Factors Influencing Competency Perceptions and Expectations of Technical Services Administrators

Norm Medeiros
Coordinator, Bibliographic & Digital Services
Haverford College
nmedeiro@haverford.edu

A published version of this paper appears in the 49:3 (2005) issue of *Library Resources & Technical Services*.

ABSTRACT

This study investigates the factors that influence perceived and expected daily task competencies for technical services administrators; that is, the competencies technical services administrators claim to possess (perceived) and those they believe they ought to possess (expected) in the areas of acquisitions, cataloging, and serials. For the purposes of this paper, a technical services administrator is one who oversees, at a minimum, the acquisitions, cataloging, and serials units in her library. The author surveyed 116 technical services administrators via email in Fall 2003, receiving a response rate of 54% and an acceptable use rate of 53%. The survey was designed to correlate perceived and expected competencies with (1) an incumbent's professional background; (2) tenure in current position at present institution; and (3) size of technical services unit as measured in full-time equivalents (FTE). The study concludes that incumbent tenure and size of the technical services unit affect both perceived and expected competencies, with the latter having a greater effect. Professional background affects competency possession, but has only a marginal effect on competency expectation. The findings reveal that administrators with ten or more years in their current positions, who have non-cataloging backgrounds, and who have at least ten FTE in their technical services units are *least likely to know* the daily procedures of their technical services units. Administrators with ten or more years in their current positions, who have cataloging backgrounds, and who have at least ten FTE in their technical services units are *least likely to feel they ought to know* the daily procedures of their technical services departments. These administrators are also least likely to have responsibilities that fall outside of technical services.

INTRODUCTION

"Leadership begins where management ends," contends Donald Riggs in his excellent essay, "Leadership versus management in technical services"[1]. Riggs juxtaposes a technical services *manager* who is concerned with procedural "know-how," and a technical services *leader* who is concerned with procedural "know-why." Riggs concludes, "Leaders, not managers, will move technical services into the twenty-first century."[2] The study that follows is the result of the author's interest in learning what perceptions counterparts held towards their roles, specifically how much hands-on "know-how" they possessed and believed they should possess to successfully administer their departments. This study is intended as only a prima facie glimpse of

the responsibilities and attitudes of those surveyed. Speculations based on the survey results are meant to encourage further investigation in this area.

LITERATURE REVIEW

Besides Riggs' essay, there have been surprisingly few papers published within the last 20 years that address technical services management, and only a smattering of these that pertain to the role of the administrator. As one would expect, many of these management papers focus on organization of technical services, especially due to changes resulting from automation. Christian Boissonnas offers such a piece, which describes the changes to Cornell's technical services organization[3]. Boissonnas discusses Cornell's self-study that eventually yielded a less-hierarchical organization. The restructuring resulted in greater delegation to and authority for department heads, which served to increase the flexibility of the technical services unit as a whole. Leslie Manning describes how differing organizational structures affect a manager's accomplishments[4]. Manning details the technical services organizational charts for various university and public libraries, illustrating the many ways divisions can be organized to achieve their goals. Manning relates management with organization, and recognizes that planning, communication, and specialized knowledge are important criteria for a technical services administrator. Bloss and Lanier point to flexibility as a leading cause of reorganization within technical services departments[5]. They argue that middle managers will soon have greater influence for coordinating activities between departments, staff mentorship, and providing new ideas to their units, rather than their traditional procedural responsibilities. Allen and Williams point to technology as the driving force behind technical services reorganizations[6]. They consider physical changes necessitated by desktop computers as a force behind changing workflows. Like articles mentioned earlier, these authors consider flexibility a key resultant from such organizational changes, though they don't state how these changes affect the supervisory role of the technical services head. Gleason and Miller argue for a move towards a "technical services coordinator" rather than the more traditional "assistant director for technical services"[7]. The authors contend that positions of assistant director unnecessarily mirror roles played by the director. Further insinuating another management layer between unit heads and decisions is wasteful and unnecessary, the authors maintain, especially given management theory that touts low-level decision-making as being most successful. A technical services coordinator is more apt to keep the bigger picture in mind, making sure interdepartmental processes flow effectively. The authors further argue that organization and facilitation skills are more important than a strong technical services background, since such a background could cause the coordinator to intrude upon department head decisions. Younger and Gapen offer a historic perspective on technical services divisions, and like Gleason and Miller, note the differences between coordination and direction[8]. They contend that libraries are moving away from a hierarchical centralization of traditional technical services departments under an associate director, and into organizations where the department heads are vested with authority for their units Accepting Gleason, Miller, Younger, and Gapen's contentions, what competencies are appropriate for a technical services administrator today?

