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ABSTRACT
        This report discusses the planning and implementation
of the holistic librarian concept (i.e., the integration of public
and technical services) at the McFarlin Library at the University of
Tulsa (Oklahoma). The use of automation in the university libraries,
which made the changes possible, and the total reorganization of the
structure of work routines and administrative structure are
described. The planning process that preceded implementation, the
approach to a division of labor, training existing staff and hiring
new staff to fit the new scheme, the participation of
paraprofessionals, supervisory issues, and future plans are among the
topics covered. Brief descriptions of holistic approaches at other
academic libraries are included. (Contains 22 references.) (KRN)

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INTEGRATION OF PUBLIC AND TECHNICAL SERVICES

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INTEGRATION OF PUBLIC AND TECHNICAL SERVICES

ABSTRACT

The study and implementation of the concept of "holism" and how librarians can introduce non-traditional operating modes has been pursued in McFarlin Library at The University of Tulsa. Such a dramatic change is often threatening and requires a great deal of planning. In addition, the introduction of the concept of the holistic librarian into a work routine can consume a great amount of time. The use of automation in the University Libraries permitted the total reorganization of the structure of work routines, including the introduction of holism, and the administrative structure within the main library. Automation has continued to permit the library's organization to evolve even further since this report was prepared in the spring of 1992.

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INTEGRATION OF PUBLIC AND TECHNICAL SERVICES

INTRODUCTION

Many people dislike reading "how I done it good in my library" papers. If you are one of these, please bear with me while reading this paper because I believe that this is the best format to describe the changes within McFarlin Library at The University of Tulsa. The implementation of the holistic librarian concept was an outgrowth of the introduction of automation. Holism was introduced and pursued without major disruptions to the users and the volume of work accomplished.

Such change in libraries is often a traumatic experience. But with adequate planning, participation of the staff, and adequate communication it can be accomplished. My primary purpose is to show that the concept of the holistic librarian (or the integration of public and technical services) can be an appropriate one to follow the implementation of automation in mid-sized academic libraries and not just for small public, academic, and school libraries or some of the largest academic libraries.

First, however, I must remind you that even with non-traumatic changes, not everyone accepts what is being proposed. In addition, a concept such as that of the holistic librarian, although controversial, is not new to academic libraries.

What this presentation elaborates upon is the nature of what a librarian does. Librarians, originally and today in small libraries, have provided all the activities necessary to make a collection of information available for use -- acquisition, cataloging, processing, shelving, reference, etc. For various reasons the staff in some libraries felt a need for the division of labor as the most expedient use of staff time and this may have been the best means of getting the work done when using card catalogs where the work on the catalog was often performed behind the scenes and only patron services were visible to the users.

We must now rethink our staffing needs instead of continuing with what has been the common practice of separation of duties in the provision of service and the processing of materials. This concept of integrating both behind the scenes activities and patron service activities has been referred to in the literature as the renaissance librarian[1], the ecumenical librarian[2], and more commonly the holistic librarian[3] as it is referred to at The University of Tulsa. The term "holistic" when applied to

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[1]Eskoz, Patricia A., "Catalog Librarian and Public Services-A Changing Role?" LRTS, v. 35, n. 1 (January 1991): 77.

[2]Gorman, Michael, "The Ecumenical Library," The Reference Librarian, 9 (Fall/Winter 1983): 55.

[3]Hoadley, Irene B., "The Role of Professionals in Technical Services," Technical Services Quarterly, v. 6, n. 2 (1988): 14.

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professionals was not original to Tulsa but was selected as the best one for our structure.

REPORT

In 1982 the university's Director of Libraries hired an Associate Director of Automation/Coordinator of Technical Services with the intent of selecting, installing, and implementing an automated integrated catalog. The Library Information Access System (LIAS) used at Pennsylvania State University was selected in 1983 because of its use of the Honeywell (now Bull) mainframe and LIAS' features and development plans.

With the introduction of this system and the preparation for its use, a progression of reorganizations took place, first within Technical Services and later in Public Services. Among the first changes at the time of the introduction of the opac into the library was the restructuring of the copy cataloging unit into one consisting primarily of paraprofessionals reporting to a professional. Meanwhile the automated catalog was installed in the fall of 1984 and circulation followed in the fall of 1986. During this period from selection to installation, training took place on the use of LIAS cataloging procedures, the numbers of professionals in the main library were reduced due to budgetary restraints, and the numbers of services and users skyrocketed.

