

# Recommendations for Small Shops

## Managing Collection Services in Small Libraries

*Kaci Resau and Elizabeth Anne Teaff*

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### Introduction

Managing collection services in small libraries presents unique challenges and opportunities. This Communications on Practice piece combines insights from two authors with extensive experience in various library environments with limited staff, including small academic institutions and specialized libraries. The goal of this piece is to provide practical recommendations for effective collection services in small libraries, focused on day-to-day operations, project management, emerging technologies, training, and communication. By harnessing these strategies, department managers and technically focused library staff can create responsive, efficient, and practical collection service practices, particularly in resource-constrained environments.

### Background

Elizabeth Anne Teaff works in a small academic library at a rural private liberal arts university with an undergraduate population of approximately 1,800. They have led the collections services team for three years, in addition to supporting access services, including circulation, interlibrary loan, stack maintenance, and building and event logistics. Over the past twenty years, the size of their library's technical services unit has diminished, evolving into the current Collection Services team of three staff members who handle acquisitions, cataloging, database management, and the library's discovery layer. The team manages a print collection of approximately 650,000 volumes, millions of ebooks, various databases, streaming video, and other media. The library uses Alma for resource management, Primo VE for its discovery service, and OpenAthens for authentication management. Kaci Resau, DPA, has worked in a range of library environments, including small academic liberal arts institutions, libraries serving large user populations with limited staff, a for-profit online institution, a medical school library, and a corporate information center. Staffing sizes in collection management roles across these institutions have ranged from one to four dedicated employees. In 2023, Resau completed a dissertation focused on succession and workforce planning in small to mid-sized academic libraries in the United States, highlighting the need for agile and flexible strategies when managing collections in small library teams.

### Training and Day-to-Day Operations

In both authors' experiences, collection management staff play a pivotal role in maintaining and enhancing access to library resources. Daily tasks include troubleshooting access issues, managing

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holdings and entitlements, updating link resolvers, reviewing usage statistics, and coordinating or interpreting licensing terms from vendors. Staff also handle acquisitions, monitor fund allocations, participate in weeding projects, and work across integrated library systems and discovery layers.

Since joining the collections services team, Teaff has secured funding for vendor-led training, which proved valuable when a new acquisitions staff member was hired. Staff also use self-created checklists, videos, and documentation for training. Additionally, the chat feature embedded in Alma allows personnel to engage ExLibris staff and address day-to-day issues. Because no current employees participated in the migration to Alma/Primo in late 2017, they depend on and enhance the documentation created by previous staff as well as vendor-supplied resources. Staff members also regularly take classes from organizations such as Library Juice Academy. This past fall, Teaff and the Cataloging and Metadata manager took classes in MarcEdit because the tool was new to them. Taking the course together allowed them to discover how the tool might best fit into their current workflows.

Across various institutions where they were employed, Resau has also coordinated vendor-supported training. Staff can benefit from training sessions that offer direct insight into platform functionality, administrative tools, and troubleshooting workflows. Attending and organizing these sessions helps ensure that staff remain current with vendor platforms. Resau has worked in institutions where these sessions are for staff only and at institutions where the vendor provides the training to the end-user population. Although both types of training can be beneficial, training specifically for the library staff allows employees to speak to the experts directly.

Another valuable approach to supporting staff training is to encourage employees at all levels to engage with professional standards and guidelines. One such document, [The Core Competencies for Cataloging and Metadata Professional Librarians](#), was developed in 2017 by the Association for Library Collections & Technical Services, now part of ALA Core.<sup>1</sup> This resource outlines essential knowledge and skills for metadata and cataloging professionals, and serves as a foundational guide for professional development. The competencies have since been revised; in a 2023 article, Evans et al. discuss the results of a survey they conducted to gather feedback on the competencies. They offer recommendations for revising and maintaining the document to ensure its continued relevance and effectiveness.<sup>2</sup> Additionally, the article emphasizes the importance of promoting competencies as a tool for ongoing professional growth and training within the field. Core competencies can also be found in the [NASIG documents](#). NASIG is an organization dedicated to the management of information, serials, and electronic resources, is an important tool for collection management leaders and staff. The core competencies provide an important framework around developing position descriptions, highlighting the skills needed to excel in the field, and how the competencies can be used to evaluate excellence in job performance.<sup>3</sup>

Creating effective onboarding and training materials is crucial in collection management units, particularly given the technical complexity and systems involved. When developing training plans for staff, it is essential to analyze roles and document processes and procedures.<sup>4</sup> It is also important to capture as much useful institutional knowledge as possible during this phase. Resau recommends

developing modular, role-based training tools that can be reused and easily updated over time. These materials can include annotated screenshots, video tutorials, flowcharts, and live training sessions. Tools such as OneNote, LibGuides, screen capture, or software like Snagit or Camtasia can be useful in building accessible and adaptable training materials. Resau has documented policies, procedures, and processes in digital courses, enabling staff and students to complete training asynchronously and review content as needed.