METHODS

An electronic survey was distributed to 116 technical services administrators during Fall 2003 (see Appendix). The survey response rate was 54%, with an acceptable use rate of 53%. Survey recipients were chosen at random from the *American Library Directory* (Bowker, c2004). Surveys were distributed to an even number of administrators at large (15,000+ students), medium-to-large (10,000-14,999 students), small-to-medium (5,000-9,999 students) and small (fewer than 5,000 students) institutions. The survey scope was limited to three traditional technical services areas: acquisitions, cataloging, and serials. The survey asked:

- the respondent's tenure as technical services administrator at her present institution
- the respondent's professional background prior to becoming a technical services administrator
- the respondent's ability to perform daily tasks in each of the three departments
- the degree to which the respondent felt she *should* have the knowledge to perform daily tasks in these units
- additional responsibilities the respondent held in the library (eight options were listed: archives / preservation, bibliographic instruction, collection development, computer hardware / software administration, digital projects, reference desk, web development, and "other")
- comments on the changing nature of the respondent's position

The survey was designed to measure the effects of professional background, incumbency tenure, and departmental staffing on perceived and expected competencies. The rate of other responsibilities was measured, though considered neither an independent nor dependent variable since knowing whether these rates were causal or resultant cannot be readily determined.

An inherent problem with the survey discovered during analysis of the results was the lack of questioning as to why a respondent felt she ought to possess procedural competency in a given area. Since it's possible, likely even, that some respondents answered affirmatively because they do not have a professional librarian in a particular department, an "adjusted expectation rate" was included in the results. The adjusted expectation removes affirmative answers from the equation when a department does not have a professional FTE within it. As an example, if 10 of 30 respondents claim they ought to know the daily procedures of the serials department, and 5 of these 10 affirmative-responding administrators do not have a professional FTE in their serials departments, these 5 affirmative results are excluded as part of the adjusted measurement. The result, in this example, is an adjusted expectation rate of 20% (5 of 25) compared to an unadjusted rate of 33% (10 of 30). Clearly, future studies must seek to learn the reasons behind expectation responses.

RESULTS

The responses reflect the equitable demographic distribution of the survey. Of the 61 acceptable responses, 20 were from large institutions, ten from medium-to-large

institutions, eleven from small-to-medium institutions, and 20 from small institutions. The results draw on three independent variables: professional background, incumbent tenure as technical services administrator at her current institution, and combined number of FTE in the respondent's technical services division. The rate of other library responsibility was measured. As mentioned above, an adjusted expectation rate based on availability of at least one professional FTE in each department was also included. This adjustment takes into account the possibility a technical services administrator would express expectation of daily task competency to offset not having a professional librarian in a particular department.

The first study compared the perceived and expected competencies of technical services administrators with a cataloging background versus those with a background other than in cataloging.

PROFESSIONAL BACKGROUND		
	non-cataloging	cataloging
Perceived competency of acquisitions daily tasks	51.72%	53.13%
Expected competency of acquisitions daily tasks	37.93%	34.38%
Adjusted expectation based on professional FTE in acquisitions dept.	31.03%	18.75%
Perceived competency of cataloging daily tasks	55.17%	81.25%
Expected competency of cataloging daily tasks	31.03%	43.75%
Adjusted expectation based on professional FTE in cataloging dept.	27.59%	40.63%
Perceived competency of serials daily tasks	51.72%	59.38%
Expected competency of serials daily tasks	27.59%	31.25%
Adjusted expectation based on professional FTE in serials dept.	20.69%	15.63%
Overall perceived competency rate	52.87%	64.58%
Overall expected competency rate	32.18%	36.46%
Overall adjusted expected competency rate	26.44%	25.00%
Other responsibilities		
Archives / preservation	27.59%	18.75%
Bibliographic instruction	17.24%	15.63%
Collection development	68.97%	56.25%
Computer hardware / software administration	31.03%	34.38%
Digital initiatives	24.14%	18.75%
Reference desk	37.93%	28.13%
Web development	20.69%	18.75%
Other	34.48%	28.13%
Rate of other responsibilities	32.76%	27.35%