One idea, that had intrigued both the former Associate Director for Automation and me was the concept that catalogers had much to offer in the provision of services to the users and the reference librarian had much to offer cataloging. The former part of this concept has been implemented at one time or another in such libraries as the Edmon Low Library at Oklahoma State University, Southern Illinois University campuses, and prior to 1982 at McFarlin Library where the catalogers provided reference assistance on weekends. The corollary of this exchange is that reference librarians have much to offer cataloging as a result of their knowledge of the ways in which patrons seek information. This participation was seldom permitted. In addition an automated environment has permitted access to cataloging activities to any authorized person wherever terminals or pc's are available. The question arose in the library, "Why couldn't the reference librarians participate in cataloging?"

I must add, I am not advocating the total disregard of cataloging conventions and rules for the sake of holism. What I am advocating is the expansion of the catalog record as it is today with the addition of notes and tracings that are designed to serve the needs of the local user. The core bibliographic record and other access points, such as classification, must be maintained according to standards for the purposes of resource sharing with other libraries. However, one of the driving ideas behind holism is that many of us believed that access should not be restricted to only standardized points. In addition, determining such things as what library guides, authority records, cross references, on order records, and non-TU libraries' catalog entries could and should be in the catalog should include input from all professionals.

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Commonly agreed upon conventions and rules are needed to maintain standardized access.

Tulsa's idea in implementing holism was modeled after, on a small scale and without subject divisions, that found at the University of Illinois at Urbana-Champaign and at Pennsylvania State University. At Illinois the introduction of LCS as the circulation system and brief record catalog and later the introduction of FBR (Full Bibliographic Record) permitted the restructuring of the library. Cataloging would take place at the point of use, not behind the scenes. Most professional catalogers with the exception of the principal cataloger and head of copy cataloging were transferred from technical services to the various subject libraries. Reference librarians were trained to catalog according to the standards of the processing department.

A major factor in our favor at The University of Tulsa for implementing such a transformation was the Director of Libraries. He supported and continues to support the idea that a professional should be permitted to participate in all professional level activities and encouraged to do so.

At this point in our discussions, I attended a conference at Illinois State University in the spring of 1987 held by MALC (Midwest Academic Library Conference). The topic of this two and one-half day conference was the holistic librarian. Advocates of this idea, such as Michael Gorman, now Director of Libraries at California State University at Fresno and formerly Director of General Services at the University of Illinois; Evan Farber, Director of the Earlham College Library; and JoAn Segal of ACRL spoke to this point.

Upon my return and the presentation of a brief summary of the conference to the director and the professional staff, a task force was created to study the introduction of this idea into McFarlin Library. The group consisted of the Head Cataloger; the Coordinators of Public Services, Technical Services, and Collection Development; a reference librarian; and the Assistant Curator of Special Collections. The group's charge was to gather published information, to investigate all possibilities, discuss the idea with the staff, and to make a report before the end of the 1987-88 academic year.

This Integration of Services Implementation Group (ISIG) prepared a report and submitted it to the director for his approval. The report included a survey of the situation, including the delineation of the shortage of staff, consideration of the already accomplished move of a cataloger to reference, and the hiring of both an Assistant Curator of Special Collections and a reference librarian whose positions had become holistic in nature. The intent in hiring these last two people was that they would perform patron services and cataloging. ISIG also recommended an outline for training new staff and cross-training existing staff, evaluation at the end of the calendar year, and finally called for the consideration of the redistribution of reporting lines.

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One of the major drawbacks to holism, in the discussions of the group, was the matter of supervision. Some individuals who had previously been solely responsible to one person found it difficult to suddenly be responsible to more than one person. Another issue was that an individual librarian can fail to develop expertise in a single area if placed in a position where their time is strictly structured thus not permitting spending an adequate amount of time in the area most in need of development.

The intent of this integration was not to make everyone a "jack of all trades, a master of none" but to provide individuals the opportunity to participate in professional activities as well as to permit them to develop a specific skill(s) to a significant level of proficiency. Some disagreement existed among the staff about how a person's time was to be allocated. Initially, an even split between traditional processing and reference activities was permitted but this evolved into a situation where each professional's time was divided as needed in order to accomplish the required tasks. The premise was that a professional can be a good or even an expert cataloger or reference librarian, in the traditional sense, and, if left alone to work out the division of labor that best fits them, can also be a good professional in areas where they are not an expert.

With the director's acceptance of the report and the transformation of the ISIG from a task force to one overseeing implementation of the concept, the director announced a reorganization of the library's administrative structure. The former Associate Director for Public Services and Collection Development became the Associate Director for General Services. This move placed all operational units, including Special Collections, Technical Services, Public Services, and Collection Development under one person. The Associate Director for Automation/Coordinator of Technical Services became the Associate Director for Automation. In addition, in an attempt to help the staff think along different lines, Public Services was renamed Library Information Services and Technical Services became Processing Services. A Coordinators' Council was also created. The Coordinators of Processing, Collection Development, Information Services, and the Curator of Special Collections were members of this group. It was chaired by the Associate Director for General Services who oversaw the operation of McFarlin Library. The purpose of the Council was to assist in the oversight of the activities in McFarlin Library and to propose and recommend policies to the Director of Libraries.

