

**"Advocacy in Acquisitions: Defining Value, Expanding Roles, and Staffing Intentionally", 2019 ALA Annual Conference, Washington, D.C.**

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**Laura Sill's notes for her portion of a co-presented program panel titled "Advocacy in Acquisitions: Defining Value, Expanding Roles, and Staffing Intentionally", delivered at the 2019 American Library Association (ALA) Annual Conference in Washington, D.C., Sunday, June 23rd at 9:00 a.m. at the Washington Convention Center (143B) at the invitation of the ALA Association for Library Collections & Technical Services (ALCTS) division, Acquisitions Section (AS), Organization & Management Committee. Co-panelists were: Debbie Falvey, Collections Procurement Librarian, Yale University and L. Angie Ohler, Director of Collection Services, University of Maryland.**

Slide 1 - Title Slide - 30 sec.

Good morning. Thank you, Paul and ALCTS for the invitation to be part of this panel this morning. I am honored to be here.

Slide 2 - 2:16 min. -- SLIDE - Problem Statement

When Paul called me to invite me to participate here today and shared the presentation topic, I remember thinking, yes, this is what I'm dealing with everyday! I imagine this morning, I have an entire room of people who understand the situation.

So much of what we as technical services administrators are focused on today relates to change management, as we have heard already from Angie and Deb. Change has always been part of acquisitions management, but as the problem statement in this slide attests, it feels like the number of large scale changes are increasing in volume and the need to adapt quickly is required to keep pace with community needs.

If you attended Friday's pre conference on change management, the keynote speaker, Janetta Waterhouse, shared the idea of order of change. First order of change involves slow, incremental change, while second order of change results in a radical change that permanently alters the nature of the organization.

I want to share our attempts at Notre Dame to introduce 2nd level order of change and to do so, I'm going to share three ideas for your consideration pertaining to advocacy for acquisitions staffing and then expand on each:

- Number 1. Be able to explain why your acquisitions operation exists.
  - In other words, what is the value add, the "why" for the operation?
  - And, while Angie and Deb both mentioned providing that broader context to staff and librarians in acquisitions, I'm focused here on selling acquisitions to your administration. To your University Librarian or to your Provost, for example.
  - With so many vying for resources within the library and across campus, it is critical that you really think about your value add to the community at large and be able to pitch it at a high level, followed by backing it up with specific strategies and position needs you require.
- Number 2. Keep an open mind when thinking about where to draw expertise for your acquisitions operation.
  - I will share the backstory for two positions that infused much needed expertise into our acquisitions operation, but where recruitment for this expertise targeted disciplines or

professions other than library science and which could have been posted by a wide range of service industries.

- I arrived at this strategy by thinking that surely libraries are not the only environment dealing with these issues. If so, then who else is facing the same set of problems and how do they address them?
  - My goal with this strategy was to support librarians with formal training and staff with significant on-the-job library experience in acquisitions, allowing their functional expertise to shine through more effectively, especially in the areas of decision-making and service development.
- Number 3. Be prepared to think about staffing and hiring on a daily basis.
    - While thinking about the evolution of acquisitions in our libraries, we may see slow movement or quick development. Because change is sometimes unpredictable in its pace, advocates for acquisitions need to be both patient and diligent, always ready to provide a consistent message about staff development in acquisitions.
    - And, staffing is so important to our success! Human beings are able to think critically and make good decisions based on a variety of factors and as such, our staff are our most precious resource... more important than our systems or the deals we cut.
    - Managing our staff talent requires ongoing strategic and iterative thinking, action and commitment.
    - In other words, staffing and hiring becomes intentional.

Slide 3 -2:44 min.

So let's look more at Suggestion #1: Be able to explain why acquisitions exists.

-- SLIDE - ILLAS CONCEPTUAL --

This slide illustrates a conceptual model of our Interlibrary Loan and Acquisitions unit, called ILLAS as it exists organizationally, today. It highlights the interrelated nature of three main functional areas, as well as provides some insights into the cadence of work. I always include a picture of the unit when talking about staffing along with sharing our 'why', as a means to reiterate the complexities of our work. We are not "just ordering books" or "filling ILL requests" -- which in and of themselves are complex services, with high expectations for solid decision-making.

