Eastern Kentucky University

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OVGTSL 2023: Ongoing Challenges, Creative Solutions

Conference Schedule

OVGTSL 2023 Conference Program

Eastern Kentucky University

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ONGOING CHALLENGES, CREATIVE SOLUTIONS



EASTERN KENTUCKY UNIVERSITY LIBRARIES RICHMOND, KY MAY 17-19, 2023

CONFERENCE WEBSITE: HTTPS://ENCOMPASS.EKU.EDU/OVGTSL2023

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Thank you to KLA for letting OVGTSL use their zoom account to support the virtual conference option!



Welcome to the OVGTSL 2023 Conference

The OVGTSL 2023 Officers and Conference Planning Committee welcomes you to the conference at Eastern Kentucky University Libraries in Richmond, KY. As highlighted by the theme, *Ongoing Challenges, Creative Solutions*, this conference will feature our colleagues' creative approaches to meeting new and ongoing challenges in technical services. In addition to these presentations, in-person attendees will have the opportunity to connect with each other during the reception at White Hall State Historic Site, located just north of Richmond, KY, and the evening dinner at Stratton Café on Eastern Kentucky University's campus. We hope you will be inspired by this year's presentations and that you will enjoy spending time with your fellow technical services colleagues!



Laura Edwards
Vice-Chair/Chair Elect, OVGTSL 2023
Associate Director of Discovery and Metadata, Eastern Kentucky University

Keynote Speakers

Crystal Rae Coel



Crystal Rae Coel, Esq. M.A. is the Assistant Dean for Student Affairs and Diversity for the Louis D. Brandeis School of Law at the University of Louisville. Dean Coel has over 30 years of administrative and teaching experience in higher education. Recently, she received the University of Louisville Student Champion Award for outstanding service to students and she won the Kentucky Communication Professional of the Year Award for 2022. Dean Coel joined Brandeis in May 2020 after 25 years at Murray State University, where she held a variety of leadership positions. She was the Director of a multiple 1st-place national award-winning Speech and Debate Union. Also, she served 13 years as the first African American Head of a 1200-member Residential College: Elizabeth College. Beyond her extensive career in higher education, Dean Coel is a freelance corporate consultant and a licensed Pennsylvania attorney. She has been a Kentucky representative for the American Bar Association's Mediation Committee and a member of Phi Alpha Delta Law Fraternity. She is also a member of Pi Kappa Delta Honorary Speech and Debate Fraternity, Phi Kappa Phi National Honor Society, and other Greek and philanthropic organizations. She is on the national board for the National Association for Law Student Affairs Professionals and serves as the Director of Communications for the American Association of Blacks in Higher Education. She has authored and co-authored several books and articles focused on communication skills, workplace bullying and first amendment rights.

AJ Boston



Arthur "AJ" Boston (he/him) is an associate professor and scholarly communication librarian at Murray State University where he manages the institutional repository and coordinates the Office of Research and Creative Activity. Boston has served as a Library Publishing Coalition Fellow (2019-21) and SPARC COAPI Steering Committee Member (2021-2023). Currently, Boston serves as an advisory board member for the Irish Open Access Publishers Group.

Selected works include <u>Read & Let Read</u>, <u>PiePlate</u>, and <u>Kanye West Explains Scholarly Communication</u>. ORCID: <u>0000-0001-8590-4663</u> Twitter: <u>@aj_boston</u>

2023 Scholarship Recipients

Kelly Burns, University of Kentucky

David Fiora. Indiana University

Angela Ren, University of Kentucky

Diversity Recipients

Albert Lin, Worcester Polytechnic Institute - Gordon Library

Angela Martinez, University of California, Los Angeles

2022-2023 OVGTSL Officers

Chair: Amy Bailey, Indiana University, Bloomington

Vice Chair/Chair Elect: Laura Edwards, Eastern Kentucky University

Secretary: n/a

Treasurer: Brittany Davis, Eastern Kentucky University

Archivist: Kathryn Lybarger, University of Kentucky

Webmaster: Derek Zoladz, Ohio Public Library Information Network

2023-2024 OVGTSL Officers

Chair: Laura Edwards, Eastern Kentucky University

Vice Chair/Chair Elect: Morris Levy, OCLC

Secretary: TBD **Treasurer:** TBD

Archivist: Kathryn Lybarger, University of Kentucky

Webmaster: Derek Zoladz, Ohio Public Library Information Network

Future OVGTSL Conference Locations

2024: Embassy Suites by Hilton, Dublin, OH

2025: somewhere in Indiana2026: somewhere in Kentucky

Anyone in Kentucky who is interested in self-nomination for the 2025 secretary and 2026 Vice-Chair/Conference Host can contact Laura

