were mislabeled, damaged, or in need of other attention were left for the metadata services librarian to address at her next weekly visit or to be brought back home for correction. This procedure extended the amount of time these items were not available; if something needed to be addressed more quickly, the library assistant could email or send a Zoom message to the metadata services librarian about it for a more immediate solution.

Cataloging from home and not in the library also presented challenges, in that checking the shelf was no longer easy or quick. If the librarian needed a relatively fast answer, she could reach out to the library assistant to check and report back, or, more commonly, a physical check would be made in person during her next visit. This, again, slowed the cataloging and processing timeframe. Even with these delays, however, DCS was able to maintain the goal of no more than four weeks in physical processing for all new items.

In addition, this system demonstrated a way for DCS to continue work, even at a distance, in the event of other catastrophes, large or small. Charleston, South Carolina, has witnessed many events that closed campus in the recent past, including tropical storms, floods, and even snow and ice storms. Having the ability to carry on with remote work in these circumstances is a boon for the College of Charleston and its libraries.

### **The Third Challenge: Migration to a New SLSP**

#### ***Strategies: Working Groups, PASCAL/Basecamp, Ex Libris Training***

Once the remote work arrangement was solidified, DCS continued the work that the retired department head had initiated in May 2018 to prepare for the migration to Alma. As the College of Charleston is a member of PASCAL, a statewide consortium of academic libraries, it

had agreed, along with 52 other library members, to migrate from an institution-specific instance of a library ILS and join a consortium-wide shared library services platform. This transition from a single, institutional catalog to a networked one required ample preparation, along with a change in mindset from what was best for the College of Charleston's catalog to what was best for a networked catalog used by academic libraries of all shapes and sizes across South Carolina.

The initial planning for metadata migration took place through the Group of Five. Through meetings of this group, first in person, and then over Zoom once remote work began, various tasks were identified and addressed, including ensuring that all bibliographic records had a correct OCLC control number; that all local fields were formatted properly to ensure they would remain as such after migration, that the language of cataloging used was English in all records, that physical descriptions in the 300 field were complete and accurate; and that other requirements given by Ex Libris for the migration to Alma were completed.

The Group of Five set about preparing metadata within the College's catalog for migration in 2018, shortly after PASCAL announced that they had chosen Ex Libris' Alma and Primo products as the shared library services platform. By March 2020, the bulk of the work had been completed, but a few smaller projects remained, such as moving links from MARC field 856 to 956. In addition, statewide training on using Alma and Primo had just begun as the College of Charleston transitioned to remote work.

After completing the final metadata clean-up projects from home, a migration-mandated "tech services freeze" was enacted in late April, at which point no further changes to the catalog could be made. The libraries' data was returned by Ex Libris for review in Alma in

late May, during which time errors could be identified and reported, but no corrections could be made until the actual go-live date of June 1.

Go-live occurred on time as scheduled and was successful. It was also largely unnoticed outside of the library, given the fact that the spring semester had already ended and the library itself remained closed to all but library staff. This relieved some of the stress of correcting the problems identified after go-live, as they were largely unseen by those outside of the library.

Training in DCS continued through online opportunities offered through Ex Libris, ELUNA (the Ex Libris Users of North America user community), and PASCAL, the state-wide consortium that had selected Ex Libris as the shared library services platform. Through this training, DCS staff identified issues that could affect not only the College of Charleston Libraries, but all 53 members of PASCAL now using a shared network catalog, or zone. An error in a network zone record, even if not created or contributed by the College of Charleston, would appear in the College's catalog, and vice versa.

After identifying one of these errors soon after migration to Alma and reaching out to the institution that had contributed the record, the metadata services librarian realized that there was a need for greater communication among catalogers in PASCAL. In fact, in a virtual environment where all meetings and activities happen online, it is just as easy to engage with colleagues in other locations as it is to meet with those from your own institution (Levine-Clark & Emery, 2020). As chair of PASCAL's Cataloging & Metadata Working group, she worked to revisit a proposal the working group had already unsuccessfully made. This proposal, for a separate cataloging discussion board on Basecamp, the project management software used by PASCAL and its members, would hopefully attract catalogers and those with cataloging

responsibilities who might not be participating in the larger, broader discussion board addressing any and all Alma and Primo topics. By committing to share broadly any discussions of interest to all of PASCAL deriving from a Cataloging & Metadata Discussion Board, and to open participation to any interested PASCAL member, the Cataloging & Metadata Working Group was granted permission from PASCAL to create this separate discussion board.

The discussion board allows catalogers and those with cataloging duties, or any other interested PASCAL members, to share problems and questions with each other, and with members of the Cataloging & Metadata Working Group. This discussion board can also be used to disseminate information and announcements, as well as best practices for cataloging in the consortial environment.

While serving on the working group does require a time commitment from the metadata services librarian, the collegiality that it fosters between the College of Charleston and other schools across the state has proven to be a significant help when facing the loss of institutional knowledge that occurred with the retirement of the department head. The time investment is repaid by drawing upon the knowledge of other PASCAL members who have confronted similar problems and situations. By developing relationships with other schools and librarians, the metadata services librarian not only has a larger community to refer to for discussion, but she can also assist other librarians, a part of PASCAL's mission to use collaborative action to support a highly productive knowledge environment.

The lessons learned by Description & Cataloging Services, Collection & Content Services, and the College of Charleston Libraries are now incorporated into everyday practice. DCS has benefitted from the reorganization of staff duties within the library, along with the automation

of certain tasks and reports. Policy changes like adopting e-preferred ordering and declining new gift materials have allowed DCS staff to concentrate on work of greater necessity. Library departments and managers continue to offer much greater flexibility in scheduling remote work options, and employees are now prepared to perform such work, unlike the situation in early 2020. CCS employees, whether working in the office or remotely, can collaborate using programs like Zoom and Slack, which not only facilitate work but also enhance morale, regardless of employee location. The migration to Alma and Primo was ultimately successful, and the staff has become more adept at employing the many online resources available for troubleshooting problems. The fifty-three PASCAL institutions using this shared library services platform are more dependent upon each other than ever before. There is no doubt that DCS has been strengthened by these challenges and the solutions employed to resolve them. Other institutions facing comparable circumstances may want to consider the implementation of similar actions.

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