

# From Problem Solvers to Solution Creators: Shifting Roles of Technical Services

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In the competition for staff and resources, Technical Services is often viewed as a place for potential savings in terms of both cost and time. Can the routine tasks be automated so that they are performed more efficiently? Is it possible to outsource the service to save on costs? Since collection growth is slowing, how vital are the areas that manage the collections? How can processes be streamlined, services improved, staff reallocated, or better decisions made? Technical Services departments have been tasked with providing the same services more efficiently by utilizing fewer staff. Clerical aspects of the work have been automated, consolidated, and outsourced. A study of staffing in the Oberlin Group determined that of the 96 positions eliminated between 2008 and 2012, 82.5 percent were in Technical Services areas.<sup>1</sup> This decline has been experienced across all types of academic libraries.

Various roles found in Technical Services departments have been clearly defined and categorized. Someone is focused on acquisitions, electronic resources, cataloging, metadata, etc. Depending on the size of the department, tasks are often performed by a single person. This creates a silo structure in terms of job responsibilities since there is little to no overlap between employees. In many ways, the department is similar to a jazz band. Each person has an instrument to play which combines to create music; however, the instruments are not interchangeable and the piece of music cannot be played to its full potential without all the parts in place. In a production oriented environment, policies and procedures provide structure and

quality control. There has also been a strong focus on tasks assigned to specific roles and maintaining consistency. Role based permissions in the integrated-library system workflow is one example. The permissions are linked to job responsibilities and allow functionality based on job requirements. Assigning everyone discrete and well defined responsibilities is more efficient and reduces anxiety. Everyone knows what to do and what to expect.<sup>2</sup> Role assignment can also hinder flexibility and creativity. A sense of system lock-down can come from the limitation of the permissions granted and the policies in place, which have been implemented to minimize errors. If this approach results in the need to develop a work-around in order to accomplish basic tasks, then it also hampers innovation. Opening up system permissions could enable more efficient workflows and possibilities. The trade-off is that an employee has the ability to input information which could prove to be incorrect. In reality the risk is minimal. Technical Services work has been categorized as reactive and problem solving. An item is identified as necessary to support the teaching and learning of the campus constituents. The title is purchased, cataloged, and processed, thus making it available to the university community. The combination of consistency, quality control, and assigned roles define the nature of the work. It also creates an impression that innovation is limited by rigid rules and inflexible legacy systems.

Problem solvers focus on individual issues. A question is asked and an answer discovered. It is a

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direct relationship in the form of question to answer. The task can point to a larger issue, but the big picture is not always recognized, or a pattern viewed as emerging. Often the inconsistency is resolved and the matter is considered to be closed. Further investigation is not embarked upon to determine if there are similar occurrences or concerns. Each problem is considered an isolated incident. Usually the issue will need to occur several times in order for any recognition of a potential pattern or a recurring situation. Many traditional library transactions can be classified this way. A patron needs to check out a book and it is checked out at the circulation desk. A directional question is asked and answered at the reference desk. A title is purchased and cataloged. Each is considered an individual action. The steps are repeatable for multiple similar transactions, but the tasks are routinized. New approaches are needed for traditional tasks as libraries transform to meet the changing needs of students. The information age is transitioning to the conceptual age.

Daniel Pink refers to the conceptual age and the need for value creators. Value creators recognize patterns and provide meaning. They supplement technical abilities with “high concept” and “high touch” aptitudes.<sup>3</sup> Outsourcing, an abundance of data, and multiple choices of products and services have shifted workplace needs to the ability to see the big picture and pursue the transcendent.<sup>4</sup> Routine skills can be outsourced or automated. Creators, empathizers, pattern recognizers, and meaning makers are needed.<sup>5</sup> How the book is cataloged is less important than the ability to explain the cataloger’s judgment and decision making. Explaining the “why” leads to a greater understanding of access points (references to author, title, and subject) which in turn assists the ability to find the item. It is necessary to meet expectations and explain outcomes in a way that develops and reinforces a common understanding. Academic libraries, in order to remain relevant, should value innovation, alternative ideas, and questioning why something is done. A cited rule or method is no longer sufficient as the only answer for the approach to a problem. An in-

ventory of the collection is not the sole purpose of the catalog. Subject expertise and technical competency is giving way to adaptability and imagination. Creative thinking is replacing logical thinking.<sup>6</sup> Provocative inquiry rethinks the obvious and best practices from unexpected sources provide unique solutions.<sup>7</sup> It is a change in the workplace approach. Function and role are replaced by possibilities and ideas. There is room for radical change rather than moderate improvements. Departments are defined by need and possibilities rather than current practice. Components of the academic library can be repositioned to add new values and solutions.

Solution creators recognize patterns, anticipate needs, and translate those solutions in a way that can be understood and utilized by faculty, students, and staff. They focus on skill sets and ability rather than rigid roles in the organization and procedures. The shifting library team role also places a stronger focus on soft skill sets. These character traits, attitudes, and behaviors include communication, flexibility, interpersonal skills, and teamwork.<sup>8</sup> Technical Services has traditionally been associated with quantifiable abilities referred to as hard skill sets. Soft skills are character traits, attitudes, and behaviors. Personal qualities, people skills, and career attributes are of equal importance. People skills are interpersonal attributes which characterize one’s relationship with others. Personal attributes include likeability, time management, and organizational skills. Career attributes are communication, teamwork, and customer service.<sup>9</sup> Technical skills will land the interview, but soft skills determine the long term job success.<sup>10</sup> Many Technical Services departments placed greater emphasis on the hard or technical skills and made allowances for weaker soft skills.

