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Traveling Through Transitions: From Surviving to Thriving

Karen Calhoun

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Traveling Through Transitions: From Surviving to Thriving

Karen Calhoun
Vice President, WorldCat & Metadata Services, OCLC
1. Trends affecting libraries and technical services
2. The evolution of
   • Workflows
   • Metadata
   • Mindsets
   • Competencies
3. Catalogers and metadata specialists
1. Trends affecting libraries and technical services
Top Ten Trends in Librarianship

1. Introspection: Who are we and what value do we bring?
2. Budget pressure, accountability for results, and rising user expectations
3. Growth of consortia and collaborative groups
4. High demand for new skills, esp. IT fluency
5. Restructuring work and jobs
6. Find it and get it (the whole “OPACs suck” debate)
7. Complex, rapidly changing e-information environment
8. Aggregation and data/metadata management: Where do libraries fit?
9. Assessment: Evidence-based decision making
10. Usability and user-centered design; social software; Web 2.0 culture of participation
Over to You!

- What are the top three trends in library technical services?

2 minute exercise
My Top Three

1. Pressure on technical services budgets, manpower, and space

2. Changing, complex technical services landscape

3. Public, international debate on the future and value of bibliographic control
Shrinking Technical Services Staffing

- Source: Cornell University Library CTS FTE counts
- 22% reduction in staff size in 5 years
- Benchmarking survey in June 2002 suggests all ARL TS depts. are hard hit
“Between 1985 and 2000, the number of new hires to cataloging positions dropped 45%, and new professionals by 64.”
—Stanley Wilder, University of Rochester River Campus Libraries


There has been discussion in the cataloging community about a perceived trend of not fully replacing cataloging staff when incumbents leave, or of replacing cataloging staff at a lower salary level. Do you believe this trend exists?

Yes
No
Other

Answer Now
There has been discussion in the cataloging community in Australia/New Zealand about a perceived trend of not fully replacing cataloging staff when incumbents leave, or of replacing cataloging staff at a lower salary level. Do you believe this trend exists?

<table>
<thead>
<tr>
<th>Response</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>64.70%</td>
</tr>
<tr>
<td>No</td>
<td>19.10%</td>
</tr>
<tr>
<td>Other</td>
<td>16.20%</td>
</tr>
</tbody>
</table>
Concerns

- Rising expectations for service
- Diminishing funding base
- Too much to do!
- E-resources
- Metadata and other new job knowledge
- Turnaround time and quality
  - Do it right
  - Do it fast
  - Do it right and fast
## Early 21st Century Technical Services Landscape

<table>
<thead>
<tr>
<th>Bibliographic Control</th>
<th>Desktop (TS Workstation)</th>
<th>Data Management</th>
<th>The Web</th>
</tr>
</thead>
<tbody>
<tr>
<td>New sources/types of records</td>
<td>Network, hardware and software administration</td>
<td>Relational Data Management</td>
<td>Authoring</td>
</tr>
<tr>
<td>New workflows</td>
<td>Integrated library systems</td>
<td>SQL: queries and reports</td>
<td>Publishing</td>
</tr>
<tr>
<td>New metadata standards</td>
<td>Macros; impt. of ergonomics</td>
<td>More data manipulation, less data entry</td>
<td>Web site organization and management</td>
</tr>
<tr>
<td>E-resources and digital collections</td>
<td>Growing number of applications</td>
<td>Global change</td>
<td>Digital library management systems</td>
</tr>
</tbody>
</table>

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[We should] Manage acquisitions and catalog data through batch processes; as much as possible, avoid working on one record at a time.

Strongly agree  16%
Agree  20%
Neutral  30%
Disagree  18%
Strongly disagree  3%

Answer Now
[We should] Manage acquisitions and catalog data through batch processes; as much as possible, avoid working one record at a time (Calhoun report recommendation 4.1.4).

Warren Report Responses

<table>
<thead>
<tr>
<th>Response</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly agree</td>
<td>20.60%</td>
</tr>
<tr>
<td>Agree</td>
<td>47.10%</td>
</tr>
<tr>
<td>Neutral</td>
<td>14.70%</td>
</tr>
<tr>
<td>Disagree</td>
<td>16.20%</td>
</tr>
<tr>
<td>Strongly disagree</td>
<td>1.50%</td>
</tr>
</tbody>
</table>
On the Record

Report of
The Library of Congress Working Group on the Future of Bibliographic Control
Library of Congress Working Group on the Future of Bibliographic Control

“Economics and Organization of Bibliographic Data”
RESPONSE TO BACKGROUND PAPER
Karen Calhoun, OCLC Online Computer Library Center, Inc.
July 9, 2007

ECONOMIC CHALLENGES

1. Productivity. Fred Kilgour’s genius, when he founded OCLC in 1967, was his coupling of the technological breakthrough of the MARC record with the notion of a shared computerized cataloging system for 54 Ohio college libraries [1]. He recognized and removed the redundancy of rooms of catalogers, in library after library, typing cards for the same books [2]. Over time Kilgour’s...
2. The evolution of...

- Workflows
- Metadata
- Mindsets
- Competencies
Themes of the Transition in Technical Services Workflows, 1995-

- More with less
- Streamlined workflows
- Greater use of technology
- Greater integration of acquisitions and cataloging
- Partnerships with vendors
- New roles and responsibilities
  - E-resources licensing and management
  - Metadata services
Some TS Workflow Redesign Principles

- Look at the *whole process* (e.g., selection to ordering to receipt to cataloging to shelf-ready)
- To the greatest extent possible, handle items and records only *once*
- Capture bibliographic data as far upstream as possible (at point of selection/ordering if you can)
- Perform work where it makes the most sense
- Maximize selection/acquisitions/cataloging collaboration
- Maximize use of support staff and students
- Maximize use of technology
Changing Context for Metadata Management

B.W. (Before the Web)

- For finding and managing library materials (mostly print)
- Catalog records (well-understood rules and encoding conventions)
- Shared cooperative cataloging systems
- Usually handcrafted, one at a time

A.W. (After the Web)

- For finding and managing many types of materials, for many user communities around the world
- Many types of records
- Loosely coupled metadata management, reuse and exchange services among multiple repositories around the world
- Multiple batch creation and metadata extract, conversion, mapping, ingest and transfer services
“Traditional cataloging practice is problematic because many communities outside librarianship use metadata—metadata that can and should be reused.”