Edwards at laura.edwards@eku.edu

Concurrent Sessions for Presentations in Libraries 128, 204D, and 108 Rooms Thursday, May 18

10:30-11:20

Concurrent Sessions 1

Libraries **Bridging Collection Development and Cataloging**

128 Beth Morgan, Centre College Crystal Ellis, Centre College

> Crystal Ellis, Assistant Director of Library Services and Head of User and Access Services, and Beth Morgan, Cataloging Librarian, will discuss the importance of cross-departmental collaboration and communication to the success and efficiency of their acquisitions, cataloging, and collections maintenance workflows. Crystal and Beth will share and explain workflows they have developed that streamline their from-ordered-to-shelf processes and keep all affiliated staff aware of issues or idiosyncrasies in the areas of ordering, cataloging, and weeding; provide an overview of the micro training they implemented to bring non-cataloging staff up to speed on understanding and interpreting bibliographic data as presented in the acquisitions module of the OCLC Worldshare Management Services ILS; and discuss the importance of ongoing communication between the two to ensure maximum accuracy of the ordering and cataloging of print materials in their collection. This session will be particularly useful to librarians at small colleges with small tech services and acquisitions departments, or anyone looking to bridge workflows across departments.

Libraries 204D

From What If? To That Was EZ! Leveraging "auth eq" in EZproxy to take SAML Authentication to Scale Ilonda Burdette, Kentucky Virtual Library Enid Wohlstein, Kentucky Virtual Library

What if a every student in a statewide, multi-type consortium could log into consortium databases with their school-issued Google or Microsoft email address? Except the 600,000 student email accounts are administered by 171 different districts, and you're a staff of two, and you're self-hosted, and you don't know your SP from your IDP?

Join the Kentucky Virtual Library as we explain how we went from What if? To That Was EZ! With the help of a patient school district IT team, Ezproxy support docs, and the generous assistance of Ezproxy listserv colleagues from Boston to Australia. We'll focus on nuts-and-bolts implementation steps and provide extensive documentation, including model login page html and JS to seamlessly direct users to the right authentication server, for those who want to try this at home!

Libraries Living Separate Lives: How to Nurture a Work-Life Balance 108

Amanda Bullington, University of South Carolina Law Library

Librarians faced many challenges during the COVID-19 pandemic. Many of us quite literally brought our work home with us as we learned to interact with our colleagues virtually and adapted to performing our job duties from home. During this time, I was handed an additional personal challenge. I was diagnosed with a chronic health condition requiring multiple surgeries. I was now not only struggling to work from home as a cataloger but struggling to work from home as a cataloger while managing my daily pain. As someone who does not enjoy working from home, this seemed like an impossible challenge. The boundaries between work and home began to blur. I learned to utilize different methods to cope with my overwhelming feelings and separate my personal life from my work life, including mindfulness, bullet journaling, and a healthy dose of self-compassion. Drawing on literature from the psychology and library science fields, I will define "work-life balance" and outline strategies to promote it. This presentation will help library workers of all types realize the importance of keeping a work-life balance.

11:30-12:20

Concurrent Sessions 2

Libraries

Collection Management for Beginners: What I Did Not Learn in Library School

128

Melissa Brooks, University of Southern Mississippi

It's true that library school provides a valuable foundation to prepare one for work experience; however, certain lessons can only be learned on the job - often at the most inopportune moments. This presentation will explore collection management lessons learned - at rapid speed - following the retirement of the Collection Management Librarian after 35 years at the University of Southern Mississippi. Topics covered include negotiating licensing agreements, working with procurement and legal, managing budgets and identifying budget savings, and working with university departments, library liaisons, and vendors to get the job done.

Libraries 204D

Generalities to Specialties! Improving Access and Discoverability of Local Collections in Bibliographic Records

Cindy Cline, University of Kentucky

This presentation will describe how adding demographic terms (386 fields), local notes, expanded subject headings, genre terms (655 fields) and modified call numbers can improve access to local collections. Examples provided from recently processed collections at UK Libraries Special Collections and Research Center.

