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Changing Landscape of Technical Services

Kate Seago

University of Kentucky, kseago@email.uky.edu

Marsha Seamans

University of Kentucky, marsha.seamans@uky.edu

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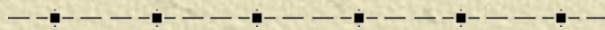
Changing Landscape of Technical Services

Perspectives from Acquisitions and Cataloging

Kate Seago, Director, Acquisitions

Marsha Seamans, Director, Cataloging & Database Integrity

University of Kentucky



The Changing Landscape

- ✦ Technology
- ✦ User Expectations
- ✦ Resources
- ✦ Ownership vs. Access
- ✦ Standards Changing/Developing
- ✦ Our Expectations

Technology

- ✦ New formats
- ✦ New technologies
- ✦ Agile based development
- ✦ Discovery tools
- ✦ Next Generation Systems
- ✦ Open Source Software

User Expectations

- ✦ Just in time
- ✦ Delivery where they are
- ✦ Options for Discovery
- ✦ Open Access

Standards Changing or New

- ✦ Global Knowledge Base
- ✦ NISO standards
- ✦ Changing Cataloging Rules
- ✦ Ability to handle items that may not have MARC records

Our Expectations

- ✦ Generational Differences
- ✦ Collection Development
- ✦ Just in Time vs. Just in Case
- ✦ Patrons will use our interfaces

ACQUISITIONS VIEW

- ✦ Electronic resources
- ✦ Shift from Ownership to Access
- ✦ Budget Constraints
- ✦ Skill sets
- ✦ Electronic serials and databases primary
- ✦ Demand driven options

Acquisitions Skills

- ✦ Accuracy
- ✦ Communication
- ✦ Repetitive Tasks
- ✦ Good Penmanship
- ✦ Reliable
- ✦ Follow Directions
- ✦ Problem solving
- ✦ Reference skills
- ✦ Internet Shopping
- ✦ License Reading
- ✦ Problem Solving
- ✦ File Management
- ✦ Technology
- ✦ Workflow Management

Transitioning Staff

✦ Training

✦ Experimentation

✦ Trials

✦ Taking Chances

✦ Incremental Changes

✦ Finding the Niche

Organizational Change

- ✦ Strategic hire staff as positions open
- ✦ Look at the entire organization
- ✦ Staff development
- ✦ Develop culture of change

Demand Driven Acquisitions

- ✦ ILL Requests

- ✦ Load records

- ✦ Users decide which items the library buys

- ✦ Threat to core collections?

- ✦ Opportunities to better serve our users

LANDSCAPE OF CATALOGING

✦ Relevancy

✦ Efficiency

✦ RDA

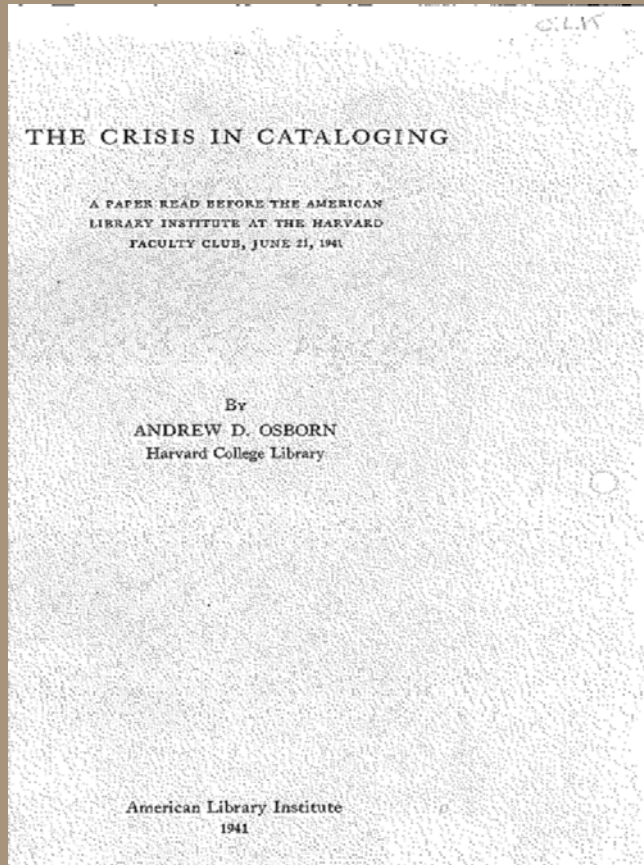
✦ More digital and electronic formats

✦ Hidden Collections

✦ Outsourcing

✦ Staffing / Budgetary constraints

Relevancy /Future of Cataloging



- “Day of the legalistic, perfectionist, or bibliographic cataloger is over; the day of the pragmatic cataloger has begun”
 - All cataloging practices and conventions should be meaningful
 - Organizational structure, streamlining, centralizing important