Now the library team role of Technical Services has shifted from problem solvers to solution creators. The variety of tools, which facilitate the discovery of resources, are enhanced, maintained, and customized for local requirements. The core areas of responsibility are resource development and discovery. Technical Services librarians understand the mechanics of searching and the organization and quality of data. Re-

corded data combine with the functionality of discovery tools and the catalog to determine how the bibliographic record displays. Understanding the software and cataloging rules lends to a greater understanding of why the information displays as it does.<sup>11</sup> Technical Services departments enhance the tools necessary to locate resources by understanding how they work and customizing them for local constituents. The role is the bridge between understanding how the tools work and how to effectively utilize them.

In addition to a greater emphasis on the soft skill sets, there is a de-emphasis on rigidly defined job responsibilities. Elimination of silos can create a sense of shared responsibilities and teamwork. It neutralizes the sense of ownership and relinquishes control of core responsibilities. As a field, Technical Services has to let go of particulars to capture broader patterns.<sup>12</sup> Restructuring of the department often results in fewer employees, with those employees doing more complex work. The possibility of outsourcing routine tasks is present. This is not an argument for the “good enough” approach, but an argument for focusing on what is possible. It also requires a workforce that is agile, adaptable, and engaged.<sup>13</sup> Tasks are not viewed as stand-alone entities, but instead are placed in the broader context of the overall work of libraries. While the basic principles of material organization and classification remain the same, the discovery methods and tools have changed. The tolerance for a confusing system has also diminished. It is vital that a greater understanding of various tasks occurs and that ownership of tasks is reduced. Rather than identifying with a job, staff members identify with skill sets.

Effective teams learn by doing and focus on results. They are not bound by method and processes and do not become bogged down by rule following and order taking.<sup>14</sup> The substance is more important than the process. It is common in academic libraries to get caught up in the process and procedure and lose sight of the purpose. The emphasis is placed on how something is done rather than on why. Concern is heightened when established practices are not followed, but little thought is given to the overall goal and outcome.

Rules and procedures should not be a detriment to innovation. Willingness to hire staff and define job roles based on a combination of soft skill sets and technical skills should be in place. Moving away from strictly defined job functions to a more general purpose and direction for the academic library can combine like-minded functions rather than maintaining clearly defined departments. It is not a matter of cross training or job sharing. This still maintains the silo and strictly defined areas. It is instead a concerted effort of looking at the organization and determining the skills needed for innovation and discovery. Attention to detail and problem solving are career skills which can create or form a department of solution creators. Knowledge of RDA and Library of Congress Subject Headings are hard skills which maintain a department of problem solvers. The technical expertise is necessary, but it is not the means of achieving innovation. Therefore, soft skill sets are necessary to develop effective working relationships with other library departments and library constituents. A combination of soft skills and solution creation will lead to the sustainability of roles for Technical Services. By asking “why” and “how”, a greater emphasis will be placed on adding value to the discovery environment in terms of the search results and record retrieval.

Interpersonal relationships are critical for effective working relationships across departments. Often people will not admit when they do not understand what is being said, or when they do not have a clear picture of the meaning. Cross departmental relationships build on established trust and heighten the overall awareness of the organization and its services. Peer-to-peer interaction and exchanges develop a common understanding of knowledge and an appreciation for the work of others. Public Services librarians and staff teach students how to search the catalog and discovery tools, but not from the same point of reference as those working in Technical Services. Recognizing basic frameworks and models of discovery will enable all staff members to determine how and why specific search results emerge. Creating a structure which meets retrieval expectations will lead to

sustainable record retrieval in the discovery environment. That structure includes an understanding of how to connect students to the resources they need. It also includes controlled vocabularies, authority files, and effective models for information retrieval. It is dependent on the relationships of the data and the user as well as those who bridge the relationship between effective discovery tools and the education of said tools.

A firm foundation needs to be in place for an environment of solution creators. Creativity, innovation, and the ability to change procedures must be in place. Legacy systems and practices can stifle creativity. Academic libraries are in a state of constant change. Well defined core values, which are in line with those of the institution of higher education, are necessary to maintain relevance. Individuals and their need for established policies and procedures hinder the ability to move the organization forward. It is an inward facing approach that can lead to being caught off guard by change from external forces. This is a detriment to the library and could result in the inability to move beyond the status quo. Critical thinking skills and intellectual curiosity are necessary for student learning and engagement. The development of these skills touches every aspect of the library. It also requires all librarians and staff to have a combination of personal qualities, people skills, and career attributes as well as technical expertise. This combination nurtures creativity and innovation.

An adaptable environment which encourages creativity and focuses on teams rather than silos is necessary to foster the solution creator. Soft skills sets of many librarians and staff in Technical Services departments are transferable and benefit the library as a whole. It would be unfortunate to let past experience dictate the creation of today's library workplace. Pattern recognition and anticipation of need are necessary skills that will enable the academic library to engage patrons in critical thinking and foster the need for intellectual curiosity. Shifting from problem solvers to solution creators will lead to the sustainability of roles in Technical Services departments.

## Notes

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