Welcome!
The webinar will begin at 2:00 Eastern/11:00 Pacific
Audio Tips

Today’s audio is streaming to your computer’s speakers or headphones.

**Too loud or soft?** Adjust volume level in the Audio broadcast box:

Lost all sound? Hear an echo? Select *Leave Audio Broadcast* or click X to close box(es). Then rejoin.
Need Help?

Please post technical support questions into the Q&A Panel.

Step 1: Type problem in the dialog box.
Step 2: Click Send.
Use **Chat** to talk with attendees and presenters about the topic.

Do not post technical questions to Chat.

And tag your tweets: #goodgreatcat
Customize your experience

Panels can be minimized or expanded

Hover over edge of panels to drag and resize
Closed Captioning is available

- Open **Media Viewer** from Panel options.
- Adjust **font**.
- Select **Show/Hide Header**.
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Step 2: Call the toll-free number provided.
Step 3: Enter "#" following Access Code and Attendee ID.
Remember to post to Q&A panel if you need technical assistance.

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Phone: 1-866-229-3239
Today’s Producers

Jennifer Peterson
WebJunction
Community Manager

Sharon Streams
WebJunction
Senior Manager, Community Services
Today’s Presenters

Daphne Kouretas
Member Services Consultant, OCLC

Helen Heinrich
Cataloging Coordinator, California State University, Northridge

Debbi Dinkins
Head of Technical Services, Stetson University
Cataloging Efficiencies that Make a Difference

Daphne Kouretas
Member Services Consultant
OCLC
We work with the community of libraries, museums, archives and cultural heritage organizations to provide regional connections to OCLC through:

- Visiting Member libraries
- Conducting and participating in regional events
- Attending state and national conferences
- Speaking on a variety of topics
- Coordinating special projects
Member Services - expanding regional connections

Eric Forte
Member Services Consultant

Chris Martire
Director, Member Services

Daphne Kouretas
Member Services Consultant

Carole Myles
Member Services Consultant
Good Practices for Great Outcomes: Cataloging Efficiencies that Make a Difference

- Metropolitan Museum of Art
- University of Washington and Chemeketa Community College, OR
- DC Public Library
- ALA Midwinter, San Diego
- Huntington Library, Art Collections and Botanical Gardens
Good Practices for Great Outcomes: Cataloging Efficiencies that Make a Difference

- Dr. Martin Luther King Jr Library - San Jose, CA
- Florida Southern University
- University of Texas at Dallas
- Texas State University - San Marcos
- University of Hartford
Good Practices for Great Outcomes:
Cataloging Efficiencies that Make a Difference

Armnda Barone, Head of Original Cataloging at UC Berkeley  Sharon Benamou, Hebraica/Judaica and Music Catalog Librarian, UCLA  Catriona Cannon Assistant Director, Collections and Resource Description, Bodleian Libraries, University of Oxford  Christopher Cole, Associate Director for Technical Services at the National Agricultural Library  Jee-Hyun Davis, Head Librarian, Cataloging & Metadata Services, University of Texas at Austin  Debbi Dinkins, Head of Technical Services, Stetson University  Peggy Firman, Associate Director for Resource Management Services, University of Puget Sound  Jennifer Gordon, Head of Electronic Resources Team, University of Texas at Dallas  Sally Grucan, Head of Cataloging at Wesleyan University  Richard Hasenyager, Director for Library Services, North East Independent School District, San Antonio  Helen Heinrich, Cataloging Coordinator, California State University, Northridge  Lai-Ying Hsiung, Head of Technical Services, UC Santa Cruz  Joseph Kiegel, Head, Monographic Services, University of Washington Libraries  Sally Lancaster, Cataloging Manager, Alameda County Library  Shawne Miksa, University of North Texas College of Information  Jeanne Piascik, Cataloging Librarian, University of Central Florida  Andrea Puccio, Senior Library Associate, Metropolitan Museum of Art, Thomas J. Watson Library  Paivi Rentz, Head Acquisitions Librarian, Texas State University-San Marcos  Elaine Sanchez, Head Cataloging Librarian, Texas State University-San Marcos  Karen Schneider, Director of the Cushing Library at Holy Names University  Joseph W. Scott, Music Catalog/Metadata Librarian at the University of Connecticut  Laura Smart, Metadata Services Manager, Caltech Libraries  Daniel Starr, Associate Chief Librarian, Metropolitan Museum of Art, Thomas J. Watson Library  Holly Tomren, Head of Monograph, Electronic Resources and Metadata Cataloging, UC Irvine  Felicia Uhden, Manager, Technical Services, The Seattle Public Library  Beth Walters, Head of Cataloging, Fort Worth Library  Kendall Wiggin, Connecticut State Librarian  Karen Winkle, Catalog Management Librarian, Embry-Riddle Aeronautical University  Stefanie Wittenbach, University Librarian at the brand new Texas A&M-San Antonio library  NJ Wolfe, Library Director, Fashion Institute of Technology Library
Good Practices for Great Outcomes: Contributors who Make a Difference