Our work is sometimes poorly understood by our peers, and so when I advocate for staffing in my acquisitions operation, I emphasize our partnership with others in scholarship, our ability to maximize the use of technology to acquire resources for researchers, faculty and students, and our dedication to provide user-oriented discovery experiences. I convey through stories about our business and service transactions, our understanding of how scholarship and teaching depend on knowledge of and access to information resources, and how we value innovation and efficient solutions for resource acquisitions and discovery.

Deb and Angie mentioned the "Core Competencies for Acquisitions Professionals" completed in 2018. This best practices document outlines a dizzying array of expectations for Knowledge, Skill, Ability and Behavioral Competencies.

Our functional experts cannot do it all! Somewhere within the operation deep analysis and careful project planning also need to exist. The expectations and roles in acquisitions need to expand to meet the needs of our community.

I have found that typically acquisitions positions included expectations for tackling the big planning questions and doing the complex analysis and project work. But functional experts are often also responsible for -- functional expertise, (of course!), but also personnel management, staff training, building partnerships with stakeholders including content strategists and other collection development librarians, administrators, fiscal and legal entities on campus, systems and materials vendors, and being aware of key publishing and industry standards and trends.

Slide 4 - 1:12 min.

---CONTINUUM SLIDE ----

Another possible context is the continuum from collection assessment to acquisitions as presented here by Johnson in 2016 in the article "Moving from Analysis to Assessment: Strategic Assessment of Library Collections".

Pause for a minute and think about making a change in practice along any point of this continuum. Likely there will be a ripple effect in either direction in terms of services, stakeholders, systems, policies and procedures. You know that collections and acquisitions work involve a tremendous degree of service, technical and data integration. I would also venture to guess you have experienced, as I have, the problems created, and resources and time wasted, when the full impact of what may seem like a simple change indeed impacts the whole. Insuring a cohesive and healthy collections and acquisitions service ecosystem takes having the right staff in the right places.

So, however you need to do it, be able to articulate your purpose and share in whatever way will get the message out. You cannot take for granted that everyone understands the complexities or the impact of the work carried out by our acquisitions operations.

Slide 5 - 4:12 min.

-----RAD ANALYST SLIDE----

So, this leads me to suggestion #2: Keep an open mind when thinking about where to draw expertise for your acquisitions operation.

I present you with this very wordy slide, which admittedly is intended to help you more after this presentation than during it. It outlines the main responsibilities of our new position at Notre Dame called RAD Services Analyst.

My intent advocating and hiring for this position was to concentrate on systems thinking and exploring how to unify, integrate and streamline our work.

I thought, if someone with the right skills, mindset and inclination towards conducting research and forecasting direction were part of our team, our acquisitions leadership could get some relief from the pressure to do it all. Acquisitions librarians and staff would have better information from which to make

decisions around projects and maintenance of business work as well with the various functional and service areas of acquisitions.

Free from the management and operational responsibilities, the Services Analyst focuses on service optimization, scalable solutions, data driven measures, business case development and knowledge management.

I arrived at these areas of focus by reading and thinking about job descriptions from a number of professions, including business, engineering, information technologies, supply chain management and even construction. While the Notre Dame position description includes the option to highlight a candidate's library technical services skills, the position does not require training in library science. It calls for a bachelor's degree in business or information technologies or related fields (of which library science could also fit).

Now, for the sake of transparency, we hired an internal candidate who has a library degree.

Because it is the first of its kind in our library, It has taken some time to show how the skill set contributes to the success of acquisitions and general technical services. Today, I am pleased to see acquisitions team members request that the Services Analyst attend meetings related to adding new services, vendor visits, and cross-unit service discussions.

The neutral voice and deep thinking skills of the individual in this position has provided us room to explore integration of workflow between units, dive into our largest and most complex vendor services accounts, and review acquisitions and outsourcing vendor services to maximize what we do to meet expectations in the wake of losing a larger % of our acquisition staff on July 1 to a university-wide Retirement Incentive Program (yes, and I do mean in just a few days).