The challenge for cataloging is to emerge from silos which are already becoming untenable. We must engage with partners in publishing, commerce and rights management to realize the “bibliographic continuum” so that we can reuse metadata created by other constituencies.

Strongly agree  28%
Agree  37%
Neutral  15%
Disagree  1%
Strongly disagree  1%
The challenge for cataloging is to emerge from silos which are already becoming untenable. We must engage with partners in publishing, commerce and rights management to realize the “bibliographic continuum” so that we can reuse metadata created by other constituencies.

Warren Resport Responses

<table>
<thead>
<tr>
<th>Response</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly agree</td>
<td>25.00%</td>
</tr>
<tr>
<td>Agree</td>
<td>57.40%</td>
</tr>
<tr>
<td>Neutral</td>
<td>13.20%</td>
</tr>
<tr>
<td>Disagree</td>
<td>4.40%</td>
</tr>
<tr>
<td>Strongly disagree</td>
<td>0.00%</td>
</tr>
</tbody>
</table>
Mindsets: Not Your Father’s Metadata

Library metadata practices:

Title
Author(s)
Publication details
Pagination, etc.
Series
Knowledge
‘categories’:
  -Classification
  -Subject
ISBN
Etc.

Other attributes:

How/where to get it
Rights
How many sold
How many circulations
Banned anywhere?
Awards won?
Works cited by this one?
Reviews?
  -Publisher
  -Reader
Author information
Other editions
Technical metadata
Identifiers
Related works
Blog conversations
User tags
Derivative works
And on and on …
Mindsets: What is a “Full” Record?

With thanks to David Lankes:
http://quartz.syr.edu/rdlankes/Presentations/2007/ALCTS.pdf
Competencies: What Does Technical Services DO Anyway?

- Acquisitions
- Cataloging
- Serials control
- Catalog maintenance
- Retrospective conversion
- Gifts and exchange
- Metadata services
- E-resource services
- Binding
- Preservation, conservation
- Physical processing
- Other stuff
Technical Services keeps the collections vital and up to date by procuring new library materials and organizing them for easy and convenient use.
“The need to identify, acquire, access, organize, and label packages of information will become more complex. It isn’t the stuff of outsourcing. It’s the stuff of intense development, planning, policy adaptations, and reacquainting ourselves with users.” - Vera Fessler, Associate Director, Fairfax County (Va.) Public Library

Fessler, Vera. 2007. “The future of technical services (it’s not the technical services it was).” Library Administration and Management 21:3, p. 139-
Have any of your catalogers already transferred their skills from traditional cataloging activities to metadata activities?
3. Catalogers and Metadata Specialists


A New Kind of Cataloger

- Examine assumptions
- Lifelong learning
- Be involved with information objects of all types
- Move to next generation systems and services
- Make information (including, but not limited to library collections) more visible and easier to use

http://vivo.library.cornell.edu/
### Table 2: Forecasts and Implications for Metadata Specialists

<table>
<thead>
<tr>
<th>Increasing expertise in discovery and delivery systems</th>
<th>Help build new kinds of systems for IR and delivery; many new kinds of metadata; emphasis on re-use, interconnections, interoperability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active participation in the local community</td>
<td>Blurring of lines between what has been public services and technical services; project and team-based workplaces; <strong>involvement in local community projects and digital asset management</strong>; <strong>consulting work</strong>; decreasing involvement in traditional cataloging duties</td>
</tr>
<tr>
<td>Technology-driven research, teaching and learning</td>
<td>Need for “IT fluency,” esp. metadata specialists; increasing involvement in large-scale digital library research, development, and production projects</td>
</tr>
</tbody>
</table>
“Instead of being a hoarder of containers, the library must become the facilitator of retrieval and dissemination.”—William Wulf, 2003

A New Way to Work

Blakeley, Daniel H.

Cornell Center for Materials Research Facility Staff page
Digitization Projects
<table>
<thead>
<tr>
<th>Disintermediation and user self-sufficiency</th>
<th>Catalog librarians have always served those who want to work autonomously; metadata specialists will also enhance ease of use through expertise in indexing, data organization and management, access vocabularies, taxonomies, ontologies, etc. Rising need for understanding of visualization and other techniques to support browsing. Increasing use of metadata for linking a wide array of information objects</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global infosphere, Web-based information, and multimedia</td>
<td>Metadata specialists will develop/lobby for standards and best practices, but proliferation of systems and object types will continue; continued need for integrating frameworks and interoperability tools</td>
</tr>
</tbody>
</table>
WorldCat Identities

Office of Research initiative

- http://orlabs.oclc.org/Identities/

Now in production!

- Try it at http://worldcat.org

- Search WorldCat > display a title > click “Details” tab > click author name
Be Where Their Eyes Are: Making Library Collections and Services More Visible

- Surface the collections in the spaces users inhabit on the Web
  - Interconnections, interoperability, and information delivery
- Offsite storage and the challenge to browsing
- Much more robust and interconnected discovery and content delivery systems
Derring-do
Discussion

• What are some new competencies that your staff will need?

• What is the single most important thing for your department to accomplish in the next two years?