Libraries

Even Flow: Using Microsoft Flows to streamline library acquisitions work

108 Carissa Thatcher, University of Cincinnati

Have you seen the Power Automate icon in Microsoft 365 and wondered what that does? Or maybe you've heard about this thing called Flow but not sure what the big deal is? Would you like to up your acquisitions game, but not sure where to start? We'll kick off this session with Microsoft Power Automate and Flow basics such as naming conventions, expressions and variables. Then move on to the fun stuff, demonstrating how you can streamline your acquisitions processes through Microsoft Power Automate by harnessing the power of automating emails, populating SharePoint spreadsheets from a form, and how to set up a Flow approval process that will save you valuable time.

Learning outcome:

- Attendees will acquire a basic understanding of Microsoft Power Automate and Flow and in what way this tool can be used in the library setting.
- Attendees will learn how to set up a Flow.

2:15-3:05 Concurrent Sessions 3: Lightning Rounds

Libraries From 1300 to 300: Leveraging expertise to update a fund structure

204D Cara Calabrese, Miami University Elissa Martin, Miami University

In FY18 the library had reworked the fund structure in our ILS Sierra and in 2019 a new Acquisitions Librarian and Budget Specialist were hired. Once on board the Budget Specialist and Librarian started noticing discrepancies with fund codes and university account lines. At first we thought we were just speaking different languages since one of us had been brought up in libraries, while the other had an accounting background. It wasn't just our words that were mixing us up. When the fund structure in the ILS was redone the underlying university lines were not properly assigned. The university lines themselves were a bit outdated and inflexible, aligned to Books, Video, Subscriptions & Periodicals, Database fees. But all the heavily used funds in Sierra were being coded as books, even the electronic subscriptions! Our Lightning talk will cover how we tried to work within the limitations on the university funds lines to overhaul our fund codes. We will share how an unexpected collaboration between the library and University Accounting ultimately yielded a more flexible system. We will compare the old and new fund structures to highlight how we satisfied both Collection Development, Acquisitions, and University Accounting's needs. We implemented this new structure beginning in FY22 and completed the bulk of our cleanup by the end of that fiscal year. Bringing us down from over 1,300 funds to nearly 300 in a sustainable way.

An Odyssey: Merging Two Interlibrary Loan Departments into One

Courtney Taulbee, University of Kentucky Amanda Williams, University of Kentucky

During the 2021/2022 fiscal year, the University of Kentucky Libraries decided to take the opportunity to make service updates while workflow was altered or restricted by the pandemic. The Main Campus and Medical Center Interlibrary Loan/Document Delivery services at the University of Kentucky Libraries merged in order to streamline services and resources for both our patrons and staff. Having assessed this idea in the past, it was determined that this would be a suitable time to implement this change. Some of the highlights include merging OCLC symbols, reorganizing staff responsibilities and workflow, centralizing the patron interface, and reassessing policies. This effort required collaboration with library employees across different departments as well as with vendor support professionals. We will share the experience of planning and implementing this change and what we have learned along the way.

2:15-3:05

Concurrent Sessions 3

Libraries 128 Patron Driven DEI Acquisitions: Using Education Students and the Diverse Book Finder to Diversify a Children's Picture Book Collection

Mitchell Scott, Indiana University Southwest

In Fall 2022, the IU Southeast Library won an institutional Diversity, Equity, and Inclusion grant to conduct research on a patron driven acquisitions project carried out in a 300-level education course for preservice learning teachers. Leveraging the grant funds and the objectives of the 300-level course, we embedded an acquisition project into the course that used the Diverse Book Finder (DBF) as a teaching and selection tool. 29 students enrolled in the course were tasked with using the Diverse Book Finder to select 5 picture books that would be purchased and added to the library collection. This session will cover the Diverse Book Finder as an assessment and acquisition tool, how the IU Southeast Library worked with faculty to embed this project into their curriculum, and the details and results of this project, including what students' responses to the pretest and posttest survey reveal. Finally, we will also address the potential this project has uncovered for potential embedding more patron driven acquisitions projects into the IU Southeast curriculum.

Libraries 128 Print Government Documents: Working Together to Eliminate Your Print Documents (with Empathy)

Claudene Sproles, University of Louisville

Tyler Goldberg, University of Louisville

This presentation will describe how adding demographic terms (386 fields), local notes, expanded subject headings, genre terms (655 fields) and modified call numbers can improve access to local collections. Examples provided from recently processed collections at UK Libraries Special Collections and Research Center.

