

Threats to and Opportunities for Technical Services Departments: Report of the ALCTS
Technical Services Administrators of Medium-Sized Research Libraries Discussion
Group, ALA Annual 2006

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The ALCTS Technical Services Administrators of Medium-Sized Research Libraries Discussion Group discussed several topics within an overarching theme at the 2006 annual conference in New Orleans: “Threats to and Opportunities for Technical Services Departments”. Topics discussed within that general theme included: Future of the Catalog, Future of Cataloging as a Profession, Library of Congress Series Authority Record Decision, Managing Change, and Electronic Resource Management.

Approximately 35 attendees participated in a roundtable discussion format, with individual tables devoted to particular topics. Many thanks to Erin Stalberg (University of Virginia), June Schmidt (Mississippi State University), Lori Kappmeyer (Iowa State University), Cecilia Leathem (University of Miami), Jack Hall (University of Houston) and Don Chatham (ALA) for recording the table discussions; much of their prose is faithfully reproduced below by the very appreciative author/compiler.

Future of the Catalog

The two tables with the most participants were those dealing with the future of the catalog and the related topic of the future of cataloging as a profession. The Future of the Catalog table discussed the changing notion of what the catalog is and can be, particularly in terms of its relation to the wealth of other finding aids libraries provide. The table discussed the current state of the catalog including the many features common in catalogs today that were not available a few years ago including new book lists, patron suggestions, live links to many resources (reserves, university course sites and professors’ sites, tables of contents, book reviews, video and sound files, other library catalogs and vendors), book jackets, new search capabilities such as correction of

misspellings and retrieval of “close” hits, various relevancy ranking options, and manipulation of search results (create citations; save, output, print, email results).

The table agreed that the catalog of the future will handle new metadata systems besides MARC and Dublin Core, such as the Text Encoding Initiative (TEI), VRA core from the Visual Resources Association, National Spatial Data Infrastructure (NSDI) from the FGDC (Federal Geographic Data Committee, and MODS (Metadata Object Description Schema. Some academic libraries are already using innovative OPAC interfaces such as Endeca and Red Light Green. The catalog of the future will provide all of these, and respond to new developments being pioneered by WorldCat, Amazon, and Google.

Some participants in the group argued strongly that such developments will grow even more pervasive in the coming years. We should be questioning the place of the catalog in the universe of resources our users need to find materials of all kinds, whether the library owns them or not. What we are used to seeing as one ILS should be broken up into the more technical services modules of acquisitions and serials control on one side, with the “catalog” being linked closely to other resources such as WorldCat, Amazon, and Google.

Future of Cataloging as a Profession

Marjorie Bloss, RDA Project Manager, was in attendance at this table. Most of the table’s discussion centered around the development and application of RDA. Marjorie gave an overview of the development of RDA and the timeline for its expected

completion. Part 1 was released before Midwinter and comments were accepted through spring. The Joint Steering Committee (JSC) met in April and reviewed constituency comments. Chapters 6 and 7 (of what is now referred to as Part A) were made available for review just before Annual. Publication is intended for mid-2008. Marjorie reported that they do not expect updating of pre-RDA records to be necessary after RDA is in place. Some sections of the community think that RDA is too radical in its attempt to simplify the rules and extend them beyond traditional print materials. Other sections of the community think that RDA is not nearly radical enough and does not sufficiently meet the needs of the non-MARC (and non-library) metadata communities. They are talking to vendors about integrating RDA into ILS systems.

The table discussed the desired functionality of the online product. Some table participants expressed the need for the product to be customizable for cataloging of specific formats; for example, map or music catalogers should be able to see rules that apply to only those formats.

Marjorie reported that the JSC is considering the idea of an RDA-lite or creation of application profiles for specific communities. They are looking for suggestions on what these might look like and how they would be applied. She took questions about the rules and their development. General discussion surrounded the feasibility of the use of RDA in the non-MARC metadata communities and concerns surrounding the timeline of implementation and availability of training: If the product is not released until mid-2008 and training/implementation begins then, when can we realistically believe that RDA will

be fully implemented in libraries? Another concern expressed is that RDA has lots of options. What does it mean for sharable records if we all opt to apply the rules differently?

Managing Change

The managing change table discussed the changes that are taking place at their institutions and the ways they are coping with the changes, focusing particularly on staff turnover and retirements, keeping up with changes to the profession and technology, and staff involvement in organizational change. At one library there has been major turnover in key positions that could drastically affect services the library offers. Another is undergoing major organizational change simultaneous with the replacement of an administrator. All the participants described the difficulty of keeping up-to-date with technology and changes in the profession. At one library, listserv membership and tracking is assigned to particular staff that are charged with reporting important announcements and discussions to others in the department.

The degree to which staff have input in the changes of organizations varies among table participants. At one library, Technical Services staff reorganized the department as necessary to undertake a transition to a new vendor's services and to replace the work of a long-term clerk without additional staff. At another, staff struggle with the fact that they are not being asked for their input regarding the hiring of key positions, especially since they have been asked for their input in the past. Other libraries report that staff are given ample opportunity to participate in organizational change decisions and that the

participation enhances willingness to change. At one, cross-training is used as a method of keeping staff challenged, up-to-date, involved in the larger organization, and more oriented toward providing quality service.

Library of Congress Series Authority Decision

Library of Congress' decision to no longer create and maintain series authority records (SARs) beginning June 1, 2006 was a hot topic of discussion at many technical services related meetings at the conference. This discussion group was no exception. Table participants agreed that LC has the right to make decisions affecting their own workflows, but that they should have been more cognizant of the effect of the decision on other libraries, particularly PCC participants. Most table participants agreed that the decision would result in more work for their cataloging departments, although the libraries varied on the degree to which the decision would affect their departments and patrons' ability to locate materials that are part of series.

There was general acknowledgement that patrons are heavily reliant on keyword searching and do not do sophisticated searching of the catalog. One library that has a separate series title index reported minimal use of that index by searchers. Most of the participants intend to continue to use SARs as a source of information regarding their libraries series treatment decisions including information such as whether a series is traced, analyzed and classed together or separately.

Two libraries said they now check series headings in LC records and continue to create series authority records. Two other libraries that receive most of their books shelf-ready from vendors will follow LC's lead and discontinue the practice of maintaining series control. They explain that they simply do not have enough staff to check the records. They will continue to accept LC cataloging without review although one of these libraries will continue to create author-title series records, since that series type is more problematic. Another acknowledges that tracking series issues that are bound together is a problem in the wake of the LC decision. One library that outsources authority control reported that their vendor will flip 490_0 headings to 440s. Most libraries at the table had not yet discussed the decision with other departments although one library plans to discuss it in the context of focus group examinations of OPAC issues that are routinely conducted.

Electronic Resource Management

Table participants had no experience implementing an ERM system, so discussion focused primarily on criteria for selection of a system and some of the critical issues in the decision to adopt ERM software. Criteria and critical issues discussed by the table included: cost, size of collection, current ILS, information from references and the importance of developing a set of questions to ask vendors. It was agreed that libraries should talk to references not provided by the vendor. Libraries should also talk to other libraries that use the same ILS. Participants also discussed the importance of developing a set of questions to ask each reference because responses to the same questions will give

you some insight into the value of the system for your library's needs. Vendors should be invited to give on-site demonstrations and spend time with staff.