## Utilizing Technology

Although it is important to stay abreast of technological advancements, relying on established technology can also benefit small libraries. Emerging technologies, including artificial intelligence (AI) tools, have begun to influence collection management workflows and vendor products. AI can assist with title deduplication, license comparison, usage pattern analysis, and metadata generation for new acquisitions. In a recent study, Dobreski and Hastings performed tests to determine how effective ChatGPT, Gemini, and Copilot were in assigning Dewey Decimal Classification (DDC) and Library of Congress Subject Headings (LCSH). Their findings showed that AI may have potential for assigning LCSH, but it was unsuccessful with DDC. This study demonstrated that although AI may improve technical services in the future, there is still room for growth.<sup>5</sup> When using AI, it is also important to be cautious, ensuring data privacy, understanding algorithmic bias, considering the environmental cost of AI tools, and reviewing vendor license restrictions.

Resau has experience working with Scopus AI and Primo Research Assistant. They also have familiarity with platforms such as PatSnap, IEEE, and *The Wall Street Journal*, which include AI tools for end users. Libraries should monitor which resources utilize AI methods, the types of models used, the data on which the models are trained, how these services can benefit users, and what features can be excluded per the license. In some cases, it may be desirable to disable AI features to protect patron or institutional privacy. For both authors, AI has become an essential tool for addressing issues with Excel KBART files, standardizing files for usage statistics, helping with the XLOOKUP function, improving metadata and cataloging processes, and resolving challenges with analytics and data visualization tools. AI can also be helpful with building custom codes for products like LibGuides and discovery layers. AI can also craft vendor emails when asking complex questions about platform functionality. It can also be used to communicate with internal information technology (IT) departments, ensuring librarians speak the same language as their colleagues, easing friction, and improving communication.

Older tools such as MarcEdit are essential for batch-editing MARC records and preparing files for ingestion into discovery systems. MarcEdit is invaluable for performing global changes, correcting data inconsistencies, and converting between formats like MARCXML and MARC21. The tool is helpful for libraries with limited access to cataloging tools, offering an open-source, flexible system for editing records. Resau has used MarcEdit in lieu of other proprietary software to complete cataloging tasks such as record manipulation, batch processing records, creating regular expressions, and as a “Find and Replace” tool for updating fields in bulk.

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## Project Management

Both authors have experience managing complex projects, such as transitioning from EZProxy to OpenAthens. These projects require changes to systems and workflows, impact user behavior, and depend on coordination across multiple internal departments and external vendors. Early definition of project scope and stakeholder engagement is critical, as is careful assessment of staff capacity to determine whether internal teams can manage the workload or if external support is required. Teaff's library uses the Primo Customization Package for library-specific branding and to display floor locations for print materials. Working with this product requires knowledge of CSS, HTML, and JavaScript. JavaScript is a language with which no one on the current team is familiar. This presents a great opportunity to leverage tools like ChatGPT for code recommendations. The switch to NDE (Next Discovery Experiences) may mitigate some of this work, however, as there may be expanded configuration tools within Alma. They plan to contract ExLibris for their Premium Services to collaborate with their team of consultants and developers for more complex projects, such as building import profiles for external vendors. The decision to transition from EZproxy to OpenAthens for Teaff was made before their promotion to their current position and occurred within the first month of their new role. During the initial phase of the transition, EBSCO assisted with many of the vendor changes, and they continue to work closely with them for ongoing OpenAthens support. Because the library no longer has a dedicated systems librarian, the support from their IT department and vendors has become crucial, especially for integration with OKTA, a Single-Sign-On application that supports SAML for authentication and network access.