3:15-4:05

Concurrent Sessions 4

Libraries

Forgoing the "Rule of Five": Fair Use Analysis in Interlibrary Loan and Collection Development

128 Linda Sizemore, Eastern Kentucky University

Ashley Cole, Eastern Kentucky University

Are you being bogged down by copyright? Are you getting all the access you deserve? Eastern Kentucky University Libraries recently developed and implemented a new copyright policy for interlibrary loan that forgoes the outdated CONTU Guidelines or "Rule of Five" to more closely comply with Copyright Law and leverage Fair Use.

In this session, the presenters will discuss the inspiration behind abandoning CONTU, the process for obtaining approval from library and university stakeholders, and the impact of a new copyright policy on interlibrary loan workflows and collection development decisions. Participants will also engage in a discussion of the opportunities and obstacles regarding their own use of, or departure from, CONTU Guidelines.

Libraries 204D

Authority Control: it's not just for Catalogers

Carl Horne, Indiana University - Bloomington

This presentation will discuss the importance of authority control of access points in the library's online catalog. Authority control, by means of a file of authority records, is the linchpin of a well-ordered catalog - it is the means of creating and maintaining standardized access points throughout the file of bibliographic records. It is this good order that makes searching in the catalog efficient. The importance of authority control is a matter that Technical Services, and especially catalogers, need to impress on public services and other librarians across the organization, because non-catalogers sometimes view authority work as a luxury, or even as a waste of catalogers' time. The presentation will also cover certain elements in authority records, especially with some recent changes, that provide more useful/clearer information to catalogers and can be brought to the attention of non-TS librarians.

Libraries

Common goals yield positive connections: Improving workflows and project's success with collaboration

108 Cara Calbrese, Miami University

Elissa Martin, Miami University

Katie Gibson, Miami University

Collaborations with other departments have become invaluable to Acquisitions work at our library. Acquisitions has worked with Subject Librarians and the Budget Specialist on several projects all of which would have been dead in the water or taken significantly longer without collaborative support. In this presentation we will highlight several projects in which partnering was central to accomplishing the project's goals. These include reviewing and updating database descriptions in the Databases A-Z list, updating the weeding procedure in the wake of a branch library closure, creating streaming video workflows from scratch and modifying them as needed, moving licenses from paper to electronic storage, and an overhaul of our entire fund structure. The Acquisitions Librarian from Technical Services, the Budget Specialist from Administration, and a Humanities Librarian from Advise and Instruct will share notes and tips from these collaborations and how working together benefitted communication lines along with the projects.

Come learn about our cross departmental collaborations and see which might be worth pursuing in your own libraries!

Friday, May 19

10:15-11:05

Concurrent Sessions 5

Libraries Training Buffet: Self-service acquisitions training for librarians and staff

128 Cara Calabrese, Miami University Ginny Boehme, Miami University

> While acquisitions workflows and tools have updated over the years, our training methods have seemingly not evolved with the same speed. At ALA Annual there were a few conversations about teaching and training new acquisitions staff. Many emphasized that learning on the job was one of the best tools, and many of our colleagues have had success with implementing asynchronous instructional materials. For example, after a colleague was able to develop a copyright course, she was then able to turn her attention to other pressing tasks. Why can't we do the same for acquisitions?

> In 2022, Acquisitions partnered with Instruction to design online training that could serve as an orientation to how acquisitions works for new staff and librarians, or be used in bite-sized chunks as a refresher course for others. The partnership has been fruitful thus far. We are incorporating not only written information, but videos, other media, games, and activities to reinforce content along with assessments and quizzes to test mastery of the material and to assess our course. We will discuss how we decided on what topics to start with, share our development, first uses, and assessment of our work. We will also share how we evaluated potential platforms and what topics we hope to branch into next!

Libraries Time to Get Technical about Technical Services: Reorganizing Technical Services at Bowling Green State 108 University

Patricia Falk, Bowling Green State University

Technical Services in libraries has been undergoing changes in the past ten years and Bowling Green State University (BGSU) is no exception. Changes in technology, processes, and attrition in staffing have been just a few of the reasons for this significant change. University Libraries (UL) at BGSU has recently made a change in its organizational structure that has been affected by some of these factors. Previously, our Technical Services area included numerous classified staff catalogers, a head of cataloging, head of serials, head of acquisitions, an e-resources librarian, and several other support staff members to assist with processing and cataloging of our main stacks collection and Special Collections (SC) materials. As of 2023, UL will have one faculty catalog librarian and one classified staff cataloger for the main stacks and to assist with Special Collections cataloging. Other technical services duties (acquisitions, serials, etc.) have been transferred to other staff and there will no longer be a Technical Services Department. While there are other professional faculty catalogers in the SC, none of them can take on additional main stacks' duties on a permanent basis. This change has affected all UL departments and will have a significant impact on our upcoming transition to a new ILS system. I plan to provide the steps made in the reorganization process, the challenges and opportunities, and our hopes for the future of Technical Services duties in the UL.