The perceived and expected competency rates for acquisitions show little difference. After adjustment, administrators with a non-cataloging background expect to have significantly greater competency, perhaps since 34% of these administrators have a background in acquisitions. By comparison, 52% of respondents identified themselves as having a cataloging background, 7% identified themselves as having a serials background, and 7% identified themselves as having a background outside of technical services. Perceived and expected competency values are greatest in the area of cataloging. Even after adjustment, 41% of administrators with a cataloging background felt they ought to have daily task competencies, revealing perhaps, an ownership urge for cataloging-related activities in their libraries. In the area of serials, administrators with a cataloging background have greater competency in this area, perhaps due to cross pollination of serials and cataloging. The adjusted expectation rates, however, are fairly equal between administrators with cataloging and non-cataloging backgrounds.

The overall perceived competency rate for administrators with cataloging backgrounds is significantly greater than for administrators with non-cataloging backgrounds, attributable to the very high perceived competency rate (81.25%) in the area of cataloging. Even though the majority of administrators with non-cataloging backgrounds have backgrounds in acquisitions, the same high perceived competency rate does not exist in the acquisitions area. This may mean that administrators with a cataloging background retain and continue to develop their cataloging skills at a level appropriate for front-liners, whereas the same may not be true for administrators with an acquisitions background. The overall expected competency rates are much closer for the non-cataloging and cataloging backgrounds, and the adjusted rates are closer still. With the exception of computer hardware/software administration, technical services administrators with non-cataloging backgrounds are more involved in other library operations. Such involvement outside of technical services may encumber more of their time, leaving less to apply towards the daily tasks of their technical services units. This involvement may be one cause for the lower perceived competency rates for administrators with non-cataloging backgrounds when compared to those with cataloging backgrounds.

The second study compared perceived and expected competencies of respondents with ten or more years as technical services administrator at their current institutions, versus those administrators with fewer than ten years of tenure as administrator at their current institutions.

TENURE AS TECHNICAL SERVICES ADMINISTRATOR AT PRESENT INSTITUTION		
	At least 10 yrs.	Fewer than 10 yrs.
Perceived competency of acquisitions daily tasks	50.00%	54.29%
Expressed expected competency of acquisitions daily tasks	26.92%	42.86%
Adjusted expectation based on professional FTE in acquisitions dept.	15.38%	28.57%
Perceived competency of cataloging daily tasks	61.54%	74.29%
Expressed expected competency of cataloging daily tasks	34.62%	40.00%
Adjusted expectation based on professional FTE in cataloging dept.	30.77%	37.14%
Perceived competency of serials daily tasks	53.85%	57.14%
Expressed expected competency of serials daily tasks	23.08%	34.29%
Adjusted expectation based on professional FTE in serials dept.	15.38%	20.00%
Overall perceived competency rate	55.13%	61.90%
Overall expressed expected competency rate	28.21%	39.05%
Overall adjusted expected competency rate	20.51%	28.57%
Other responsibilities		
Archives / preservation	26.92%	20.00%
Bibliographic control	11.54%	20.00%
Collection development	61.54%	62.86%
Computer hardware / software administration	34.62%	31.43%
Digital initiatives	19.23%	22.86%
Reference desk	19.23%	42.86%
Web development	11.54%	25.71%
Other	30.77%	31.43%
Rate of other responsibilities	26.92%	32.14%

Administrators with fewer than ten years of experience in their current positions expressed greater perceived and expected competencies for tasks within each of the three departments. One wonders if this greater competency percentage is attributable to these administrators being more recently removed from the trenches, and therefore still maintaining skill sets even after moving into their current administrative positions. Alternatively, perhaps the administrators with more than ten years of experience recognize a need on their part to remove themselves from the daily tasks of their units in order to focus on other issues. Since a number of respondents indicated that personnel / human resources issues were a significant source of time expenditure for them, it is likely that these more senior administrators are having such responsibilities

placed on them. Curiously, the rate of other responsibility was a bit higher for administrators with fewer than ten years as technical services administrator, perhaps substantiating claims of a generalist trend among newer librarians.

