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OCLC Systems & Services

International digital library perspectives

**Open source ILS/OPAC
implementations**



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OCLC Systems & Services: International digital library perspectives

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Open source ILS/OPAC implementations

Editor

Bradford Lee Eden

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Toby Burrows

Principal Librarian, Scholars' Centre, University of
Western Australia Library, Australia

H. Frank Cervone

Vice Chancellor for Information Services, Purdue
University Calumet, USA

Eugene Fieg Jr

Cataloguer, Claremont School of Theology Library,
USA

Robert Fox

Library Information Systems – Hesburgh Libraries,
University of Notre Dame, USA

Norm Medeiros

Associate Librarian of the College, Magill Library,
Haverford College, USA

Andrew K. Pace

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OCLC, USA

Ian Witten

Professor, Computer Science, University of
Waikato, New Zealand

Frederick Zarndt

Global Connexions, USA

Note from the publisher

Note from the
publisher

A new company descriptor takes us into a new era

I attended a number of very different conferences over the course of 2010, including the American Sociological Association, Global Business School Network, British Academy of Management and the inaugural conference of the International Services in Emerging Markets. What struck me forcibly at each event was how often I was asked about books and journals that I would not have automatically associated with that particular event. I have talked about rapid prototyping to sociologists and teaching languages to service managers. Of course this can mean that we do not always have the precise book or journal to hand for that discussion, but more positively it also underlines how inter-disciplinary the research contained in each title has become.

Emerald has been associated with business and management research for the last 44 years and over the last ten years has been proud to call itself the “World’s leading publisher in management research”. It is very much our intention to continue to build our brand as the world’s leading publisher of management research and we have a number of plans in place to strengthen our position in business and management.

However, eagle-eyed readers will have noticed that Emerald has developed a new company descriptor. We are: “A leading independent publisher of global research with impact in business, society, public policy and education.”

As we move into different subject disciplines, including education, sociology, linguistics, engineering and transport, our new company descriptor captures this position. In addition, we have always been committed to publishing “research you can use” and we hope this descriptor explains what we do and what we represent more explicitly.

We are independent because we are still owned by one of the original founders. This means that we can invest for the long term rather than for shorter-term shareholder returns. We also stress the importance of being truly international in the research we publish. We are not parochial and do not impose any specific research methodologies. We actively encourage excellence for all parts of the world and across academia and practice. We also want to highlight that we see research having an impact in different ways. It is important that application is considered in practice, in the classroom but also how research can impact on society and the economy in a wider context and a more long-term way.

For these reasons we see Emerald entering a new phase in its development. We are positioning the publishing teams so that they understand the different subject disciplines and communities better. We can take advantage of the growing strengths we have in a number of subject areas and encourage the cross-fertilisation of ideas and research that shapes future research and generations.

Rebecca Marsh

Publishing Director, Emerald Group Publishing Limited

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ON THE DUBLIN CORE FRONT

Transformation: next generation technical services at the University of California Libraries

Norm Medeiros

Associate Librarian of the College, Haverford College, Haverford, Pennsylvania, USA

Abstract

Purpose – This paper seeks to feature an interview with Brad Eden, Associate University Librarian for Technical Services and Scholarly Communication at the University of California, Santa Barbara. Eden discusses the University of California Libraries' Next Generation Technical Services initiative.

Design/methodology/approach – The paper notes changes necessary to transform technical services for the new digital realm.

Findings – The task force chaired by Eden recommends several changes to traditional processes, three of which are central to achieving transformative change.

Originality/value – The paper offers readers insights into the means by which a large consortium under severe financial constraints is attempting to achieve cost-savings and value-added services through system-wised collaboration.

Keywords University libraries, Technical services, Outsourcing, Collections management

Paper type Research paper

Google is going to become the library of the world (Brad Eden)[1].

Readers of this column, as well as individuals who follow the evolving landscape of that library art traditionally known as cataloging, remember the splash the University of California (UC) Libraries made with their 2005 report, "Rethinking how we provide bibliographic services for the University of California" (University of California Libraries, Bibliographic Services Task Force, 2005; Medeiros, 2006). The UC report noted several areas where library systems were deficient, especially compared to the capabilities and ease-of-use delivered by Amazon and Google, and how without drastic change libraries would risk losing relevance, particularly with respect to undergraduates. Building on this work, the UC Libraries have recently implemented the next generation technical services (NGTS) initiative, an ambitious project that seeks to "transform" technical services through greater system-wide collaboration[2]. The editor of *OCLC Systems & Services: International digital library perspectives*, Brad Eden, is the Associate University Librarian for Technical Services and Scholarly Communication at the University of California, Santa Barbara, and chair of one of the NGTS task groups, "Enterprise-Level Collections Management Services." This group's charge is expansive, and it comes at a time when UC's financial and human resources are constrained[3].

