

**CALA 21st Century Librarian Seminar Project
Team Member Report¹**

Seminar Location: Taipei, Taiwan
Seminar Dates: From: Aug. 11 2009 to Aug. 15, 2009

Your name: Julie Su

**Your topics: “Efficient management and excellent services”
“Electronic resources management and collection policy”**

As one of the three member delegations from CALA, I participated in the 2009 summer library seminar in Taipei, Taiwan. (August 10-15). There were 82 registrants participants. The theme of the seminar is: In search of excellence: Library management in a new age. My talks are entitled: “Efficient management and excellent services” (3 hours) and “Electronic resources management” (1 hour). We were also invited by the National Taiwan University to give a briefing at the Library and Library School’s special lecture session (1 hour for each person).

Summary of my presentations:

1. Libraries are facing the new challenges in resources management services largely due to the new environment which is characterized by: fast growing electronic environment, information explosion, library materials price increase, library budget shortage; new and increased workload, fast changing new technologies combined with serious staffing shortage in technical services.
2. In On the Record, the final report of the Library of Congress Working Group on the future of bibliographic control, the Group made recommendations in 5 major areas. My presentations highlighted areas: 1) Increase the Efficiency of Bibliographic Record Production and Maintenance, 3) Position our Technology for the Future, and the continuing education part of 5) Strengthen the library profession and education
3. I agree with the strategic directions which the Report pointed to and the positive responses and actions that Library of Congress are taking on. I do believe in principle these recommendations that are very applicable for all libraries as we are all facing similar challenges in the new electronic environment worldwide.
4. The following strategies for improving the efficiency in bibliographic control are highlighted
 - a. Avoid redundancy of cataloging activities among all libraries
 - b. All libraries get involved in cataloging record creation, enhancement and maintenance
 - c. “Make use of more bibliographic data available earlier in the supply chain”
 - d. “Repurpose existing metadata for greater efficiency”
 - e. Developing efficient cataloging collaboration in the Web environment

¹ Add more paper as need.

5. A good example of ongoing projects is VIAF, the Virtual International Authority File which is spearheaded by Barbara Tillett at LC. It envisions to use and connect the name authority files of each national libraries worldwide to build an international virtual authority file, utilizing vernacular language and scripts; and how that would benefit all libraries and avoid duplicating efforts and increase accuracy and efficiency at the global scale. I also demonstrated its pilot application in OCLC WorldCat Identities project which displays Chinese authors in variant forms of names and in different languages and scripts.
6. Speaking of the technology of the future, I emphasized the importance of standardization in the library community and the entire information industry and information supply chain. I also gave an example of how MARC format for Holdings data are implemented in ILS system therefore automate the predictive serials checkin pattern in Innovative Interfaces Millennium system. Further development of Electronic Data Interchange (EDI) can even automate manual checkin serials issues with the implementation of new technology and standards.
7. I also introduced Cooperative Cataloging Program which has been very successful in providing continuing training workshops and documentation for cataloging community. I also pointed out the workshop training materials are now freely available for download. I also pointed out several MARC conversion tools, cross-walk between non-MARC and MARC formats and documentation are also freely available at the Library of Congress website.
8. Part II of my presentation focuses on electronic resources management and collection policy. I spoke about the challenges of electronic resources, especially electronic journals, the challenge of aggregator, free open access journals, etc. New tasks brought in by electronic resources include licensing, content stability, ownership vs. leasing, etc. As the result, Digital Federation of Libraries developed standards for tracking electronic resources licensing, costs, etc. New electronic resources management systems are also developed to help libraries manage e-resources.
9. The changing nature of electronic journal contents becomes a challenge for libraries to track and monitor the ins and outs of thousands of electronic contents in hundreds of electronic packages. Many libraries are outsourcing the work to the new electronic access and management service vendors such as SerialsSolutions.
10. Standardization has become more and more important to all players in electronic resource management. In order to further automate the ERM functions with as little human intervention as possible, the information vendor communities realize that data must be able to exchange and transfer from one system to another with ease. Standards or best practices such as ONIX for serials, ONIX-PL (publications licenses) & OPLE, NISO COUNTER (for usage statistics) and CORE (Cost of Resource Exchange) are being developed very quickly. Also, it becomes more and more apparent that metadata for electronic content needs to be accurate from the source to the end user. Best practices such as KBART and Project Transfer are developed and promoted very recently by UKSG. Hopefully in the future these will aid to the reduction of ERM workload.

Economic downturn and poor budget situation caused most libraries to abandon their print journal subscriptions for electronic format as soon as possible. While stepping into a nearly complete electronic collection, libraries find themselves dealing with some age-old fundamental collection policy and philosophy. Moreover, perpetual access, ownership vs. access, rights management, institutional repositories etc. are new issues to library collection managers. Personally, I envision of technical services in the future: Network level cataloging, instead of maintaining catalog records at the local catalog only. Continued expansion of cataloging cooperation globally. Further development and wide adoption of ERM standards to facilitate data exchange between systems without human intervention. Greater collaboration with vendors, publishers to eliminate redundancy of efforts, and to maximize and streamline metadata management thus achieving higher efficiency in resource management.

Your evaluation of the seminar you have participated:

After the first part of the presentation, I found out that some of the terms I used from 英汉图书馆情报学词汇 (published in Beijing, 2007) are very different from the terms used in the Taiwan library community, I therefore, tried to modify as many slides as possible before delivering part II of my presentation. I was glad that they are more aligned with the current usage in Taiwan. Unfortunately, the slides in the handouts were different from the presentation.

I was pleased to see that some of the topics generated questions and discussions after the session. And I understand that many of the technical services staff from the hosting library came to the session, and they wish to have more time spent on their specific local operations.

I received similar positive feedback from the National Taiwan University briefing sessions. In fact, when I visited National Taiwan University the following week, I spent another 2 hours with their cataloging and serials librarians discussing cataloging issues and answering their questions. I enjoyed this type of professional discussions.

I wish that I had a point of contact at the National Normal University to help me preparing my presentation. I also wish that I had a better understanding or knowledge of the current state of their academic library operations. For instance, what cataloging and authority control rules do they use for Chinese language materials and what rules for Western language materials. Are they using OCLC? Later I did find the National Central Library has played a strong leadership role in bibliographic control and national digitization initiatives. Had I have those information before the seminar, I probably would change some of my presentations to better fit their needs.

Your suggestions:

It would be helpful if CALA can identify contact persons from the co-sponsoring institution that the CALA team members may send draft presentation over for

their review and feedback. Also, we can better understanding their library operations and issues. Such information will help us to prepare talks that are better fit their needs.

As the co-sponsoring body to conduct a pre-conference survey asking registrants what their interests and expectations are, and to share the survey results with CALA at least 4 weeks before the seminar.

Report by: Julie Su