The third study compared the perceived and expected competencies of technical services administrators with ten or more FTE in their divisions versus those administrators with fewer than ten FTE in their divisions.

FTE IN TECHNICAL SERVICES DIVISION		
	At least 10	Fewer than 10
Perceived competency of acquisitions daily tasks	36.67%	67.74%
Expressed expected competency of acquisitions daily tasks	20.00%	51.61%
Adjusted expectation based on professional FTE in acquisitions dept.	20.00%	29.03%
Perceived competency of cataloging daily tasks	53.33%	83.87%
Expressed expected competency of cataloging daily tasks	16.67%	58.06%
Adjusted expectation based on professional FTE in cataloging dept.	16.67%	51.61%
Perceived competency of serials daily tasks	50.00%	61.29%
Expressed expected competency of serials daily tasks	26.67%	32.26%
Adjusted expectation based on professional FTE in serials dept.	20.00%	16.13%
Overall perceived competency rate	46.67%	70.97%
Overall expressed expected competency rate	21.11%	47.31%
Overall adjusted expected competency rate	18.89%	32.26%
Other responsibilities		
Archives / preservation	26.67%	19.35%
Bibliographic control	13.33%	19.35%
Collection development	50.00%	74.19%
Computer hardware / software administration	36.67%	29.03%
Digital initiatives	26.67%	16.13%
Reference desk	13.33%	51.61%
Web development	23.33%	16.13%
Other	36.67%	25.81%
Rate of other responsibilities	28.33%	31.45%

The contrast between these two groups is stark, though not surprising. With the exception of the adjusted serials expectation rate, administrators with fewer than ten FTE in their technical services units possessed considerably greater daily task competency, and felt they ought to possess such competency. The fewer staff to which duties can be delegated no doubt forces technical services administrators from smaller

libraries to maintain more hands-on expertise. These administrators are no less active in non-technical services areas in their libraries when compared to administrators who oversee technical services units with ten or more FTE. Examining responsibility rates for activities outside of traditional technical services areas reveals that administrators at smaller institutions as a group are more actively involved in collection development and reference work, whereas administrators at larger institutions as a group are more actively involved in digital initiatives, archives / preservation, and web development.

DISCUSSION

The comments of numerous respondents indicate that technical services administrators are spending significantly more time on management issues in their libraries today than in years past. Some of the comments that indicate this trend are:

> "*My position has become much more managerial*"
> "*More time is devoted to working upward with library administrators*"
> "*The primary change has been less involvement in operations and more in administration*"

Technology is also noted as a reason for a decline in daily task competencies. A number of respondents commented on the ways technology has left them less knowledgeable about the daily work in their units. Some of these comments are:

> "*Technology has made jobs in cataloging, acquisitions, and serials much more specialized*"
> "*Computerization has led me to become less knowledgeable in the details of day to day procedures*"
> "*Most tasks are now computer-related and it is very time-consuming trying to keep up"*

Given these comments, one can infer administrators with ten or more years in their current positions have significant managerial responsibilities that often take them away from the daily work of their unit. More senior administrators who are also among the subgroup having units with ten or more FTE have likely vested responsibility with department heads in order to free time towards managerial needs. Thus, little need exists for these administrators to maintain task competency. Moreover, since task competency requires proficiency with ever-changing technologies, it may not be a stretch to believe that less senior administrators are more familiar with these technologies, and as a result are better able to maintain daily task competencies. Equally important to this investigation are administrators' views on whether they ought or ought not possess departmental task competencies. To this end, professional background does not appear to be a factor in expected competency. It seems clear, however, that position tenure and FTE do affect expected competencies, with the latter being a more significant factor. It is possible administrators with ten or more years in their positions may, by this point in their tenure, have assumed administrative responsibilities within their libraries and / or campuses that necessarily require them to spend less time on the daily activities of their technical services units. It may also be the case that these administrators, who have sufficiently large technical services units,