Armnda Barone, Head of Original Cataloging at UC Berkeley
Sharon Benamou, Hebraica/Judaica and Music Catalog Librarian, UCLA
Catriona Cannon Assistant Director, Collections and Resource Description, Bodleian Libraries, University of Oxford
Christopher Cole, Associate Director for Technical Services at the National Agricultural Library
Jee-Hyun Davis, Head Librarian, Cataloging & Metadata Services, University of Texas at Austin
Debbi Dinkins, Head of Technical Services, Stetson University
Peggy Firman, Associate Director for Resource Management Services, University of Puget Sound
Jennifer Gordon, Head of Electronic Resources Team, University of Texas at Dallas
Sally Grucan, Head of Cataloging at Wesleyan University
Richard Hasenyager, Director for Library Services, North East Independent School District, San Antonio
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Sally Lancaster, Cataloging Manager, Wabash College Library
Shawne Miller, University of North Texas College of Information
Jeanne Mazzetti Cataloging Librarian, University at Buffalo
Andrea McCoo, Senior Library Associate, Metropolitan Museum of Art
Thomas J. Watson Library
Paivi Rentz, Head Acquisitions Librarian, Texas State University–San Marcos
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What did we learn?
What are people talking about?

- RDA
- Workflow: processes and tools
- Workflow: restructuring and reorganizing
- Leveraging data
- Managing e-collections
- Outsourcing
- Change, change, change
Who’s talking about...

Quality

Joseph Kiegel
Debbi Dinkins
Sally Grucan
From OCLC: Glenn Patton,
Karen Calhoun, Roy Tennant
Who’s talking about…

Upstream cataloging

Stephanie Wittenbach
Lai Ying Hsiung
Helen Heinrich
Laura Smart
Peggy Firman
Managing change

Karen Schneider
Helen Heinrich
Stephanie Wittenbach
Jee Davis
NJ Wolfe
OCLC has launched a series of free member events, Good Practices for Great Outcomes: Cataloging Efficiencies that Make a Difference. These events bring librarians together to discuss and share good practices for achieving cataloging efficiencies by tapping the collective wisdom of a very informed group of OCLC members. These events provide a great opportunity for us all to learn, debate, and obtain practical tips to become more efficient. They explore many topics, such as what is “good enough” cataloging, the benefits of using OCLC WorldCat Cataloging Partners, streamlining workflows and the latest on RDA and WorldCat quality.

Upcoming events

- **26 May 2011**
  University of Hartford, West Hartford, CT

- **14 June 2011**
  Cataloging Efficiencies that Make a Difference Webinar

Past events

Explore presentations and other materials from our past events →

Three themes: communicate, collaborate, cross-train

At the Tuesday 29 March iteration of “Good Practices for Great Outcomes: Cataloging Efficiencies that Make a Difference” at the Martin Luther King, Jr. Library in San Jose, librarians in small-group discussions tackled the tough questions in tech services today: How...

Managing Positive Change in Technical Services

The Big Lebowski and beer. If you want to know what they have to do with managing change in technical services, you'll have to watch Karen Schneider’s closing remarks at OCLC’s Good Practices for Great Outcomes” event on Cataloging Efficiencies...