Friday, May 19

11:15-12:05

Concurrent Sessions 6

Libraries Copy Cataloging and Rare Books

128 Cindy Cline, University of Kentucky

Presentation will mention the new standard for rare books cataloging that aligns with RDA, DCRM-RDA, discuss what is a rare book, how to identify records for rare books, describe fields specific to rare books, provide examples and resources for cataloging rare books.

Libraries Cataloging and InterLibrary Loan: Cross Sections in Service

204D Presley Dyer, Tennessee State University

Cataloging and Interlibrary Loan? Together? That's an interesting combo. After undergoing departmental reconstruction, Tennessee State University Library did exactly that. By combining two services that were often not housed together, new findings and issues emerged, allowing Cataloging to use unfilled ILL requests as a foundation for cleaning up the catalog and verifying its WorldCat holdings. Such findings have also ensured better ILL fill-rate accuracy and discovery. Most importantly, this presentation showcases how both services check and balance each other with outcomes worth paying attention to and solving together in a new workflow.

Libraries Looking through the Prism: changing from collection development to collection strategy

108 Catherine Seago, University of Kentucky

The University of Kentucky has long seen itself as the flagship University of the state and its Libraries have a collection development policy geared toward just in case collections and trying to be comprehensive in a world deluged with information and data. With all the changes in terms of moving instruction more online, budget challenges, and collecting more perspectives and viewpoints (DEI), the University of Kentucky is shifting towards a model of collection strategy based on core values and the mission of the Libraries and Institution. This shift affects how Acquisitions manages the budget and handles requests from users and librarians. This presentation will discuss the theory and what changes Acquisitions is making to deal with this new perspective.

OVGTSL 2023 Business Meeting Agenda

- 1. Call to Order
- 2. Approve the OVGTSL 2022 Business Meeting Minutes
 - a. The OVGTSL 2022 Business Meeting Minutes are available on the OVGTSL 2023 conference website:

https://encompass.eku.edu/ovgtsl2023/schedule/1/28/

- 3. Introduce the Executive Committee
- 4. Acknowledge the Conference Sponsors
- 5. Announce the Scholarship Award Winners
- 6. Share the Treasurer's Report
- 7. Conclude the Meeting

OVGTSL 2023 Conference Planning Committee Members

Programming Committee

Chair: Jill Sherman
Debbra Tate
B. Joyce Graves

Registration Committee

Chair: Brittany Davis Laura Edwards

Scholarships Committee

Chair: Jennifer Montavon-Green
Jennifer Jeffers
Megan Stewart

Fundraising Committee

Chair: Sandy Baird Laura Edwards

Local Planning Committee

Chair: Laura Edwards
Brittany Davis
Bailey Lake
Ashley Williams
Kenndra Martin
Cristina Tofan
Todd King