recognize the value is delegating responsibility to department heads. Administrators with fewer than ten years in their positions, on the other hand, may not yet be vested with the same administrative responsibility within their libraries and/or campuses. Administrators with fewer than ten FTE in their units are often part of the regular work force, and therefore more easily maintain, and feel they ought to maintain, the skills necessary to contribute to their technical services departments.

CONCLUSION

Future study must determine why administrators feel they ought to know daily departmental tasks. Including such a question would control for cases where administrators feel responsible for task competencies because no professional librarian resides within the department. Additionally, more detail about the time spent managing, coordinating, and collaborating within one's library and/or campus will provide a more complete picture of the pressures placed on administrators' time. Investigating outcomes of the varying attitudes towards competency possession and expectation would perhaps offer a glimpse into the success of particular administrative styles. Including such an assessment component may contribute to professional development for new or aspiring technical services administrators.

WORKS CITED

1. Riggs, Donald E. "Leadership versus management in technical services," in *Developing leadership skills: A source book for librarians*, eds. Rosie L. Albritton, Thomas W. Shaughnessy. (Englewood, CO: Libraries Unlimited, 1990), 226-235.

2. Ibid.

3. Boissonnas, Christian M. "Managing technical services in a changing environment: The Cornell experience." *Library Resources & Technical Services* 41, no. 2 (1997): 147-154.

4. Manning, Leslie A. "Technical services administration," in *Library technical services: Operations and management*, ed. Irene P. Godden. (Orlando: Academic Press, 1984), 249-259.

5. Bloss, Alex, and Don Lanier. "The library department head in the context of matrix management and reengineering." *College & Research Libraries* 58, no. 6 (1997): 499-508.

6. Allen, Nancy H., and James F. Williams. "The future of technical services: An administrative perspective." *Advances in Librarianship* 19 (1995): 159-189.

7. Gleason, Maureen L., and Robert C. Miller. "Technical services: Direction or coordination?" *Technical Services Quarterly* 4, no. 3 (1987): 13-19.

8. Younger, Jennifer, and D. Kaye Gapen. "Technical services organization," in *Technical services today and tomorrow*, 2nd ed., ed. Michael Gorman. (Englewood, CO: Libraries Unlimited, 1998), 165-181.

FURTHER READING

Association of Research Libraries. *The Assistant/Associate Director Position in ARL libraries*, ed. Allen B. Veaner. (Washington, DC: Office of Management Studies, Association of Research Libraries, 1984).

Bishoff, Liz. "Managing technical services in the small library." *Library Resources & Technical Services* 29, no. 2 (1985): 118-124.

Howley, Pamela C. "Change and adaptation in the technical services of a group of mid-sized academic libraries: A 14-year overview," in *Innovative redesign and reorganization of library technical services: paths for the future and case studies*, ed. Bradford Lee Eden. (Westport, CT: Libraries Unlimited, 2004): 53-78.

Lucas, Ann. *Strengthening departmental leadership*. (San Francisco: Jossey-Bass Publishers, 1994).

New directions in technical services: trends and sources (1993-1995). (Chicago, IL: American Library Association, 1997).

Plate, Kenneth Harry. *Middle management in university libraries: the development of a theoretical mode for analysis*. (Thesis (Ph.D.) Rutgers University, 1969).

Technical Services Management, 1965-1990: a quarter century of change and a look to the future, eds. Kathryn Luther Henderson, Linda C. Smith, Ruth C. Carter. (New York: Haworth Press, 1996).

Stenstrom, Patricia F. "Current management literature for technical services." *Illinois Libraries* 69, no. 2 (1987): 96-103.

Stueart, Robert D., and Barbara B. Moran. *Library and information center management*, 6th ed. (Greenwood Village, CO: Libraries Unlimited, 2002).