Resau comanaged multiple authentication transitions, including a year-long migration from EZproxy to OpenAthens, and a shorter-term shift from EZproxy to OKTA SSO in a subsequent role. The decision to transition from EZproxy to OpenAthens was driven by institutional security concerns, limited internal IT support for managing proxy servers, and a desire to improve the user experience. Early in the process, Resau engaged in preproject research,<sup>6</sup> including reviewing literature on similar migrations,<sup>7</sup> consulting with other librarians, and presenting those findings in a briefing document to leadership. This research also informed the institution's request for information, which included exploration of other vendors such as LibLynx.<sup>8</sup> OpenAthens was selected based on sustainability, cost, support, and success in similar environments. A cross-functional project team was then formed, which included staff from collection management, IT, library leadership, and vendor representatives. Weekly meetings with internal and external partners ensured ongoing progress and accountability.

Several key lessons emerged from these authentication transitions that can inform similar projects in collection management units. Project scope and stakeholder engagement are critical, particularly in identifying collaborators from the department, IT, the institution, and vendor support. Establishing a dedicated project team with clearly defined roles can also help provide accountability and make a pathway for consistent progress. A structured communication plan, both internal and patron facing, helps manage expectations and reduce confusion. It is important to leverage vendor expertise, and doing so can streamline implementation, particularly in technical areas like configuration. Throughout

the project, thorough documentation of processes, decisions, and contact points proved invaluable for knowledge transfer. Additionally, a well-developed migration communication plan, including ample testing and a sufficient timeline, minimized disruptions. Targeted training tailored to both staff and end users fostered a smooth transition and addressed many questions before the new authentication method went live. Finally, gathering feedback, tracking issues, and developing usage reporting plans were important areas to continuously improve. Gathering feedback also demonstrated the value of the new authentication method to stakeholders.

One final aspect of project management is highlighting the success of the project to the administration. Although this is often done at the end of the project, Robyn M. Gleasner emphasizes the importance of marking milestones and communicating the “small successes” of the project to both the team and the administration.<sup>9</sup> These incremental achievements not only help maintain momentum and motivation among staff but also keep stakeholders informed throughout the process. Regularly showcasing progress can build trust and provide opportunities for timely feedback or course correction.

## Communication Tools and Knowledge Transfer

Kristy White and John White note that “[c]hanges in the work of traditional technical services have underlined the need for a continuous reassessment of workflows...due to increased technological capabilities and...expectations from users.”<sup>10</sup> To that end, effective communication and documentation practices are essential for successful collection management. In the last ten years, numerous tools have emerged to enhance collaboration and knowledge sharing in digital environments. Tools in the Microsoft Office suite of applications, such as OneNote, SharePoint, and Teams, or open-source tools, such as Slack and Trello, can help ensure transparency, reduce redundancy, promote continuity across staff roles, and improve end-user support.

Teaff’s collection services team meets weekly. This face-to-face interaction helps build community and ensures clear communication. They also use Microsoft Teams and email for regular communication. Microsoft OneNote has proven helpful for creating documentation, building on the work of a previous faculty member. The cloud-based file-sharing tool Box.com is another system regularly employed for communication and information storage across the university. These asynchronous forms of communication are helpful because the staff all have at least one work-from-home day a week. They also collaborate across teams, meeting regularly with other library stakeholders, such as subject librarians or the staff in special collections and archives.

In earlier positions, Resau encountered environments where communication relied heavily on static tools. For example, at one institution, Microsoft Excel spreadsheets and Word documents were stored in department-shared folders and served as the primary means of documentation. In another role, Resau joined just prior to a major systems migration from Millennium to ExLibris Alma. Although institutional knowledge was abundant, it was dispersed across print notebooks, Word documents, and various siloed files. To address this, Resau developed a shared OneNote notebook that served as a central documentation hub for the collection management unit. Additionally, a cross-departmental

committee focused on e-resources and discovery was established, bringing together staff from collections, access services, and library faculty. This group initially met monthly during the academic year and later shifted to a bimonthly schedule. At another institution, documentation was similarly managed through Word files housed in unit-specific folders. Upon joining the organization, Resau found minimal existing documentation or knowledge transfer practices. As a result, job aids were developed in real time during daily workflows, ultimately forming a *Collection Management Cookbook*—a consolidated guide to local policies and procedures. In a subsequent role, documentation was again limited, primarily existing in Word files. Resau responded by creating an internal Technical Services LibGuide (LibGuides is part of the Springshare suite of products) that served as the centralized repository for workflows and policies. Trello, a visual project management tool, was adopted to support departmental project tracking, and platforms such as Zoom and Microsoft Teams were used for individual and group communication. Resau has used Trello in both a free version and an institutional subscription. When using the free version of Trello, it is important to track only nonsensitive information on the tracking boards. The institutional version has more privacy settings. In a more recent setting, documentation processes have become more integrated. Staff used institutional Microsoft 365 subscriptions to maintain Word files in SharePoint and use a dedicated OneNote notebook organized by key functional areas within collection management. Documentation may appear directly within OneNote or be linked to corresponding SharePoint files. Microsoft Planner supports project tracking, while communication is facilitated through dedicated Microsoft Teams channels: one for general team updates and others for more dedicated discussions. Weekly team meetings are held to share updates, and a dedicated e-resource management meeting occurs monthly and focuses on resource changes, troubleshooting, and usage data.