The ultimate success of this position lies in its integration with program sprint planning. Organizationally, we have a project management culture, used in institutional strategic planning down into our program planning. Our ultimate goal is to queue the research questions for business case development by the Services Analyst from our sprint backlog. These business cases will then drive our project scoping, prioritization and execution. Additionally, ILLAS leadership can be more strategic about projects and balancing them with transactional maintenance of business work which still consumes a large portion of our acquisitions activity.

With this position, the acquisitions librarian and staff retain their ability to make operational decisions and have functional ownership of acquisitions services.

Slide 6 - 2:55 min.

-----COLLECTION DATA ANALYST---

In the same vein, our second new position for Notre Dame is our Collection Data Analyst. This position supports ILLAS and a larger 2015 mandate assigned to the unit by our AUL to build out a program of collection assessment.

Position development for the Collection Data Analyst started by understanding the state of collection assessment in our library and the profession. We explored best practices, possible program scope,

budgetary, tools and staffing needs. From this review we learned we had some fundamental challenges - mainly that our systems are very disparate and that our data is very dirty. Without real technical muscle and the ability to get to the data, we did not have the ability within acquisitions to access, collect or analyse our existing data in a holistic way. These foundational problems could not be fixed overnight, and yet, we also knew collection strategy and administrative decision making depended on proposing ideas with data, right now, today.

Due to the technical training we anticipated we needed, in developing the case for this position, I looked to computer science, data science, business and information systems to help understand how our needs might be filled. The position description needed to make sense to those from the domains just mentioned and minimize the use of library jargon. In the end, our posting required a bachelor's degree or an associate's degree with experience in one of these disciplines.

The description focused on data collection, building a solid data store, addressing data integrity, and providing data analysis and visualization.

The search committee for this position included a presentation to a small group, as if to a University Committee on Libraries, an Advisory Council, to give us insights into how the incumbent would take their sophisticated technical skills and understanding of data and communicate this information in a digestible way for the sake of organizational decision-making.

Our incumbent has a bachelor's degree in mathematics with a focus on statistics, and minors in computer science and music. He has moved us forward quickly in our work, and we are learning so much from him about our institutional data.

Our challenges have been few, but one small point during acclimation was working with our IT staff to develop shared comfort with someone from acquisitions asking questions about database structure, access to data and requesting space for storing harvested data... and doing so with a high level of sophistication.

Our Head of Acquisitions along with our program director for IT have worked well together to find ways to mentor and build partnerships between ILLAS and IT to support the Collection Data Analysts work. At this point in our evolution, this position has bridged gaps and provided data-driven insights into our acquisitions work, helping us to make smarter proposals and be better stewards of our University's resources.

Slide 7 - 2:45 min

-----GOLDEN DOME SLIDE -----

Before I close, I share with you this photo that I took this past spring on my daily walk across our beautiful campus. I am in the habit of walking as many work days over lunch as I can...all year round. These walks are one of many places throughout my day where I can quietly think.

So, with this beautiful view of the Golden Dome, I remind you of suggestion #3: Be prepared to think about staffing and hiring on a daily basis.

Integrate your hiring plan, and your vision, into your thinking and into conversations you have about acquisitions work with your boss, your peers, and your administration, ...really, anyone who can help you advance your goals for the function and its services. One ally in my experience has been our Director of Finance, who manages the overall salaries budget and is a key participant in all executive administrative discussions regarding positions.

Because I am often recasting positions as they become vacant and using salary dollars in new ways, meeting quarterly with Finance provides me the opportunity to recap my vision, give the heads up on vacancies, and to share position proposals.

Talk about staffing wherever possible; make known your intentions for future positions and explain your strategy and purpose for needing the position. You might be surprised where you will get ideas and support for your ongoing efforts to improve acquisitions.

So, I close by recapping my three suggestions:

1. Be able to explain why acquisitions exists.
2. Keep an open mind when thinking about where to draw expertise for your acquisitions operation.
3. Be prepared to think about staffing and hiring on a daily basis.

And, I thank you once again for this opportunity to share our experiences this morning.