Recently I spoke to Brad about the NGTS project, the work of his task group, and the general direction of technical services in academic libraries.



NM: The University of California Libraries are investigating the feasibility of system-wide collaboration in technical services areas. What was the motivation for this initiative?

BE: The state of California is doing poorly in economic matters right now. We anticipate the coming year will be the same, if not worse. There are a lot of opportunities to do things we've talked about in the past, but because of the organizational culture we weren't able to move forward. Now, because of the economic climate and our scarce human resources becoming even scarcer, we need to figure out priorities.

NM: How do initiatives such as this emerge within the UC system?

BE: They come from the university librarians, who meet each month. The ULs establish these initiatives by creating an executive team, which is the overall management body. The executive team then constitutes a steering team, which is the group that deals with the practical everyday issues that keep the project moving forward. These two teams read the reports of the various task groups and send their recommendation to the university librarians.

NM: Are you aware of other universities or consortia that are doing work similar to UC's next gen project?

BE: The statewide University of Maryland libraries have been looking into this. So has Columbia and Cornell with their 2CUL project. The OhioLINK libraries are also trying to consolidate services. These are the only one I know about, but I think such studies are going on all over the place.

NM: One of the challenges, however, to consolidating functional areas in technical services is in the number of materials that need to move among libraries, which works against getting the items into the hands of users as quickly as possible

BE: In the UC system we have a productive courier service, since we have two regional print repositories, one at UC Berkeley and one at UCLA. So we've been looking at shared print for a few years now. Next Gen Tech Services is about determining where we want to strategically position ourselves in the future. We don't want to be focusing on the print. We have all these special collections and digital resources that are getting no attention, but we see them as important for the future, but yet we're not changing the traditional model. Next Gen is looking at how we can make print processing as efficient as possible so we can move into these areas that we aren't giving any attention to.

NM: You have been appointed Chair of the "Enterprise-Level Collections Management Services" task group, one of three task groups that comprise Phase Two of the Next Generation Technical Services initiative. Describe the charge of your group and your expected outcomes?

BE: You can see from the charge we have a big plate. I think it's exciting. Four task groups as part of the Phase One work produced reports that the University Librarians reviewed. These reports informed the Phase Two part of Next Gen, resulting in three current task groups. My group is looking at making technical services processes more holistic and aligning them with the digital. We've had twice weekly conference calls since early June. Right now I'm writing a draft final report, due in a few days. The university librarians want to move forward quickly on the recommendations.

NM: The way libraries do business has fundamentally changed as a result of the economic crisis. Yet the crisis offers us an opportunity to make transformative changes

BE: Yes. This is a unique opportunity for us. We shouldn't be spending 80 percent of our time on materials we can outsource. We'll never go back to the staffing levels we had before, even when the economy turns around. The concept of investing in library personnel will never happen again.

NM: The Next Generation Technical Services scope statement lists eight values that will be assessed in order to determine whether a truly transformative model of collaborative technical services can be achieved. The first value is "speed processing throughout all technical services functions." This has been a theme of technical services for generations. How can UC achieve it?

BE: The first step is to outsource English language print materials. There's no reason why any tech services department needs to be touching these materials. Outsourcing to vendors can do this much more cheaply than paying catalogers to futz around with bibliographic records that are already OK. It's the whole concept of good enough. A record does not need to be full, it does not need to be perfect, it does not need to have lots of extra stuff. We've done the analysis to show that users couldn't care less about this added stuff.

NM: How is UC planning to evaluate what is a "good enough" bibliographic record?

BE: We have a number of backlogs we'd like to eliminate immediately. The only way to do this is to establish a good enough record. There can't be any discussion, we can't have collections folks coming to us about it. It must be top down. The ULs have to state that this recommendation is going to be implemented, and that there's no room for change. Then the AULs need to enforce it. Otherwise we'll continue down the same road.

NM: Do you think outsourcing all English language print materials would provide enough staff time to tackle the hidden collections?

BE: Before the NGTS was formed, I chaired a task group on system-wide shelf ready. We did an analytical study on the upfront investment necessary to implement system-wide shelf ready for all ten institutions, and how much cost savings it would yield going forward. This will be one of major recommendations to the university librarians. There are recommendations that depend on each other in order to be transformative. The three that we have to implement in order to begin to catalog our special collections are system-wide shelf ready; elimination of the non-Roman backlog through a "centers of excellence" approach, where libraries with certain language expertise could centralize this cataloging; and the good enough record standard.

NM: What else is your task group considering?

BE: Another recommendation in this tier of recommendations is to move to the OCLC Web-scale Management Services as a system. We need to get rid of our local systems. We need to move up to the network level and work at the network level. It's the future. OCLC should have done this 40 years ago. We're also thinking about moving serials management to the system level for print. A lot of technical services staff are dedicated