Effective communication in collection management relies not only on the choice of tools but also on consistent team adoption.<sup>11</sup> When team members use different platforms (for example, one person relying on a note-taking app while others use Word documents or handwritten notes), institutional knowledge may become fragmented, and procedures and policies may be lost or duplicated. Choosing dedicated shared tools ensures transparency, reduces redundancy, and promotes continuity across staff roles. It is also helpful to conduct periodic communication check-ins, ideally in one- or two-year cycles.<sup>12</sup> These reviews can provide an opportunity to evaluate the tools currently used, assess what the institution supports, and identify whether new or updated platforms could enhance how collection-related information is documented and shared. Finally, actively seeking feedback from staff who use these tools is essential.<sup>13</sup> Their insights can lead to improvements in information organization, distribution, and retention, ensuring that communication strategies evolve in line with team needs and institutional goals.

## Leadership Guidance

Leadership requires planning and the creation of a supportive, collaborative work environment. To put these principles into practice, Teaff has implemented various strategies to engage her team, including

fostering learning opportunities and creating professional networks by connecting staff with colleagues at other institutions doing similar work.

In the book *A Starter's Guide for Academic Library Leaders: Advice in Conversation*, Lorelei Tanji recommends having a “clear team charge that outlines the goals, objectives, challenges, deliverables, relationships, responsibilities, reporting, and timelines.”<sup>14</sup> Weekly team meetings can help keep the team’s goals at the front of mind. Other useful advice from the same book is understanding the concept that managers “lead” staff and “manage” schedules, workflows, and budgets.<sup>15</sup> Good managers should encourage professional engagement (e.g., scholarship, service, skill development, and creation of professional networks) and work toward transparency whenever possible to increase trust.<sup>16</sup> It is also important to balance work and make sure that staff are not “overloaded.”<sup>17</sup> Again, weekly meetings or individual check-ins once a month can help to guide this practice. In the chapter “Don’t Do More with Less: Sustainable Work as a Management Value,” Amanda Koziura outlines ways to create an environment where work-life balance is respected by leveraging what managers can control. Koziura emphasizes the importance of developing a management philosophy that prioritizes sustainability. The chapter emphasizes the importance of regularly reviewing and updating job descriptions to maintain equitable workloads across different departments and job classifications. It also discusses the use of student staff to assist with departmental functions and provides strategies for managing position vacancies.<sup>18</sup>

With this advice in mind, Teaff regularly visits other libraries to speak with staff and managers, asking questions about how they manage specific projects or services. They have facilitated site visits to other local libraries for their team, allowing them to meet staff in analogous positions and learn from each other’s expertise and experiences. They also connect their team with other libraries virtually by arranging Zoom or Teams meetings with staff who are willing to consult on tools such as OpenAthens. They encourage their team to collaborate with vendors to enhance training or ask questions about new services. Additionally, they regularly share training and conference opportunities from various listservs or consortia. Because the university also has a law library, there are opportunities for collaboration and networking there. Yearly retreats with law library personnel have become a staple, providing a chance to gather as a community, attend webinars as a group, and learn from each other.

## Conclusion

Managing collection services in small libraries requires a combination of effective day-to-day operations, thoughtful integration of emerging technologies, strategic project management, robust communication practices, and leadership guidance. By adopting flexible and agile strategies, small libraries can enhance their collection management services and better meet the needs of their users. The experiences shared by the authors highlight the importance of continuous learning, collaboration, and adaptation to new tools and technologies. By utilizing these insights, small libraries can effectively manage their collections and offer valuable resources to their communities.

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## CRediT Author Statement

Elizabeth Anne Teaff: Conceptualization, Methodology, Writing – Original Draft, Review & Editing.

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All authors reviewed and approved the final manuscript.

## Notes

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