Beginning in June 1988, the training of new staff and the retraining of existing staff began and the administrative reorganization became effective. Several professional staff have been hired when holistic vacancies have become available. Each time a position was advertised, it was made quite clear that the person hired will be performing both traditional reference and catalog responsibilities. We had as many as twenty-six applicants for our positions and at an advertised salary often at least only three quarters of the national average for academic librarians.

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When interviewing the prospects, a common statement was that they applied because of the appeal of this type of position. Of 12.5 FTE professional librarian positions who were not part of the senior library administration, 8.5 of the positions were "holistic." With a change in the bibliographic instruction position the current instruction librarian inputs library guides onto the OPAC. This professional was trained on the procedures for creating bibliographic records thus increasing the number of holistic librarians to 9.5 FTE. Some engage in original cataloging whereas others only do editing of records or similar activities.

Since 1988, we continued to revise the Processing Manual, devised additional LIAS training materials, developed a manual for reference activities, and maintained them. Several paraprofessionals now participate in a manner similar to that of the professionals; they provide patron assistance as well as process materials. The interesting fact here is that the paraprofessionals were partially holistic prior to the introduction of the holistic librarian concept. Copy catalogers assisted in preparing reserve materials, a traditional public services activity in our library, and reserve room staff, as well, had been inputting cataloging information for the reserve collection. Circulation staff had, for five years, created item records for materials that had not yet been barcoded, a task which in many, if not most, academic libraries, is reserved to the technical services staff.

In addition, the organization of the library has continued to evolve. At the time of the implementation of holism, the university libraries suffered another reduction in staff, including the loss of the position of Associate Director for Automation; use continued to increase; and the budget remained stagnant, at best. The Coordinators' Council created at the time of the introduction of holism evolved into a smaller McFarlin Administrative Council and consisted of the Director of Libraries, the Associate Director for General Services, and the Coordinators of Library Information Services and Processing Services.

Supervision of professionals continued to be a point of confusion. Not only have some professionals had difficulty in organizing their time in an effective manner while reporting to two supervisors, but supervisors have had difficulty in developing supervisory skills where cooperation with another supervisor of the same individual is involved. This issue will be examined when the discussion of line and staff responsibilities of various professionals takes place. Continued efforts will take place to further "flatten" the organization structure and, in particular, to bring the middle management and some of the senior management further into the realm of holism. It has also been suggested, as was originally intended, that any look at the further development of holism should include an examination of ways in which to eliminate formal divisional lines.

The changing of the names of activities with the intent of breaking down those barriers did not succeed as hoped in spite of the fact that both professionals and paraprofessionals now work in both of the traditional divisions. Another issue to be discussed

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is what is appropriate for professionals to do in the way of processing materials. This will involve the discussion of whether or not professionals should edit catalog copy when insufficient amounts of time do not permit professional level cataloging of many other materials.

Another outgrowth of this integration has been the recent statement by the Director of Libraries that due to continued budget constraints, anticipated increased use (following a 49.2% increase in the use of services from 1988-1991), and no likelihood of additional staff, holism must be strengthened. The director further stated that "any changes in the structure of holism that will be considered must favor strengthening public service points " [but yet maintain routine processing activities] and that he considers "LIAS to be a cornerstone of our public service program." (Before anyone jumps to the conclusion that he [the director] must have been a public services or at least a reference librarian, I must state that the Director of Libraries was a cataloger before becoming an administrator.)

I do not want to end this paper leaving you with the idea that what has been accomplished has been without some significant challenges. The issues of supervising distributed staff and sharing supervisory responsibilities have been and continue to be challenges. However, the integration of traditional library activities provides an individual librarian the opportunity to become more fully involved in a wider array of activities in a library.

CONCLUSION

What does this mean for this library and for other libraries? First, with adequate planning, major organization changes can be accomplished. The use of a modified strategic planning process made this activity more manageable. Participation in planning by all professional staff must be mandatory, not in the sense of mandatory for all staff on all issues, but from the standpoint that any professional may and have been called upon to examine various issues. Without participation, change is often delayed by the staff, if not made impossible.

Communication on the part of all persons involved in either administering or developing procedures for change is a must in order to proceed in the integration of services. Professionals must be offered the opportunity to develop their complete realm of skills, yet permitted to excel in specific ones. Continued reexamination and development of the concept must take place as a routine activity. Last, but definitely not least, an automated catalog/circulation system must be in place in order to make this concept viable in a mid-sized academic library.

HOLISTIC CHANGE IN ACADEMIC LIBRARIES

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