Answering each others’ questions

“Good Practices for Great Outcomes: Cataloging Efficiencies that Make a Difference” drew 117 tech services librarians from across Southern California to the Huntington Library on 23 March.
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Latest from blogs

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Past events: Good Practices for Great Outcomes

Cataloging Efficiencies that Make a Difference

This event series has brought OCLC members together to explore new ways of working in cataloging and technical services. From sharing information about the latest trends in workflows to practical tips and tricks using OCLC services, each event features local member librarians, who demonstrate how members can—and are—improving processes to boost efficiencies throughout their organizations. Each event also includes interactive roundtable discussions, where all participants examined and talked about ideas and tips and changes they might try at their own library. We thank our generous co-hosts for providing the venues and assisting to make these regional events a success!

20 May 2011
University of Hartford; West Hartford, Connecticut

Kendall Wigg., Connecticut State Librarian, and David Whitehair, Senior Product Manager at OCLC, will keynote at this lively, interactive OCLC member event, generously hosted by the University of Hartford Libraries. We also featured speakers from our member community, including:

- **Sally Grucan**, Head of Cataloging at Wesleyan University
- **Joseph W. Scott**, Music Catalog/Metadata Librarian at the University of Connecticut

Presentations will be posted soon.

06 May 2011
LBJ Student Center; Texas State University-San Marcos; San Marcos, Texas
What’s next?

Monday 27 June, 8.00-10.00

ALA in New Orleans!

Bradford Lee Eden, UC Santa Barbara
Further information

Check out what’s included in your cataloging subscription:

Join the OCLC-CAT mailing list
https://www3.oclc.org/app/listserv/

Contact OCLC Support
support@oclc.org  1-800-848-5800
Check out the OCLC Training Portal
http://training.oclc.org

Browse our free online tutorials for Connexion

And CatExpress
Thank You!

Daphne Kouretas
daphne_kouretas@oclc.org
1-800-848-5878 ext 4060
Helen Heinrich, California State University, Northridge

Organizing a Reorganization of Technical Services
California State University, Northridge

- **Campus**
  - 36,000 students (undergraduate and graduate)
  - 4,000 Faculty and Staff

- **Oviatt Library**
  - 1.4 million volumes
  - 300,000 e-books
  - 57,000 e-journals
  - 120 A&I and full-text databases

- **Technical Services Staff**
  - Acquisitions/Materials Processing/Bindery (6 f/t staff)
  - Cataloging/Database Maintenance (1.5 librarians, 9 staff)
  - E-Resources (1 librarian, 1 staff)
  - 5 p/t student assistants
Workflow Redesign: 4Rs

- Review
- Revise
- Results
- Reorganize
Review

- Mandate from library administration
- Staff interviews
- Internal workflow audit
- External audit: regulations, new technology
- Cost analysis:
  - Money and/or time savings in outsourcing?
Revise

- Streamline and simplify procedures
- Eliminate duplication
- Eliminate unnecessary tasks:
  - “Less work, not more people!”
- Adjust quality standards to reality
  - “Online Catalogs: What Users and Librarians Want, an OCLC Report”
- Principle of “low hanging fruit”
- Maximize use of staff expertise
- Aim for “one-touch” handling; provide cross-training
- Trust and leverage technology
Reorganize

- Consolidate functions
- Reinforce communication
- Eliminate fragmentation within the department
- Trust your colleagues’ expertise
  - From the expectation of a mistake to the expectation of correctness
- Abandon perfectionism
- Ensure continuity of efficiencies throughout the cycle
Workflow Changes

- Paced spending evenly throughout the year
- Consolidated vendors
- Implemented electronic ordering and invoicing (EDIFACT)
- Discontinued outdated auditing trail practices
- Implemented automated copy-cataloging with WCP (PromptCat)
- Reduced claiming & filing
- Simplified physical processing
- Outsourced some materials processing
Results of the Reorganization

- Manual transactions saved: 12,000 /year
- Bibliographic searches saved: 7,000 /year
- Overall savings: 3 months of FTE / year
- No backlog
- Elimination of three positions (through attrition)
- Reduction in student employee budget: 50%
- Reduction in turnaround time from receipt to shelving: 75%
- 2009 CSUN Team award
Origins of change resistance:

- Job insecurity
- Lack of trust
- Insecurity in one’s skills and ability to learn
- Coasting
- Low turnover
  - Pros:
    - base of experience, no training costs, stability
  - Cons:
    - Outdated practices (build up of procedures, unawareness of changes)
    - Comfort zones: “We’ve always done it this way!”
    - Varied technological acumen
    - Lack of innovation
Combating Change Resistance

- Find the change leader
- Designate a core group
- Explain the goal of reorganization
- Present a big picture
- Provide reassurance
- Empower staff
- Communicate regularly
- Provide training
- Assess and adjust
- Document changes
Going forward

- Walk the talk: keep the changes current
- Take responsibility for continuing innovation
- Make annual/biannual evaluations
- Leverage vendors’ knowledge
- Keep enthusiasm high
Questions?

Helen Heinrich
helen.heinrich@csun.edu
ELECTRONIC FORMATS: YOU JUST HAVE TO LET GO
STETSON UNIVERSITY LIBRARY

- 500,000 physical volumes
- 2,500 - 3,000 physical titles added per year

Staffing
- 1 full-time cataloging librarian
- 1 full-time paraprofessional cataloger
- 1 full-time government documents cataloger
- 1 librarian cataloging electronic formats part-time
ELECTRONIC FORMATS AT STETSON LIBRARY

- Ebooks – individual and collections
- Ejournals – Individual and collections
- Streaming Audio – collections
- Streaming Video -- collections
February 2008

- Added Academic Collection with (at the time) 40,000 ebook titles with unlimited use
- Ebrary supplied the MARC records
  - Issues with MARC records included
    - Authority Work
    - Subject headings
    - Series titles
Cataloging 40,000 titles
- Split records into smaller groups of 5,000 titles each
- Make it an ongoing project for cataloger “down time”

- This approach worked well for a few months
- And then ...
OH NO!!!
- Ebrary added 4,000 titles to the Academic Collection over the summer.
YOU JUST HAVE TO LET GO!
ADVANTAGES OF “LETTING GO”

- No stress about adding large numbers of records. Records are “good enough” even without authority control.
- Users are still finding and using the e-resources (use numbers are high)
- Statistics on numbers added to catalog are still possible with a little forethought.
EBOOK PLATFORM USAGE

![Ebook Platform Usage Chart]

- ABC-CLIO (Individual Titles)
- Annual Reviews
- Ebrary
- Gale
- Salem Press

- 2008/2009
- 2009/2010
LIGHT BULB MOMENT!!
QUEEN ELIZABETH I & LORD DUDLEY
Instead of reading all of these books ...
You just search on “elizabeth” and “robert dudley”
Can we get it in ebook format?

Is the pricing reasonable?

If no ebook format, then try print.

“Dogs and cats, living together. Mass hysteria!!”

-- Bill Murray in Ghostbusters
Add 1000s of record for titles that you don’t own

Buy is “triggered” if a user reaches a threshold of use

Vendor supplies reports of purchases at regular intervals (weekly, daily, etc.)
Began with subject selections
  - Psychology
  - Language & Literature
  - Business

Beginning collection included ~3300 titles

PDA Trigger for Buy –
  10 minutes of use
  10 pages viewed
  1 print
Individual title requests from faculty and librarians added to PDA collection

Potential savings in buying titles only if used
188 individual titles added to PDA collection

8 titles bought (as of May 5)
- 5 - teaching faculty requests
- 3 - librarian requests
OVERALL PDA ACTIVITY

- 4126 titles in PDA collection
- 62 titles bought
- 132 titles accessed but not triggered for buy

(as of May 5, 2011)
In March, 2010, Stetson Library instituted changes in workflow in Technical Services department.

- Separated physical formats from electronic formats.

- Two separate workflows to accommodate electronic formats.
JUST BREATHE
AND LET GO …

Questions?

Debbi Dinkins
ddinkins@stetson.edu
Stay Involved

Good Practices for Great Outcomes Portal

http://bit.ly/mFtTbd

On WebJunction

webjunction.org/technical-services

Crossroads (monthly newsletter)

webjunction.org/crossroads

Events

webjunction.org/events/webinars

August 10-11 Online Conference

Trends in Library Training and Learning