What are we called

- ✦ Data Management and Access ; Access Records Management
- ✦ Resource Access ; Resource Description & Access Dept.
- ✦ Collection Management & Metadata Services
- ✦ Resource Services & Technology
- ✦ Digital Service & Strategies ; Digital Services
- ✦ Logistics & Resources Distribution Services
- ✦ Educational Resources Support
- ✦ Metadata Development
- ✦ Technical Services ; Collection Services ; Information Access Services
- ✦ Cataloging & Database Integrity
- ✦ Digital Initiatives ; E-Resources

Strategies

Services

Service Resource Technology
Integrity Educational
Dept Digital Data
Collection Technical Resources
Database E-Resources Records
Metadata Management
Cataloging Development
Logistics Description
Distribution Initiatives
Support Access
Information

... But What's in a Name

- ✦ Reflects new responsibilities for cataloging along with traditional tasks
- ✦ Work has to change along with the name
- ✦ Catalogers – link in the chain that helps get information where it needs to be

RDA : Resource Description and Access



- ✦ “Another layer in the continuum of records in the library catalog” (Winjum, TSQ 30:2(2013))
- ✦ Catalogers add controlled vocabulary & classification (value)
- ✦ Catalogers need to know what is going to be different in how they prepare records and organize the catalog

Implementing RDA

- ✦ “RDA is very easy for cataloging books” (Bothmann, OLAC Preconference 2012)
 - Start playing with it!
- ✦ Learn to let go (of rules) (of past) (of pretty)
- ✦ OCLC: Don’t change AACR2 >< RDA
- ✦ Take what you see, Accept what you get
- ✦ Un-Learn MARC speak
 - “metadata elements”
- ✦ Plan – create an implementation calendar
 - Look at what others have done, and thank them!
 - Who will learn, who will teach, when will you start

Decreased print/Rise of E- Everything

- ✦ Develop and document workflows
- ✦ Update skill sets of catalogers
- ✦ Batch Processing
- ✦ Vendor records
- ✦ Provider neutral records

Hidden collections

- ✦ Finding, identifying, prioritizing
- ✦ Expose accessioned collections and digital collections
- ✦ Collaborative retention initiative agreements
- ✦ Work closely with special collections/archives to create metadata and develop crosswalks

Outsourcing

- ✦ Throw out assumptions, both in-house expense and outsourcing “evils”
- ✦ Re-evaluate validity of local exceptions
- ✦ Always sample batches and packages
- ✦ Have agreed-upon quality control procedures
- ✦ Considering “in-sourcing”
 - If special handling is required, may be cheaper to do in-house
- ✦ Assess and reassess blend of in-house and outsourcing
- ✦ Use your cataloger hours wisely!

Metadata skills

- ✦ Consultative or active
- ✦ Describing digital resources & collections
- ✦ Deciding what metadata to use
- ✦ Maintaining data; Providing consistency
- ✦ Controlled vocabularies
- ✦ Catalogers are skilled in following standards, paying attention to detail, project management, organization and the ability to make information easier to find

Staffing

✦ Less likely that cataloging positions get filled

✦ Important to assess the skills present and hire for new skills

(Traditional materials + Digital/Electronic materials + Hidden Collections + Discovery Layers) – (Staff) = Repurposing

ROLE OF THE MANAGER

- ✦ Articulating value-added roles
- ✦ Advocating for department needs
- ✦ Monthly/Quarterly/Annual reports that document department's achievements
- ✦ Communication
- ✦ Documentation
 - “Well run departments in technical services have documentation for every policy, every task, and every procedure” (Branton, Mississippi Libraries (2003))

More roles

- ✦ Know the experience, expertise, strengths and interests of staff, as well as their weaknesses
- ✦ Carefully written job descriptions
- ✦ Repurposing staff; hiring for new skills
- ✦ *“It takes a special kind of courage to want to supervise & motivate others toward a common goal”* (Branton, Mississippi Libraries (2003))

Resources

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QUESTIONS?