Free Time

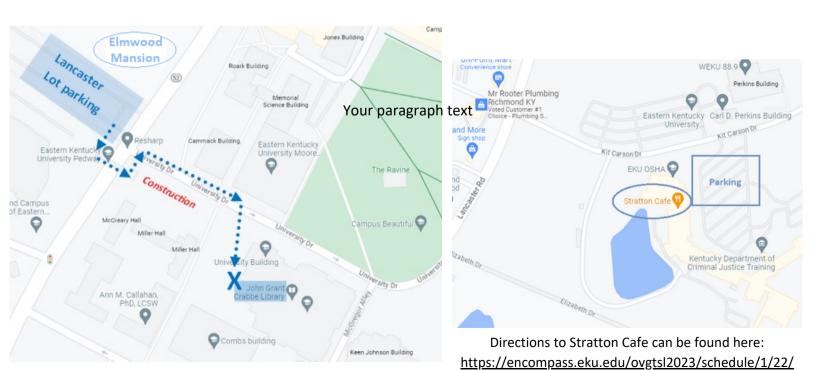
On Campus and Around Town

- Sign up for a tour of the Elmwood Mansion, Thursday, May 18: 4:30-5:30
 - Sign-up sheets will be at the registration table up to 2 groups of 15 participants can sign up
 - Tour will begin at the Elmwood Mansion.
 - Elmwood Mansion is located in the large green lot next to Lancaster Lot parking lot, the recommended lot for conference parking. There is a walking path from the parking lot to the mansion.
- Rub the toe of the Daniel Boone statue for good luck
 - The statue is located in front of the Keen Johnson building, right next to EKU Libraries. You can't miss it!
- Take walk to the Ravine directly across from EKU Libraries
 - Designed by the Olmstead Brothers
- Visit Madison County Public Library: https://madisonlibrary.org
 - o 507 W. Main Street, Richmond, KY
 - Hours:
 - Monday-Thursday: 9am-8pm
 - Friday & Saturday: 9am-6pm
- Missed the reception at White Hall State Historic Site?
 - Tours are offered: Wednesday-Saturday 11am, 12:30pm, 2pm, & 3:30pm
- Visit Battle of Richmond Visitors Center and Battlefield Park
 - 101 Battlefield Memorial Hwy, Richmond, KY 40475
 - Hours: 8am-4:30pm
- See Visit Richmond KY's website for more options: https://visitrichmondky.com/

Further Afield

- Check out the arts and crafts districts of Berea, KY:
 - Artisan Village: https://visitberea.com/shopping/artisan-village/
 - o College Square: https://visitberea.com/shopping/college-square/
 - Chestnut Street: https://visitberea.com/shopping/chestnut-street/
- See Visit Berea's website for all the options: https://visitberea.com/





OVGTSL 2023 Conference Schedule at a Glance

Wednesday, May 17

Thursday, May 18

6:00-8:00 Reception at White Hall State Historic Site

8:00-9:00	Check In and Breakfast	First Floor Study Area
9:00-10:15	Opening Keynote by Dr. Crystal Rae Coel	Libraries 108
10:30-11:20	Concurrent Sessions 1 Bridging Collection Development and Cataloging	Libraries 128
	From What if? to That Was EZ! Leveraging "auth eq" in EZproxy to Take SAML Authentication to Scale	Libraries 204D
	Living Separate Lives: How to Nurture a Work-Life Balance	Libraries 108
11:30-12:20	Concurrent Sessions 2	
	Collection Management for Beginners: What I did not Learn in Library School	Libraries 128
	Generalities to Specialties! Improving Access and Discoverability of Local Collections in Bibliographic Records	Libraries 204D
	Even Flow: Using Microsoft Flows to Streamline Library Acquisitions Work	Libraries 108
12:30-1:30	Lunch	First Floor Study Area
1:30-2:00	Business Meeting	Libraries 108
2:15-3:05	Concurrent Sessions 3	
	Patron Driven DEI Acquisitions: Using Education Students and the Diverse Book Finder to Diversify a Children's Picture Book Collection	Libraries 128
	Lighting Talks	Libraries 204D
	Print Government Documents: Working Together to Eliminate Your Print Documents (with Empathy)	Libraries 108
3:15-4:05	Concurrent Sessions 4	
	Forgoing the "Rule of Five" : Fair Use Analysis in Interlibrary Loan and Collection Development	Libraries 128
	Authority Control: It's Not Just for Catalogers	Libraries 204D
	Common Goals Yield Positive Connections: Improving Workflows and Project's Success with Collaboration	Libraries 108
4:30-5:30	Optional Tours of Elmwood Mansion	
6:00-8:00	Dinner at Stratton Cafe	
Friday, May	<i>y</i> 19	
8:00-9:00	Check In and Breakfast	First Floor Study Area
9:00-10:00	Closing Keynote by AJ Boston	Libraries 108
10:15-11:05	Concurrent Sessions 5	
	Training Buffet: Self-service Acquisitions Training for Librarians and Staff	Libraries 128
	Time to Get Technical about Technical Services: Reorganizing Technical Services at Bowling Green State University	Libraries 108
11:15-12:05	Concurrent Sessions 6	
	Copy Cataloging and Rare Books	Libraries 128
	Cataloging and InterLibrary Loan: Cross Sections in Service	Libraries 204D
	Looking Through the Prism: Changing from Collection Development to Collection Strategy	Libraries 108